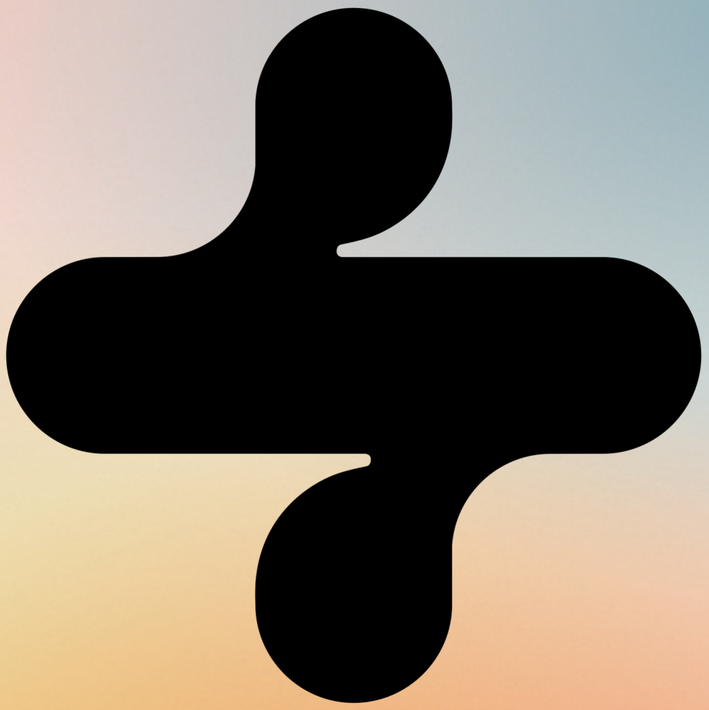
A growth company guide to AI automation.

in plain English

Four levels of automation and what each can do. Find the first job worth automating in your business.



What's inside.

A plain-English guide for leaders who need to decide where AI fits, who stays in control and what to build first.

01

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Mistakes and questions 16

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About Spark Factory 20

READING TIME 15 minutes, plus the templates on pages 17–19.

AI is everywhere. Results are harder to find.

Staff use AI to write faster, while quotes, orders and reports still move by hand. To improve the work, change how it runs.

88%

of organisations use AI regularly. Only 39% report an impact on profit.

McKinsey, The State of AI, 2025

~3×

as likely to have redesigned workflows around AI, among companies getting real value.

McKinsey, The State of AI, 2025

40%+

of agentic AI projects will be cancelled by the end of 2027, Gartner predicts.

Gartner, June 2025

2 in 3

Australian SMEs holding back on AI cite trust or human control. 43% of SMEs already use some AI.

Australian Government AI Adoption Tracker, Dec 2025 to Feb 2026

THE LESSON

Start with the work. Use only the AI it needs and keep key decisions with people.

The automation ladder.

Climb only as high as the work needs.

Each level handles more variety and judgement. It also takes more testing, oversight and budget.

01
Workflow

Fixed steps and rules run the same way each time.

WHO DECIDES

You decide in advance.

BEST FOR

Predictable, high-volume admin.

02
AI-powered workflow

Fixed steps with AI for reading, writing or sorting.

WHO DECIDES

You decide in advance.

BEST FOR

Emails, documents, forms and notes.

03
AI agent

An agent works out the steps within a defined goal and limits.

WHO DECIDES

The agent decides within your limits.

BEST FOR

Varied requests across systems.

04
Multi-agent system

A lead agent directs the team.

WHO DECIDES

A lead agent coordinates the team.

BEST FOR

Long jobs needing different skills.

INPUTS

Level 01 needs tidy inputs. Levels 02–04 can handle emails, documents and notes.

spark(factory)

Workflow

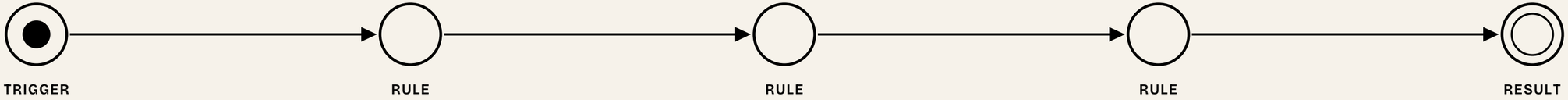
A fixed sequence runs when something happens. The same inputs produce the same result each time.

