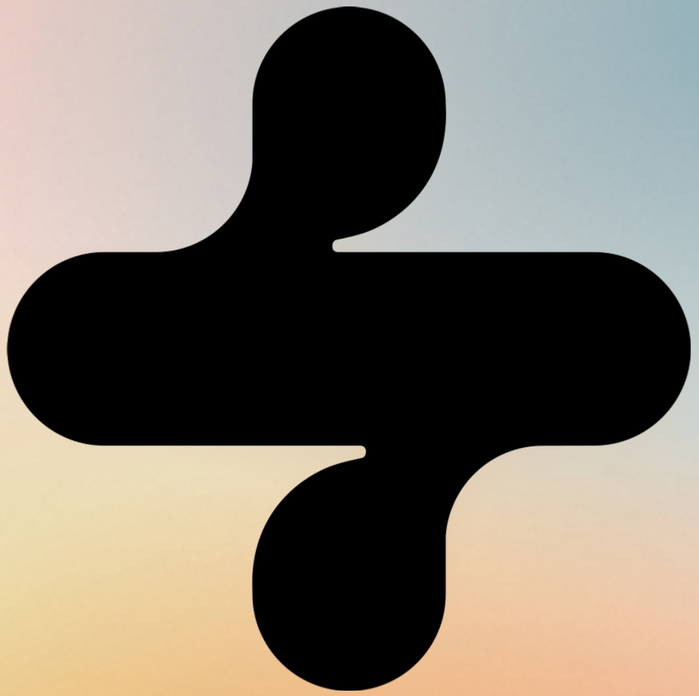
FREE GUIDE · 2026 EDITION

The 50 Workflows Field Guide

Find your first workflow.



Explore 50 jobs across sales, service, operations, finance and HR. See what starts each one, where AI can help and what a person still decides.

Includes an AI Workflow Automation Canvas

spark(factory)

What's inside.

Start with the team you know best. Pick a job you can trace from a recent email, call or order, then map it on pages 16–17.

01

Start

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How to read a workflow card.

The level tells you how much the system decides. The effort gives you a guide to setup, depending on your systems and how often the job takes an unusual turn.

C03 03 AI AGENT · VOICE

EFFORT ●●○ Medium

Booking and rescheduling

TRIGGER
A customer wants to book, move or cancel.

WHAT THE AI DOES
Checks the live calendar, offers times, confirms and updates the booking system.

WHAT A PERSON DOES
Handles exceptions and priority customers.

WHERE THE PAYBACK COMES FROM
Fewer missed bookings and no double handling.

Pick a card that reminds you of a recent job. Follow what happens from the trigger to the person who receives the result.

01 WORKFLOW
Fixed steps and set rules. The same input follows the same route.

02 AI-POWERED WORKFLOW
A fixed path, with AI reading, drafting or sorting at specific steps.

03 AI AGENT
Given a goal, tools and limits, it chooses steps and passes exceptions to a person.

04 MULTI-AGENT SYSTEM
A lead agent coordinates specialist agents, each with a narrow job.

EFFORT

Low
One system, clear rules.

Medium
Two or three systems, or some judgement.

High
Several systems and many exceptions.

VOICE Works over the phone. It listens, speaks and can act in your systems during the call.

01

Sales and marketing

Slow replies and patchy sales admin can cost a team deals. Start where enquiries or quotes wait the longest.

SOUNDS FAMILIAR?

Enquiries wait until tomorrow.

Reps update the CRM late in the week.

Someone has to build every quote.

S01 — Speed-to-lead follow-up

02 AI-POWERED WORKFLOW

EFFORT ●○○ Low

TRIGGER
A web form or enquiry email arrives.

WHAT THE AI DOES
Replies within minutes, asks two or three qualifying questions and books a call in the right rep's calendar.

WHAT A PERSON DOES
Takes the booked call. Sets the qualifying rules.

