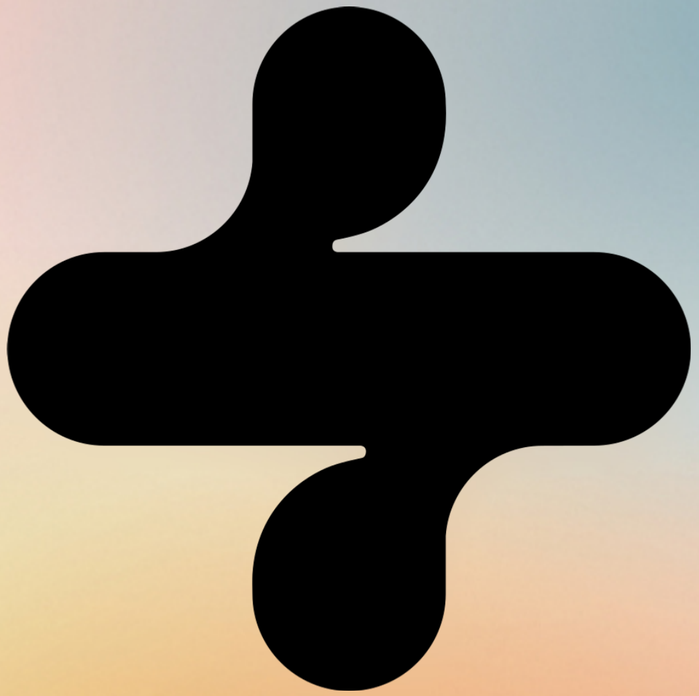
FREE GUIDE · 2026 EDITION

# 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.


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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.

spark(factory)

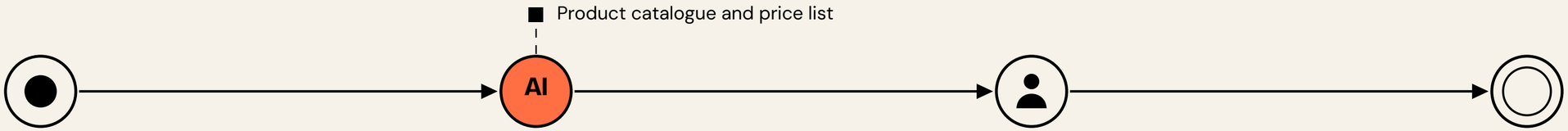
# From an emailed order to a draft sales order.

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.

spark(factory)

WORKFLOW CANVAS

# Map one workflow.

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

TYPE IN THE PDF OR PRINT AND WRITE

**WORKFLOW NAME**

**PROCESS OWNER**

**SCOPE AND OUTCOME**

**TRIGGER**

**INPUTS AND SOURCES**

**OUTPUT AND RECIPIENT**

## Trace the major steps.

Name the person or tool doing each step.

| STEP | WHAT HAPPENS? | WHO DOES IT? | DECISION OR HANDOVER |
|---|---|---|---|
| 01 | | | |
| 02 | | | |
| 03 | | | |
| 04 | | | |

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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.

TYPE IN THE PDF OR PRINT AND WRITE

## WHAT WILL YOU TRIAL?

## PEOPLE AND RESPONSIBILITIES

## QUALITY STANDARD

## HOW WILL YOU CHECK?

## WHEN MUST A PERSON STEP IN?

## PRIVACY, CONSENT AND COMPLIANCE

## REVIEW DATE

## DECISION OWNER

## DECISION

# 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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