THE LADDER

01 | 02 | 03 | 04

THINK OF IT AS

A recipe followed exactly. It works as long as the ingredients stay the same.



TRIGGER
Starter signs
Contract marked signed in the HR system

RULE
Create accounts
Set up email and Teams, plus payroll

RULE
Send welcome pack
Fill in their name and start date

RULE
Book induction
Invite the starter and their manager

RESULT
Ready for day one
Alert the manager in Teams

Trigger · Fixed step · Result

Good for

+ Work that follows a checklist every time.
+ Moving data between systems.
+ Reminders, alerts and approvals.

Watch out for

+ A changed form or email can break a rule.
+ Rules cannot interpret documents or make judgement calls.
+ Large rule sets become hard to maintain.

In a growth company

+ Sales: assign enquiries and create CRM tasks.
+ Operations: send a tracking email when an order ships.
+ Finance: send invoice reminders on set days.

TYPICAL TOOLS

Zapier, Make, n8n, Power Automate and the workflows built into your CRM or HR system.

AI-powered workflow

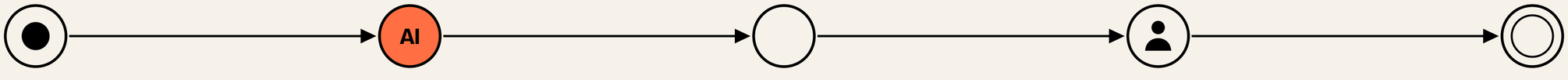
The path stays fixed. AI reads, drafts, sorts or summarises at a defined step.

THE LADDER

01 | **02** | 03 | 04

THINK OF IT AS

A skilled prep cook does the fiddly work. The chef still plates the dish.



TRIGGER
Notes saved
Recruiter uploads interview notes and the CV

AI STEP
Draft assessment
Read the notes and write to your template

RULE
Format and attach
Apply branding and attach the CV

PERSON CHECKS
Review the draft
A consultant edits and approves it

RESULT
Send to the client
Reviewing replaces most of the drafting

Trigger · Fixed step · AI step · Person checks · Result

Good for

+ Emails, PDFs, forms and call notes.
+ Drafting to a template or summarising records.
+ Sorting requests by type or urgency.

Watch out for

+ Put a person or rule after key AI steps.
+ Use real examples to test the instructions.
+ A small cost per run can add up at volume.

In a growth company

+ HR: draft a candidate summary.
+ Operations: read purchase orders into the order system.
+ Service: route and summarise support emails.

TYPICAL TOOLS

A workflow tool plus a model such as Claude, GPT or Gemini.

AI agent

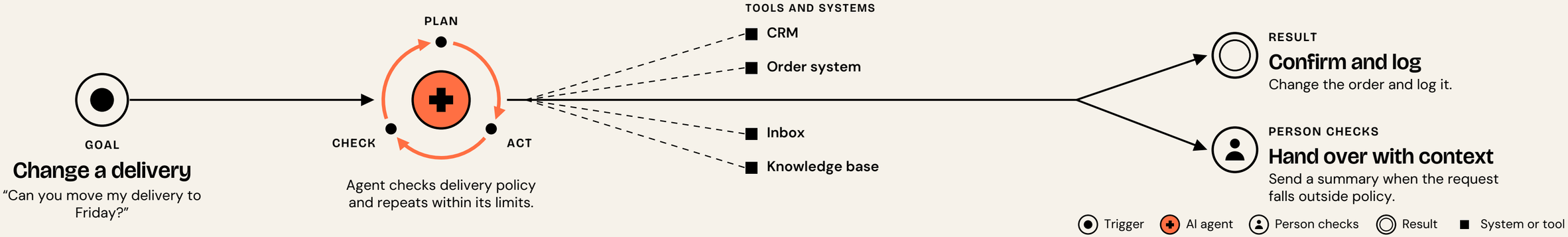
Give an agent a goal, tools and limits. It plans, acts and checks, then hands over if needed.

THE LADDER

01 | 02 | **03** | 04

THINK OF IT AS

A capable new hire with a clear goal and firm limits on what they can approve.