WHERE THE PAYBACK COMES FROM
More enquiries become meetings because nobody waits until tomorrow.

S02 — After-hours enquiry line

03 AI AGENT · VOICE

EFFORT ●●○ Medium

TRIGGER
A call comes in outside business hours.

WHAT THE AI DOES
Answers, captures the need, location and urgency, then books a callback or visit.

WHAT A PERSON DOES
Calls back the hottest leads first thing. Reads the call summaries.

WHERE THE PAYBACK COMES FROM
Calls that went to voicemail become booked work.

S03 — CRM update after every meeting

02 AI-POWERED WORKFLOW

EFFORT ●○○ Low

TRIGGER
A sales meeting ends.

WHAT THE AI DOES
Writes the summary, updates deal stage, next step and contacts, and drafts the follow-up email.

WHAT A PERSON DOES
Checks the email and sends it.

WHERE THE PAYBACK COMES FROM
Reps get their evenings back and the pipeline becomes something you can trust.

S04 — Pre-meeting research brief

03 AI AGENT

EFFORT ●○○ Low

TRIGGER
A first meeting is booked with a new prospect.

WHAT THE AI DOES
Researches the company and contact from public sources and CRM history, then writes a one-page brief.

WHAT A PERSON DOES
Reads it and decides the angle.

WHERE THE PAYBACK COMES FROM
Better first meetings without an hour of preparation.

S05 — Quote and proposal first drafts

02 AI-POWERED WORKFLOW

EFFORT ●●○ Medium

TRIGGER
A rep marks a deal ready to quote.

WHAT THE AI DOES
Drafts the proposal from your price list, past proposals and the meeting notes.

WHAT A PERSON DOES
Checks pricing and terms, then sends.

WHERE THE PAYBACK COMES FROM
Quotes go out the same day, with fewer copy-paste pricing errors.

S06

04 MULTI-AGENT SYSTEM

●●● EFFORT High

Tender and RFP responses

TRIGGER
Tender documents arrive.

WHAT THE AI DOES
Splits out the requirements, drafts answers from your content library and flags gaps and compliance items.

WHAT A PERSON DOES
Owns the win themes, pricing and final review.

WHERE THE PAYBACK COMES FROM
More bids from the same team, with less late-night assembly.

S07

02 AI-POWERED WORKFLOW

●○○ EFFORT Low

Lapsed customer win-back

TRIGGER
A customer has not ordered for a set number of days.

WHAT THE AI DOES
Drafts a personal check-in from their order history and routes any replies.

WHAT A PERSON DOES
Approves the rules. Handles replies that show buying intent.

WHERE THE PAYBACK COMES FROM
Revenue from customers you have already won once.

S08

01 WORKFLOW

●○○ EFFORT Low

Lead routing and enrichment

TRIGGER
A new lead lands in the CRM.

WHAT IT DOES
Fills in missing company details, scores fit and assigns it to the right rep or territory.

WHAT A PERSON DOES
Sets the routing rules. Reviews unassigned leads each week.

WHERE THE PAYBACK COMES FROM
Leads reach the right rep in minutes, not days.

S09

02 AI-POWERED WORKFLOW

●○○ EFFORT Low

Content repurposing

TRIGGER
A webinar, case study or long article is approved.

WHAT THE AI DOES
Drafts social posts, newsletter blurbs and sales snippets in your house style.

WHAT A PERSON DOES
Edits and approves everything before it goes out.

WHERE THE PAYBACK COMES FROM
One piece of content does five jobs.

S10

01 WORKFLOW

●○○ EFFORT Low

Review and reference requests

TRIGGER
A job closes with good feedback.

WHAT IT DOES
Sends the review or reference request at the right moment, follows up once and logs the result.

WHAT A PERSON DOES
Chooses which customers to ask.

WHERE THE PAYBACK COMES FROM
A steady flow of reviews without anyone having to remember.

ASK YOUR TEAM

How long does a new lead wait?

