05 / THE APPROACH THE WORKFLOW THESIS

AI is horizontal. Your org chart is vertical.

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A customer does not experience your org chart. They experience the answer, the delay and whether the next person knows what was agreed.

That is a useful starting point for AI implementation. Instead of asking what each department could automate, follow one piece of work from the customer's request to the outcome. The opportunity may sit between teams.

A faster task can still leave a slow workflow

Consider a customer asking for a revised quote with a different package and payment schedule. This is an illustrative workflow, not a reported client result.

Sales captures the request. Finance checks the commercial terms. Operations confirms what can be delivered. Sales then assembles the answer and sends it back.

An AI assistant could write the email in seconds. But if Finance is reviewing an old version, Operations is missing the promised start date and Sales is chasing both in separate threads, the customer still waits.

The work worth changing is not just the email. It is how the request becomes a complete, approved commitment.

01
Follow one customer request

02
Design the handoffs

03
Measure the whole journey

05 / THE APPROACH ONE SHARED RECORD

Design the handoffs around one shared record

Start by defining what each team needs to make its decision. Then test a shared commitment record that travels with the request. AI can help prepare and update it from approved sources; the responsible people still approve the terms and commitments.

Stage	What needs to travel with the work	Decision owner
Sales captures the request	Customer objective, requested package, proposed terms and source conversation	Seller confirms the request is accurate
Finance reviews the terms	Current quote version, payment schedule, applicable policy and exceptions	Finance approves or returns a specific question
Operations checks delivery	Agreed scope, dependencies, proposed start date and unresolved commitments	Operations confirms feasibility
Sales responds	Approved terms, delivery position, open questions and the next customer action	Seller reviews and sends the response

This does not require replacing every system. The record could live in the CRM or another agreed workspace. What matters is that the teams use the same current information and know when the work is theirs.

05 / THE APPROACH REDESIGN & MEASUREMENT

Remove work before automating it

Ask which steps exist only because information arrives incomplete. Could the original request include what Finance needs? Could Operations see it before a date is promised? Which approval is genuinely necessary, and which merely compensates for an unreliable handoff?

Agree those changes with the owners before building. Otherwise, automation can move incomplete work around faster without making the outcome better.

Measure the whole journey

Time one recent request from arrival to an approved customer response. Separate hands-on effort from time spent waiting. Record clarification loops and corrections as well as elapsed time.

Test the redesigned workflow against comparable requests. Check whether it reduces waiting and rework without weakening review quality. Then decide what the returned capacity enables: more proposals handled, faster answers or attention to opportunities the team previously could not pursue.

Use your own baseline. A faster draft is useful, but it is not evidence that the customer received a better answer sooner.

Elapsed time

Arrival to an approved customer response.

Hands-on effort

Separate active work from waiting.

Rework

Record clarification loops and corrections.

05 / THE APPROACH TEAM WORKSHEET

Take this into the next team conversation

Choose one recent customer request and complete this record together:

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Customer outcome:
Where the request started:
Teams it crossed:
Information each team needed:
Where it waited, and why:
Questions asked more than once:
Approvals that must remain human:
One step to remove or redesign:
Owner of the end-to-end workflow:
Baseline: elapsed time, hands-on effort, corrections
First test and review date:
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If someone already leads AI, this gives them a bounded implementation opportunity. If nobody does, it gives leadership a concrete place to establish ownership.

Start with one workflow. Use what it teaches you to change the next one.

05 / WORKFLOW MAP PUT THE ARTICLE TO WORK

One request. One current record.

Illustrative revised-quote workflow: the record travels with the work while people approve the commitments.

01

Sales captures the customer request

Record objective, requested package, proposed terms and source conversation. The seller confirms accuracy.

02

Finance reviews the current version

Carry the quote, payment schedule, policy and exceptions.

Finance approves or returns a specific question. Resolve it in the shared record.

03

Operations checks delivery

Carry scope, dependencies, proposed start date and unresolved commitments. Operations confirms feasibility.

04

Sales reviews and responds

Use approved terms, delivery position and open questions. State the next customer action.

The seller reviews and sends the response.

05

Review the end-to-end result

Compare similar requests. Track elapsed time, hands-on effort, waiting, clarification loops and corrections.

BEFORE AUTOMATING	KEEP HUMAN APPROVAL
Remove or redesign steps caused by incomplete information. Agree changes with the owners.	AI prepares and updates the record from approved sources. Responsible people approve terms and commitments.

Workflow synthesis based on this article. Read alongside the full examples and qualifications.