Good for

+ Varied requests within a known scope.
+ Looking things up across multiple systems.
+ First-line questions and research before a person decides.

Watch out for

+ Set explicit read, write and approval limits.
+ Test different paths and exceptions.
+ Confirm claims of agency against a real task.

In a growth company

+ Service: answer delivery queries and pass refunds to a person.
+ HR: look up policies and log exceptions.
+ Sales: research a lead before the call.

TYPICAL TOOLS

Claude, OpenAI, Copilot Studio or n8n agents connected to your systems.

Multi-agent system

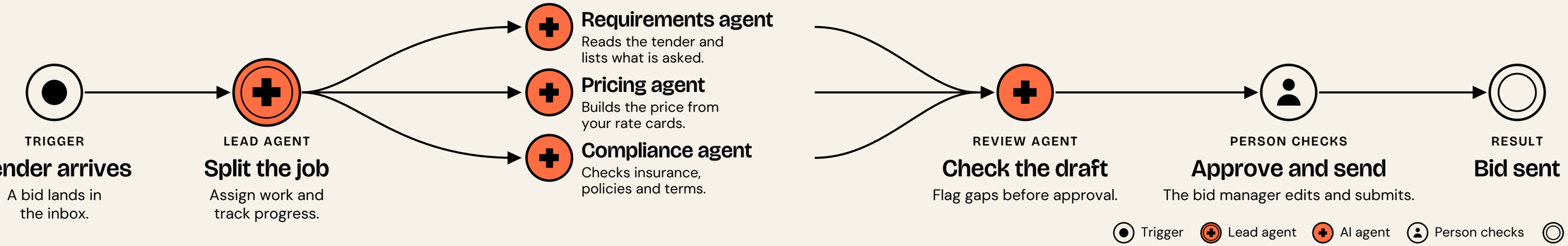
A lead agent splits the job among specialists.
Each agent works within a narrow role.

THE LADDER

01 | 02 | 03 | **04**

THINK OF IT AS

A head chef directs the stations and checks each dish before it leaves the pass.



Good for

+ Long jobs that need distinct skills.
+ High-volume work that can run in parallel.
+ Processes that benefit from a second check.

Watch out for

+ More paths and systems to test and monitor.
+ Cost rises with the number of agents involved.
+ Start with one agent. Split work as needed.

In a growth company

+ Sales: draft tender requirements, pricing and compliance in parallel.
+ Operations: split quotes, stock and orders.
+ HR: prepare hiring decisions for review.

TYPICAL TOOLS

Agent frameworks, typically built and operated by a specialist team.

One job, four ways.