Open the last three web enquiries. Compare when each arrived with the first useful reply.

If the delay happens before a rep sees the lead, map S01 on page 16.

02

Customer service

A few repeat questions can fill the queue. Handle the common requests so staff have time for cases that need a person.

SOUNDS FAMILIAR?

- The phone queue fills at 9 am.
- The same questions fill the inbox.
- Customers chase a missed callback.

C01 — Email triage and drafted replies

02 AI-POWERED WORKFLOW

EFFORT ●○○ Low

TRIGGER
An email reaches the support inbox.

WHAT THE AI DOES
Tags it by topic and urgency, pulls the order details and drafts a reply.

WHAT A PERSON DOES
Approves or edits the reply. Handles complaints personally.

WHERE THE PAYBACK COMES FROM
Faster first responses, and staff time goes to the hard tickets.

C02 — "Where is my order?"

03 AI AGENT · VOICE

EFFORT ●●○ Medium

TRIGGER
A customer asks by phone, chat or email.

WHAT THE AI DOES
Looks up the order and courier tracking, answers and logs the contact.

WHAT A PERSON DOES
Takes delayed or damaged orders.

WHERE THE PAYBACK COMES FROM
The most common question stops tying up the phones.

C03 — Booking and rescheduling

03 AI AGENT · VOICE

EFFORT ●●○ Medium

TRIGGER
A customer wants to book, move or cancel.

WHAT THE AI DOES
Checks the live calendar, offers times, confirms and updates the booking system.

WHAT A PERSON DOES
Handles exceptions and priority customers.

WHERE THE PAYBACK COMES FROM
Fewer missed bookings and no double handling.

C04 — Returns and refunds intake

03 AI AGENT

EFFORT ●●○ Medium

TRIGGER
A return request arrives.

WHAT THE AI DOES
Checks the order against your returns policy, collects photos and a reason, then issues a label or routes it for approval.

WHAT A PERSON DOES
Approves anything outside policy.

WHERE THE PAYBACK COMES FROM
Consistent decisions and quicker refunds within policy.

C05 — Product answers for frontline staff

02 AI-POWERED WORKFLOW

EFFORT ●○○ Low

TRIGGER
A service rep asks a product, spec or warranty question mid-call.

WHAT THE AI DOES
Answers from your product manuals and links the source.

WHAT A PERSON DOES
Owns the source documents. Corrects wrong answers.

WHERE THE PAYBACK COMES FROM
New starters get up to speed faster, with fewer interruptions for senior staff.

C06

02 AI-POWERED WORKFLOW

●○○ EFFORT Low

Call summaries and follow-up

TRIGGER
A support call ends.

WHAT THE AI DOES
Writes the summary, updates the ticket and sends the customer a recap.

WHAT A PERSON DOES
Checks any commitment made on the call.

WHERE THE PAYBACK COMES FROM
No lost promises and less after-call work.

C07

02 AI-POWERED WORKFLOW

●○○ EFFORT Low

Complaint early warning

TRIGGER
Messages and reviews come in.

WHAT THE AI DOES
Spots frustration, repeat contacts and cancellation risk, then alerts the right manager with context.

WHAT A PERSON DOES
Calls the customer.

WHERE THE PAYBACK COMES FROM
Problems get fixed before they become cancellations or one-star reviews.

C08

01 WORKFLOW · VOICE

●○○ EFFORT Low

Appointment reminders

TRIGGER
An appointment is two days away.

WHAT IT DOES
Sends an SMS reminder, reads the confirm or reschedule reply and updates the calendar.

WHAT A PERSON DOES
Fills the freed-up slots.

WHERE THE PAYBACK COMES FROM
Fewer no-shows.

C09

02 AI-POWERED WORKFLOW

●○○ EFFORT Low

Customer feedback themes

TRIGGER
A week of surveys, reviews and tickets closes.

WHAT THE AI DOES
Groups the themes, quotes examples and shows what changed since last week.

