How AI workflow integration works: a plain-English guide for small businesses

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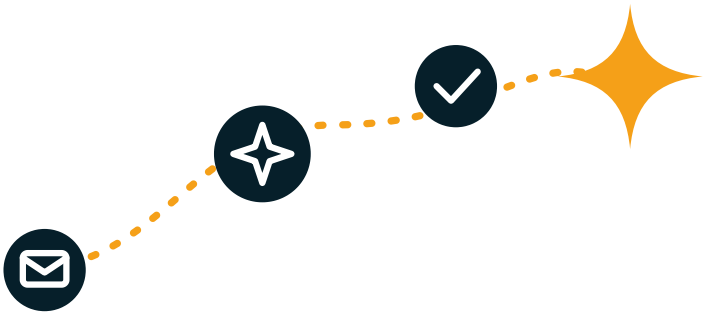
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AI, explained for *the business you actually run.*

Read on and you'll understand what an AI workflow would do in your business, how it fits the software you already use, what it costs to run and where you stay in control, without the jargon.

YOU WILL COME AWAY WITH

- What it is, and what it isn't
- How it fits your existing software
- A checklist: is your job ready?



How AI workflow integration works: *a plain-English guide for small businesses*

What an AI workflow actually is, how it connects to the software you already use, where people stay in control, what it costs to run, and how a build goes from first call to sign-off.

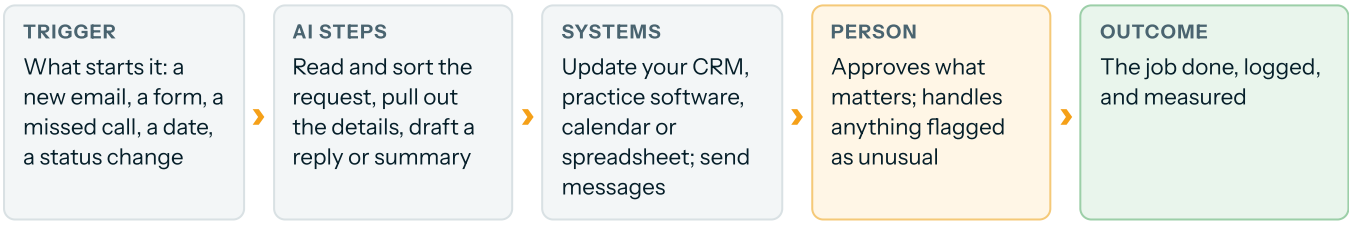
In one line: an AI workflow is a set of steps your business already does, written down once and run automatically, with AI handling the reading, sorting and drafting, and a person checking whatever matters.

1. What an AI workflow is (and isn't)

It is one job, done the same way every time: something arrives (an email, a form, a missed call), the workflow works out what it is, pulls out the details, does the routine steps in your systems, drafts any reply, and passes anything uncertain or important to a person.

It isn't a chatbot you have to talk to, a new system to move into, or AI making decisions on its own. Most of a workflow is ordinary rules ("if this, do that"); the AI is used only for the parts that need reading or writing.

2. The building blocks



Block	What it does	Example
Trigger	Starts the workflow when something happens, or on a schedule.	A portal enquiry arrives; it's the first of the month.
Read and sort	AI works out what a message or document is and how urgent it is.	Maintenance request: urgent, routine or cosmetic.
Extract	AI pulls the details out of free text, attachments or photos.	Budget, move date and pets from an enquiry.
Rules	Ordinary logic decides what happens next. No AI needed.	If documents are complete, stop chasing.
Draft	AI writes a first draft from your templates and the details.	A quote, a reminder, a progress update.
Act in your systems	The workflow updates records and sends messages through the connections your software allows.	Add the lead to the CRM; offer a viewing slot.
Check	A person approves where you've chosen to have a checkpoint.	Every quote waits for the owner's approval.
Log and measure	Everything is recorded, so you can see what it did and how long the job now takes.	A weekly summary of what was handled.