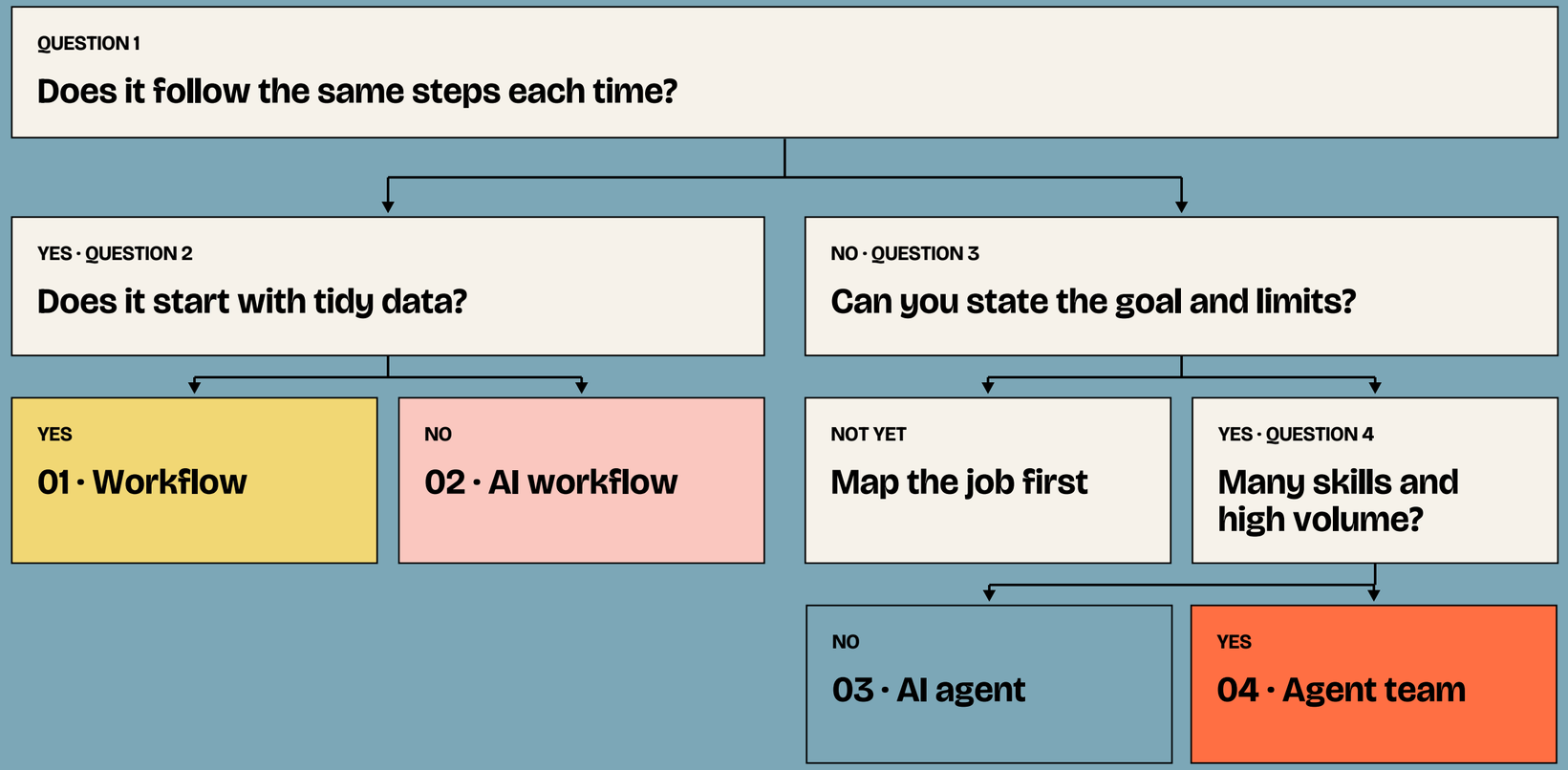
A customer asks by email to change order 4417 to 30 units and move delivery to Friday. Here’s how each level handles it.

LEVEL	WHAT HAPPENS	WHO DOES THE THINKING	WHAT THE PERSON DOES
01 · Workflow	A rule forwards the email to operations. A person finds the order, makes the change and replies.	A person	Does the whole job.
02 · AI-powered workflow	AI reads the request and drafts the order update and the reply for approval.	AI on a fixed path	Approves both actions.
03 · AI agent	The agent checks the order, stock and delivery schedule. It makes permitted changes, replies and logs the result.	The agent, within limits	Handles exceptions.
04 · Multi-agent system	A lead agent coordinates stock, pricing and reply agents, then checks the combined result.	A team of agents	Sets the rules and audits.

WHERE TO START	Most teams start at level 02 and move suitable work to level 03 after proving accuracy.

Choosing the right level.

Pick the simplest level that can do the job. It will usually cost less to build, be easier to test and earn trust faster.



KEEP A PERSON IN THE LOOP

Approval matters.

+ Customer-facing output until accuracy is proven.
+ Hiring, pay and staff reviews.
+ Payments, refunds or discounts above a set amount.
+ Actions you cannot undo.

Key terms.

The vocabulary you'll hear from vendors and your team, in one sentence each.

Large language model

The engine behind tools like Claude, ChatGPT and Gemini. It reads and writes language.

Integration

A connection that lets one system read from or write to another.

Model Context Protocol

An open standard for connecting AI agents to business tools and data.

Orchestration

Coordination of steps or agents so work arrives in order and nothing is dropped.

Hallucination

A confident answer that gets the facts wrong.

Prompt

Instructions written once, tested and then reused by an automation.

API

A defined way for another system to connect to software safely.