WHAT A PERSON DOES
Decides what to fix.

WHERE THE PAYBACK COMES FROM
Decisions based on all the feedback, not the loudest voice.

C10

03 AI AGENT

●●○ EFFORT Medium

Warranty and service claims

TRIGGER
A claim is submitted.

WHAT THE AI DOES
Checks warranty status, collects serial numbers and photos, creates the job and books a technician or routes it for assessment.

WHAT A PERSON DOES
Assesses claims outside the warranty rules.

WHERE THE PAYBACK COMES FROM
Claims move without rounds of back-and-forth email.

ASK YOUR TEAM

Which replies keep getting rewritten?

Ask a service rep for three recent replies to the same question. What information did they have to look up?

Use C01 to mark what a draft can cover and when a person takes over.

03

Operations

Follow the work between teams and systems. Look for an order, job or stock update that someone retypes or chases.

SOUNDS FAMILIAR?

- Orders arrive in PDFs or email.
- Someone moves data between systems.
- Staff chase a status that already exists.

001 — Supplier document intake

02 AI-POWERED WORKFLOW

EFFORT ●●○ Medium

TRIGGER
A supplier sends an order confirmation or delivery note.

WHAT THE AI DOES
Reads the document, enters it into your system and flags anything that does not match.

WHAT A PERSON DOES
Resolves the mismatches.

WHERE THE PAYBACK COMES FROM
Hours of keying gone, with fewer errors.

002 — Customer order entry

02 AI-POWERED WORKFLOW

EFFORT ●●○ Medium

TRIGGER
An order arrives by email or PDF.

WHAT THE AI DOES
Pulls out the lines, matches products and customer pricing, and creates the sales order.

WHAT A PERSON DOES
Checks unusual orders before confirming.

WHERE THE PAYBACK COMES FROM
Same-day processing without extra staff.

003 — Stock and reorder alerts

02 AI-POWERED WORKFLOW

EFFORT ●○○ Low

TRIGGER
Stock drops below a set level or sales spike.

WHAT THE AI DOES
Drafts a reorder with suggested quantities and sends it to the buyer.

WHAT A PERSON DOES
Approves the purchase order.

WHERE THE PAYBACK COMES FROM
Fewer stock-outs and less cash tied up in excess stock.

004 — Supplier chasing

03 AI AGENT

EFFORT ●○○ Low

TRIGGER
A confirmation or delivery is overdue.

WHAT THE AI DOES
Emails the supplier, updates the expected date in your system and escalates when it slips.

WHAT A PERSON DOES
Handles the escalations.

WHERE THE PAYBACK COMES FROM
Buyers stop spending their mornings chasing.

005 — Job scheduling and dispatch

03 AI AGENT

EFFORT ●●● High

TRIGGER
A new job is booked.

WHAT THE AI DOES
Suggests the technician and slot by skill, location and availability, then sends the job pack.

WHAT A PERSON DOES
The dispatcher confirms and sorts out clashes.

WHERE THE PAYBACK COMES FROM
More jobs per day and less travel between them.

006 — Field job reports

02 AI-POWERED WORKFLOW

EFFORT ●●○ Medium

TRIGGER
A technician finishes a job and leaves a voice note or photos.

WHAT THE AI DOES
Turns the notes into a job report, updates the system and drafts the invoice lines.

WHAT A PERSON DOES
The technician checks it. The office approves the invoice.

WHERE THE PAYBACK COMES FROM
Faster invoicing and fewer missing details.

007 — Quote-to-job handover

01 WORKFLOW

EFFORT ●○○ Low

TRIGGER
A customer accepts a quote.

WHAT IT DOES
Creates the job, orders materials, books the kickoff and tells the team.

WHAT A PERSON DOES
The project lead confirms scope.

WHERE THE PAYBACK COMES FROM
No dropped steps between sales and delivery.