3. What AI is good at, and what it isn't

Good at

- Reading messages and documents and saying what they are
- Pulling details out of messy text, emails and forms
- Drafting routine messages in your tone, from your templates
- Summarising notes, threads and meetings
- Doing the same thing consistently, at any hour

Not to be trusted with alone

- Professional advice and judgement (legal, tax, payroll, HR)
- Pricing jobs or making promises on your behalf
- Identity, compliance or credit decisions
- Complaints, disputes and anything sensitive
- Facts it hasn't been given: it should flag, not guess

That's why we design every workflow so the AI does the reading and drafting, ordinary rules do the routine steps, and a person handles judgement.

4. How it connects to your software

We build around what you already use. There are three common ways in, and we check which your software supports on the discovery call, before you commit:

1. **The software's own connections.** Many CRMs, practice, property and job management systems, and Microsoft 365 or Google Workspace, let approved tools read and update records. This is the cleanest route.
2. **An automation service.** Where systems don't talk to each other directly, a reputable automation service links them. Any subscription it needs is billed to you by the provider, and we tell you the cost first.
3. **Email, forms and calendars.** When a system has no connection at all, the workflow can still work through the inbox, a web form and the diary.

Not every system allows every kind of connection. If yours doesn't allow what a workflow needs, we say so and suggest an alternative rather than building something fragile.

5. How people stay in control

- **Checkpoints you choose.** Anything going to a client, tenant or customer can wait for approval. Many owners approve everything at first, then relax the checks once they trust it.
- **Flags, not guesses.** When something is unusual, uncertain or sensitive, the workflow passes it to a person instead of answering.
- **A clear record.** Every action is logged, so you can see what happened and why.
- **You own it.** It's set up in your own accounts and keeps running in your business, with a plain-English guide for your team.

6. Your data and security

- **Your systems, your access.** We work through access you set up for us and can remove at any time; it's removed at handover unless you choose a care plan.
- **Only what's needed.** Each workflow handles only the information its job requires.
- **In writing first.** Before we start, we tell you which AI services the workflow uses and how data is handled, and we put a short data processing agreement in place before touching personal data.
- **Your obligations stay yours.** Regulated firms can check the design against their own policies; we document how it works so you can show your compliance lead or insurer.

7. What it costs to run

A workflow may rely on one or two services with their own monthly fees: an AI service, an automation service, or a software plan that allows connections. These are billed to you by the providers, not marked up by us. Before you commit, the proposal states the expected monthly running cost. Many small workflows run on modest monthly fees; we'll give you the figure for yours, not a guess.

8. How a build goes

Stage	What happens	When
Find	The free score or a 20-minute call identifies the job costing most time; we put hours and a cost on it.	Before you commit
Agree	A short proposal sets out the scope, the sign-off points, the price and the running costs.	Within 48 hours of the call
Build	Kick-off call, then we build and test privately on copies of real cases.	Days 1 to 7
Trial	Live, with a person approving every output; we adjust.	Days 8 to 12
Sign off	You check it against the agreed points, get the guide, and only then pay the balance.	Day 13 or 14

We record how long the job takes the week before and the week after, so you can see the real difference.

9. After launch

Software changes and businesses change. A Quick Win includes 30 days of fixes after sign-off. After that, an optional care plan covers monitoring, fixes and small changes, and can add a new workflow each quarter. You can also simply run it yourselves using the guide.

10. Is your job ready for a workflow?

Question	Yes / No
Does it happen every week, or many times a month?	
Does it follow the same steps most of the time?	
Does it live in email, forms, a calendar, a CRM or practice software, or spreadsheets?	
Could a person check the output before it matters?	
Would getting it off your desk free real time each month?	

Four or five yeses usually means it's a good first workflow.

Find your first workflow

Take the free AI Readiness Score at **claromai.com** (three minutes, a report checked by a person), or book a free 20-minute call · 020 8064 0269 · hello@claromai.com

Quick Win build £1,500 fixed; AI Opportunity Assessment £495; larger builds £2,000–£5,000; care plans from £150 a month. Prices exclude VAT. Any time savings are estimates, not guaranteed results.

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