Knowledge base

Documents indexed so AI can retrieve and cite relevant information before it answers.

Human in the loop

A person reviews or approves a step before the work continues.

Evals

Tests that score AI output against examples of good work.

Trigger

The event that starts a workflow: an email, a form, a record or a set time.

Webhook

A message one system sends another when an event happens.

Tool

An action an agent can take, such as looking up an order or drafting a reply.

Guardrails

Limits the system enforces on what AI can see, say and do.

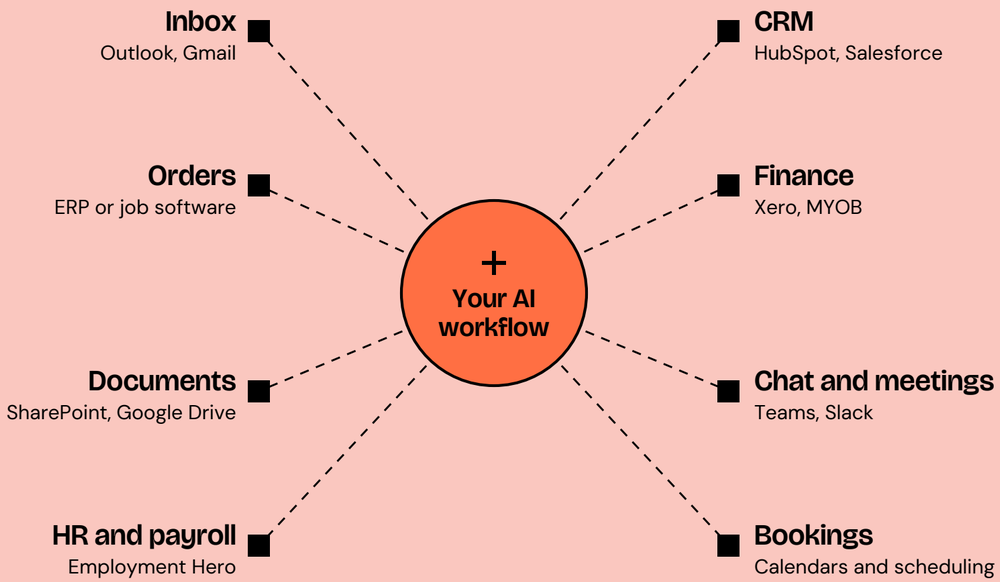
Tokens

Small pieces of text that AI models process and that vendors often use for pricing.

What your AI can reach matters.

A separate browser tab waits for someone to copy work in and out. Connected AI acts where the work happens.

Systems you can connect



Four ways to connect

01 · Ready-made connectors

Built into tools such as Zapier, n8n or Power Automate.

02 · APIs

Direct, flexible connections to a system's data.

03 · Webhooks

Instant alerts that start work when something changes.

04 · MCP servers

A way for agents to use systems as tools within set permissions.

ACCESS RULES Give each automation a login. Start read-only, add one write action at a time and log everything.

Where AI automation earns its keep.

Examples by team and the automation level that usually fits.

Sales and marketing	02 Sort enquiries and draft replies.	03 Research leads before calls.	01 Update CRM and set reminders.
Customer service	02 Tag, route and summarise tickets.	03 Answer live delivery questions.	01 Send feedback requests.
Operations	02 Read purchase orders into your system.	02 Prepare quotes from price lists.	03 Chase suppliers. Update schedules.
People and HR	01 Set up accounts. Book inductions.	02 Draft job descriptions and interview summaries.	03 Answer staff policy questions.
Finance and admin	01 Send reminders. Route approvals.	02 Suggest invoice and expense codes.	02 Draft month-end packs for sign-off.

THE PATTERN Look for frequent work that follows a pattern and has people reading, retyping, copying or chasing.

Five steps before you build.

Get one real job ready for a trial. Keep the workflow owner involved from the first walkthrough.

01

Pick the work

List the repeatable tasks that take time each week and who does them.

Work inventory · 17

02

Map the job

Use a real example. Note each system, handover and unusual case.

Workflow map · 19

03

Check the inputs

Find out where information comes from. Check that the inputs can be accessed safely.

04

Set human checks

Mark the steps that need review and the actions AI cannot take alone.