008 — Licence and certificate tracking

01 WORKFLOW

EFFORT ●○○ Low

TRIGGER
A licence, insurance or certificate nears expiry.

WHAT IT DOES
Tracks the dates, asks staff and subcontractors for renewals and chases them.

WHAT A PERSON DOES
Decides what to do about anything that lapses.

WHERE THE PAYBACK COMES FROM
No surprise lapses on site.

009 — Daily operations summary

02 AI-POWERED WORKFLOW

EFFORT ●○○ Low

TRIGGER
It is 7 am.

WHAT THE AI DOES
Pulls yesterday's orders, jobs and exceptions into a one-page summary of what needs attention.

WHAT A PERSON DOES
Acts on it.

WHERE THE PAYBACK COMES FROM
Managers start the day knowing where to look.

010 — Incident and quality logging

02 AI-POWERED WORKFLOW

EFFORT ●○○ Low

TRIGGER
An incident is reported by form, email or call.

WHAT THE AI DOES
Logs it with category, severity and photos, routes it to the owner and tracks the actions.

WHAT A PERSON DOES
Investigates and closes it.

WHERE THE PAYBACK COMES FROM
Nothing slips, and the trends become visible.

ASK YOUR TEAM

Where does the team type it twice?

Follow one order from the inbox into your system. Find a field someone copies by hand.

Map O02 and mark who resolves a missing or conflicting detail.

04

Finance and admin

Finance teams work with repeatable rules and records. Approval and resolution stay with the person who owns the numbers.

SOUNDS FAMILIAR?

Invoices wait to be matched.

Managers chase missing approvals.

Month-end starts with manual sorting.

F01 Accounts payable matching

02 AI-POWERED WORKFLOW

EFFORT ●●○ Medium

TRIGGER
A supplier invoice arrives.

WHAT THE AI DOES
Pulls out the details, matches the purchase order and receipt, codes it and queues it for approval. Flags duplicates.

WHAT A PERSON DOES
Approves payments and handles exceptions.

WHERE THE PAYBACK COMES FROM
Less keying and fewer duplicate payments.

F02 Overdue invoice reminders

01 WORKFLOW

EFFORT ●○○ Low

TRIGGER
An invoice passes its due date.

WHAT IT DOES
Sends polite reminders at set intervals, logs replies and routes disputes.

WHAT A PERSON DOES
Follows up on disputed or large invoices.

WHERE THE PAYBACK COMES FROM
Cash comes in sooner.

F03 Invoice and billing questions

03 AI AGENT · VOICE

EFFORT ●●○ Medium

TRIGGER
A customer calls about an invoice.

WHAT THE AI DOES
Checks who is calling, explains the charges, resends the invoice and logs any dispute.

WHAT A PERSON DOES
Handles disputes, payment arrangements and hardship.

WHERE THE PAYBACK COMES FROM
Accounts stop answering the same invoice questions.

F04 Expense coding and receipts

02 AI-POWERED WORKFLOW

EFFORT ●○○ Low

TRIGGER
A card transaction lands.

WHAT THE AI DOES
Matches the receipt, suggests the account code and GST treatment, and chases missing receipts.

WHAT A PERSON DOES
Reviews flagged items.

WHERE THE PAYBACK COMES FROM
Month-end closes faster.

F05 Bank reconciliation matches

02 AI-POWERED WORKFLOW

EFFORT ●○○ Low

TRIGGER
The daily bank feed updates.

WHAT THE AI DOES
Suggests matches for unreconciled lines using remittances and emails.

WHAT A PERSON DOES
Approves the matches.

WHERE THE PAYBACK COMES FROM
Reconciliations stay current instead of piling up.

F06

02 AI-POWERED WORKFLOW

EFFORT ●●○ Medium

Month-end report pack

TRIGGER
The month closes.

WHAT THE AI DOES
Pulls the figures, drafts commentary on variances and assembles the management pack.