05

Agree the measure

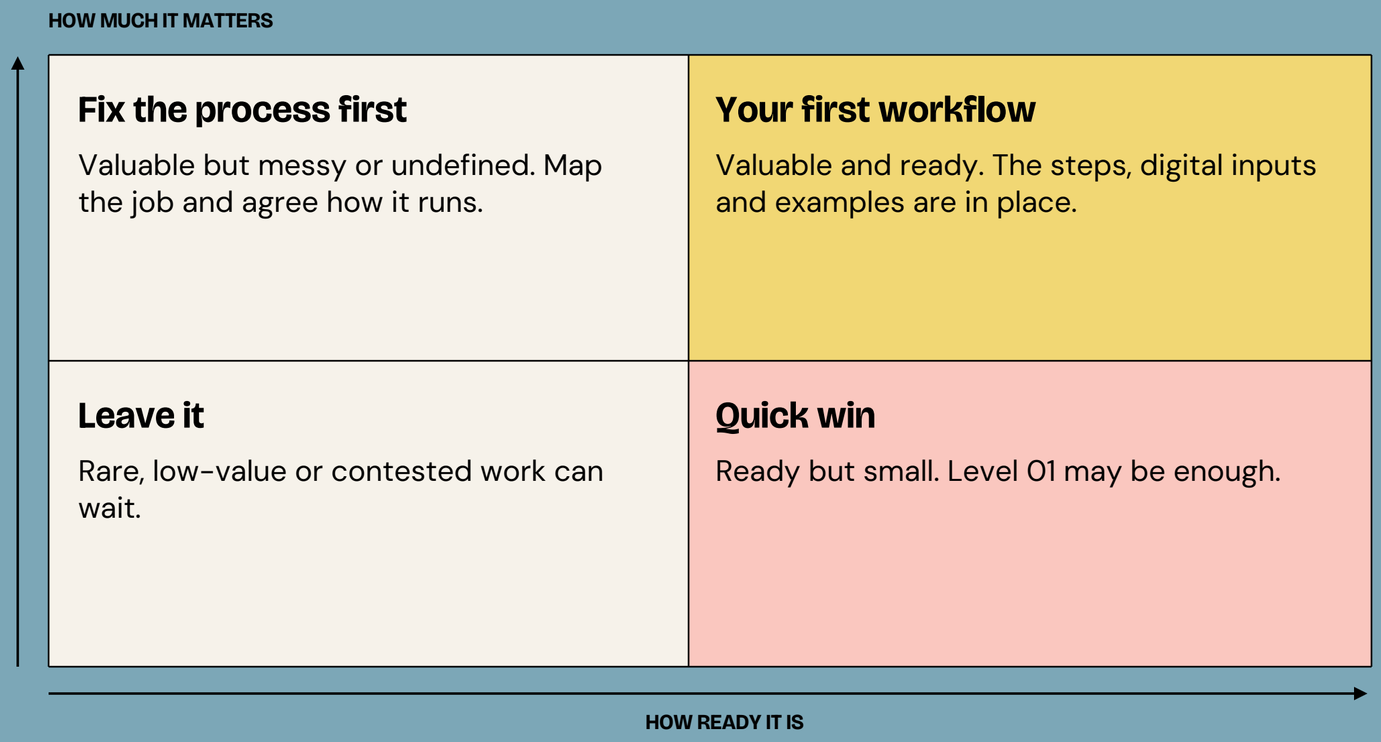
Choose a baseline for time per item, turnaround or errors before you change the work.

Scorecard · 18

READY TO BUILD Name an owner, map the process, check integrations and gather 20–50 examples of good output.

Picking the right work.

Compare how much work matters with how ready it is. A strong first workflow scores well on both.



Signs of a strong first workflow

+ It happens daily or weekly.
+ The work follows a recognisable pattern.
+ People spend time retyping, reading or chasing.
+ Inputs arrive in a digital format.
+ A person can catch mistakes and own the work.

LEAVE FOR LATER

Set aside rare, disputed or relationship-heavy work and jobs with costly, irreversible mistakes.

Five ways AI projects stall.

Spot these problems early. Before you sign with a partner, ask how they'll build and run the workflow.