WHAT A PERSON DOES
The finance lead checks numbers and commentary.

WHERE THE PAYBACK COMES FROM
Month-end closes days sooner.

F07

03 AI AGENT

EFFORT ●●○ Medium

Trade credit applications

TRIGGER
A new trade account application arrives.

WHAT THE AI DOES
Checks the ABN and details, collects references and prepares a summary with a limit inside your policy.

WHAT A PERSON DOES
Approves the credit limit.

WHERE THE PAYBACK COMES FROM
New accounts open faster, with the same checks every time.

F08

01 WORKFLOW

EFFORT ●○○ Low

Supplier set-up and bank changes

TRIGGER
A new supplier, or a request to change bank details.

WHAT IT DOES
Collects ABN, insurance and bank details by form, checks the ABN and flags every bank change for call-back.

WHAT A PERSON DOES
Verifies bank changes by phone on a number you already hold.

WHERE THE PAYBACK COMES FROM
A cleaner supplier list and fewer chances for payment fraud.

F09

02 AI-POWERED WORKFLOW

EFFORT ●○○ Low

Contract and renewal tracking

TRIGGER
A contract is uploaded.

WHAT THE AI DOES
Pulls out key dates, notice periods and price rises, and sends reminders before renewal.

WHAT A PERSON DOES
Decides to renew, renegotiate or exit.

WHERE THE PAYBACK COMES FROM
No more contracts rolling over by accident.

F10

02 AI-POWERED WORKFLOW

EFFORT ●○○ Low

Shared accounts inbox

TRIGGER
An email reaches the accounts inbox.

WHAT THE AI DOES
Sorts invoices, statements, queries and spam, files documents and drafts replies to simple questions.

WHAT A PERSON DOES
Handles queries that need judgement.

WHERE THE PAYBACK COMES FROM
The shared inbox stops being someone's full-time job.

ASK YOUR TEAM

What holds up an invoice?

Trace one invoice from arrival to approval. Where did it sit while someone checked a detail?

Use F01 to separate routine matching from the decision to release payment.

05

People and HR

Hiring and onboarding involve scheduling, chasing and summarising. Keep decisions about people with people.

SOUNDS FAMILIAR?

Candidates wait for interview times.

New starters lack equipment or access.

HR fields repeat leave questions.

H01 — Application summaries

02 AI-POWERED WORKFLOW

EFFORT ●○○ Low

TRIGGER
An application arrives.

WHAT THE AI DOES
Summarises it against the role criteria in the same structure every time.

WHAT A PERSON DOES
Decides who to interview, and checks the summaries for bias.

WHERE THE PAYBACK COMES FROM
Every application read against the same criteria, in hours.

H02 — Interview scheduling

01 WORKFLOW

EFFORT ●○○ Low

TRIGGER
A candidate is shortlisted.

WHAT IT DOES
Offers times from the panel's calendars, books, sends details and reminders and handles reschedules.

WHAT A PERSON DOES
Confirms the panel. Steps in when a candidate calls instead.

WHERE THE PAYBACK COMES FROM
Days off your time to hire.

H03 — Candidate screening calls

03 AI AGENT · VOICE

EFFORT ●●○ Medium

TRIGGER
A shortlisted candidate agrees to a screen.

WHAT THE AI DOES
Says it is an AI, runs a short structured phone screen and writes a summary.

WHAT A PERSON DOES
Reviews the summary and makes every decision.

WHERE THE PAYBACK COMES FROM
Recruiters spend their time on the strongest candidates.

H04 — Reference checks

02 AI-POWERED WORKFLOW

EFFORT ●○○ Low

TRIGGER
A preferred candidate is chosen.

WHAT THE AI DOES
Sends structured questions to referees, chases and summarises the answers.

WHAT A PERSON DOES
Calls a referee when anything is unclear. Makes the decision.

WHERE THE PAYBACK COMES FROM
References done in days, not weeks.