01 **Starting with the tool**

Start with a real job before buying licences.

02 **Waiting for someone to ask**

Build the workflow into the tools people already use.

03 **Leaving systems disconnected**

Connect the systems that people have to copy work between.

04 **Nobody owns it**

Name someone to check accuracy, cost and performance.

05 **Jumping to agents**

Prove the value of simpler steps before adding complexity.

BEFORE YOU SIGN

Questions for your AI partner

01 Which of our systems will it connect to, and how?

02 What happens when it gets something wrong?

03 Who checks the output, and how often?

04 What will it cost to build and run each month?

05 How will we know it is working?

06 Who supports and improves it after go-live?

07 Can we see what it did and why?

08 Where is our data stored and processed?

WORKED TEMPLATE 1

Work inventory.

List the work one team repeats. Calculate the weekly hours and sort by that figure.

HOURS A WEEK

Times a week × minutes each ÷ 60.

YOUR SHORTLIST

Carry the five highest-effort jobs into your first review.

TASK	WHO DOES IT	RUNS / WK	MINUTES PER ITEM	HOURS/WK	SYSTEMS USED	HOW IT ARRIVES	JUDGEMENT NEEDED
Send booking confirmations	Dispatch	90	8	12	CRM, SMS	Job record	Low
Follow up open quotes	Sales support	60	10	10	CRM, email	Open quote	Medium
Triage after-hours calls	Duty team	120	4	8	Telephony, CRM	Phone call	Medium
Check supplier invoices	Accounts	30	12	6	ERP, email	PDF invoice	High
Update job status	Dispatch	40	6	4	CRM, mobile	Job update	Low
Draft renewal reminders	Account team	18	10	3	CRM, email	Renewal date	Medium
Chase missing job photos	Field support	15	8	2	CRM, mobile	Missing upload	Low

WORKED TEMPLATE 2

Scorecard.

Take three candidates from the inventory. Score them on the same 1–5 scale.

28–35	Strong first workflow.
20–27	Improve the lowest scores first.
7–19	Park it or map it in more detail.

Use the decision tree on page 10 to choose the simplest level.

CRITERION	CANDIDATE 01	CANDIDATE 02	CANDIDATE 03
WORKFLOW NAME Name the work you are comparing.	Booking confirmations	Quote follow-up	After-hours triage
VOLUME 1 = monthly. 5 = many times daily.	5	4	5
TIME PER ITEM 1 = minutes. 5 = hours.	3	3	2
REPEATABILITY Does it follow the same pattern?	5	4	4
DIGITAL INPUTS Is the information available in digital formats?	5	5	4
CLEAR GOOD OUTPUT Can you show what good work looks like?	5	4	4
EASY TO CHECK Can a person catch errors before they go out?	4	4	3
CLEAR OWNER Will one person judge the results?	5	4	5
TOTAL Out of 35.	32	28	27

WORKED TEMPLATE 3

Workflow map.

Map one workflow as it runs today. Use the result to brief the person who will build it.

START WITH ONE CASE

Walk through the last real example with the person who did the work.

NOTE THE HANDOVERS

Mark where work waits, where mistakes happen and who can step in.

Workflow and owner

Booking confirmations · Dana Lee, Dispatch

Trigger

What starts the work?

Dispatcher marks a job as confirmed.

Inputs

What information arrives?

Job ID, contact, time window and address.

Systems used

CRM job record, approved SMS tool and Dispatch queue

Steps today

Who does what, and in which order?

01 *Open the confirmed job in the CRM.*

02 *Check name, contact and service window.*

03 *Pick the approved SMS template.*

04 *Insert the job details and check the preview.*

05 *Send once and log the delivery status.*

06 *Route failed deliveries to Dispatch.*

Done looks like

What makes the result usable?

One confirmation reaches the right customer. CRM records the send.

Human checks

Where must a person check?

A dispatcher checks changes to the address, timing or contact before sending.

Exceptions

What goes wrong and how often?

Missing number call from Dispatch. Changed address verify with the customer. Duplicate job ID hold the send.

Measure

Today's result and your target.

12 admin hours/week today. Target 5 hours/week. No incorrect confirmations.

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.

www.sparkfactory.ai

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