H05 — New starter onboarding

01 WORKFLOW

EFFORT ●○○ Low

TRIGGER
A contract is signed.

WHAT IT DOES
Requests accounts and equipment, sends the welcome pack, books induction and chases forms.

WHAT A PERSON DOES
The manager welcomes and inducts them.

WHERE THE PAYBACK COMES FROM
New starters are ready to work on day one.

H06 — Staff policy questions

02 AI-POWERED WORKFLOW

EFFORT ●○○ Low

TRIGGER
A staff member asks about leave, expenses or a policy.

WHAT THE AI DOES
Answers from your handbook with the source linked, and logs the question.

WHAT A PERSON DOES
HR handles anything personal or sensitive.

WHERE THE PAYBACK COMES FROM
Consistent answers, and HR time back.

H07 — Leave and roster requests

01 WORKFLOW

EFFORT ●○○ Low

TRIGGER
Someone requests leave or a shift swap.

WHAT IT DOES
Checks balances and cover, routes it for approval and updates the roster.

WHAT A PERSON DOES
The manager approves.

WHERE THE PAYBACK COMES FROM
Fewer gaps and no lost requests.

H08 — Training role-play calls

03 AI AGENT · VOICE

EFFORT ●●○ Medium

TRIGGER
A rep or service team member wants practice.

WHAT THE AI DOES
Plays a customer (a difficult call, an objection, a complaint) and scores it against your rubric.

WHAT A PERSON DOES
A coach reviews the scores.

WHERE THE PAYBACK COMES FROM
More practice without pulling senior staff off the floor.

H09 — Position descriptions and ads

02 AI-POWERED WORKFLOW

EFFORT ●○○ Low

TRIGGER
A new role is approved.

WHAT THE AI DOES
Drafts the position description and ad from your templates and similar roles.

WHAT A PERSON DOES
The hiring manager edits it and checks award and legal wording.

WHERE THE PAYBACK COMES FROM
Roles go to market faster.

H10 — Exit and pulse survey themes

02 AI-POWERED WORKFLOW

EFFORT ●○○ Low

TRIGGER
An exit or pulse survey closes.

WHAT THE AI DOES
Summarises themes and comments and compares them with last period.

WHAT A PERSON DOES
Leadership decides what to act on.

WHERE THE PAYBACK COMES FROM
You hear the pattern, not just the last comment.

ASK YOUR TEAM

Where does scheduling stall?

Follow the last interview invitation. Who chased the panel, offered new times or confirmed the booking?

Map H02 and keep a person available for candidate questions.

Five places to start.

Good first workflows run often, follow a clear path and have an owner who can check whether the change worked.

S01

Speed-to-lead follow-up

Compare enquiry arrival with the first useful reply.

C01

Email triage and drafted replies

Look for repeat requests a person already knows how to answer.

O02

Customer order entry

Find fields the team copies from an email or PDF into the order system.

F01

Accounts payable matching

Use the existing finance rules to find matches and surface exceptions.

H02

Interview scheduling

Count the time spent arranging and changing interview times.

Bring one real case.

Find the last one

Pull up the email, form or order that started it.

Watch the handover

Look for waiting, retyping or an approval request.

Name the owner

Ask who can say whether the result is good enough.

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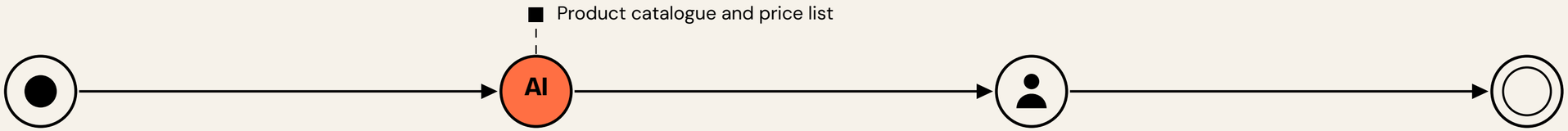
From an emailed order to a draft sales order.

O02 Customer order entry. The order desk lead owns the process.

ONE RECENT ORDER

A customer orders 12 cartons by email.

Their PDF uses an old product code. A coordinator retypes each line, then asks sales which item the customer meant.



TRIGGER AND INPUTS

An order email arrives

The workflow reads the customer name, product code and quantity from the PDF.

AUTOMATED STEP

Draft the matching lines

It checks the product catalogue and price list, then builds a draft with the PDF attached.

HUMAN DECISION

Resolve the old code

The coordinator checks the item with the account manager. The order stays on hold until they agree.

OUTPUT AND HANDOVER

Release the checked order

The coordinator approves the draft. The warehouse receives a confirmed order with the right item and quantity.

Trigger · AI step · Person checks · Result · System or tool

HOW THE TEAM WOULD TEST IT

Replay 20 past orders. Verify each draft and send unknown codes to the coordinator before release.

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WORKFLOW CANVAS

Map one workflow.

Choose one real job you can trace from the first trigger to the final handover.

FICTIONAL WORKED EXAMPLE

WORKFLOW NAME

Service quote follow-up · Wattle Quay Services (fictional)

PROCESS OWNER

Dana Lee · Operations

SCOPE AND OUTCOME

Send one reminder for eligible open quotes and log it in the CRM.

TRIGGER

A quote is still open three business days after it was sent.

INPUTS AND SOURCES

Approved CRM record, quote status and contact.

OUTPUT AND RECIPIENT

Approved reminder to the customer. CRM logs the send.

Trace the major steps.

Name the person or tool doing each step.

STEP	WHAT HAPPENS?	WHO DOES IT?	DECISION OR HANDOVER
01	Find open quotes due for one follow-up.	CRM rule	Skip accepted or expired quotes and opted-out customers.
02	Draft the reminder using the approved template.	Draft assistant	Hold quotes with missing or inconsistent details.
03	Check the draft and send it once.	Sales coordinator	Escalate any price or scope changes.
04	Log delivery and route replies.	CRM + sales coordinator	Stop reminders after a reply or an acceptance.

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WORKFLOW CANVAS

Plan the trial. Set controls.

Agree how the team will check results and what would make them pause the trial.

FICTIONAL WORKED EXAMPLE

WHAT WILL YOU TRIAL?

Run the trial on 60 open quotes in one service region over four weeks. Draft one reminder at day three. Sales approves every send.

PEOPLE AND RESPONSIBILITIES

Dana owns the results. Sales checks drafts and scope changes. The CRM admin can disable the rule. Customers can opt out.

QUALITY STANDARD

Log at least 95% of eligible follow-ups and send zero duplicates. Target 12 admin hours per month against 26 today.

HOW WILL YOU CHECK?

Audit each send in week one and 10 per week after that. Compare logged follow-ups and time with the manual baseline.

WHEN MUST A PERSON STEP IN?

Hold when the status or contact is unclear, the price changes or the customer opts out. Pause after any unapproved send.

PRIVACY, CONSENT AND COMPLIANCE

Use approved CRM fields only and exclude free-text job notes. Follow existing opt-out and retention rules.

REVIEW DATE

14 June 2027

DECISION OWNER

Dana Lee

DECISION

Proceed if the safeguards and targets hold.

We build AI workflows.

We run them, too.

Spark Factory finds, builds and runs AI workflows for growth companies. We take on one workflow at a time, with a result your team can measure.

01

Find.

Find the repeatable job where AI can improve cost, speed or quality.

02

Build.

Build into the tools you use and test against real work. Fixed price, live in four weeks from sign-off.

03

Run.

Monitor, support and improve the workflow while it runs, for one monthly fee.

YOUR NEXT STEP

Bring one workflow.

Show us one job your team repeats. We'll help you choose the first workflow to trial.

Scan to book a call.

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