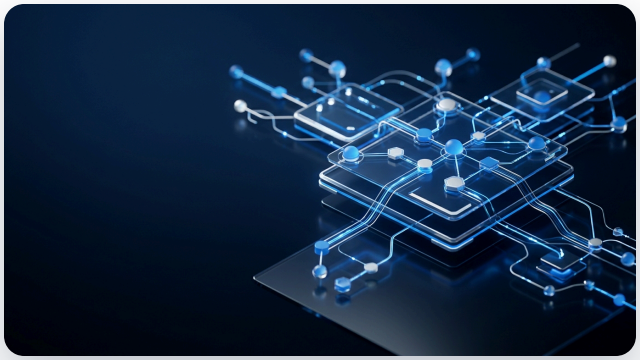
AI Conexio
CONNECT. AUTOMATE. TRANSFORM.

CAPABILITIES BRIEF

From AI ambition to operating value

The hard part is not finding another AI tool. It is deciding which workflow should change first, who owns the result, and what evidence would justify scaling it.



FOR LEADERS MOVING BEYOND EXPERIMENTATION

We do not sell tools, models, or a multi-year transformation program. We take one high-value workflow from executive intent to governed, measured operating use, then prove the result before you spend to scale it. Most AI efforts stall because priorities, readiness, workflow design, governance, and adoption are run as separate workstreams. We connect them into a single path.

Choose Where AI Creates Value

Prioritize use cases, sequence investment, and align leaders around the operating outcomes that matter.

Prepare the Operating Layer

Assess data, systems, permissions, process, and governance before a pilot creates new risk.

Move From Pilot to Use

Integrate the workflow, enable the people who use it, and measure adoption, quality, risk, and value.

THE LEADERSHIP QUESTION

Which workflow should change first, what must be ready before it does, and how will leadership know the change created value?

The AI Execution Gap Is Now an Operating Problem

Most leadership teams do not need more AI excitement. They need a credible path to make one real workflow better without creating new risk, tool sprawl, or adoption debt.

Tools appear before ownership

Teams test AI before anyone has defined who owns the workflow, approves outputs, or measures whether the work improved.

Pilots never transfer

A pilot works in a narrow setting, then stalls because there is no operating model for support, governance, data access, or training.

Shadow AI hides the demand

Employees already use AI to solve daily friction, but leadership cannot see which workflows are driving the workaround.

Governance lives outside the work

Policies exist, but the actual workflow gives people no practical way to follow them when time pressure hits.

WHAT THE GAP COSTS THE BUSINESS

Senior Capacity Drain

Manual search, drafting, routing, and rework keep absorbing senior time.

Data Risk Exposure

Sensitive data flows through unmanaged tools with no review or audit trail.

Tool Sprawl

Isolated tools with no shared owner, standard, or measure of value.

THE IMPLICATION

The next phase of AI implementation is not about who has tried the most tools. It is about who can turn AI into governed, measurable workflows that people actually use.

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Four Decisions Determine Whether AI Creates Value

A use case becomes an operating capability only when workflow, owner, context, and measure are clear before the pilot begins.

Choose the workflow

Is the work visible, repetitive, and painful enough to improve? Start where a better process would matter to the business.

Name the owner

Who owns the operating result, review rules, exceptions, and adoption after the pilot leaves the lab?

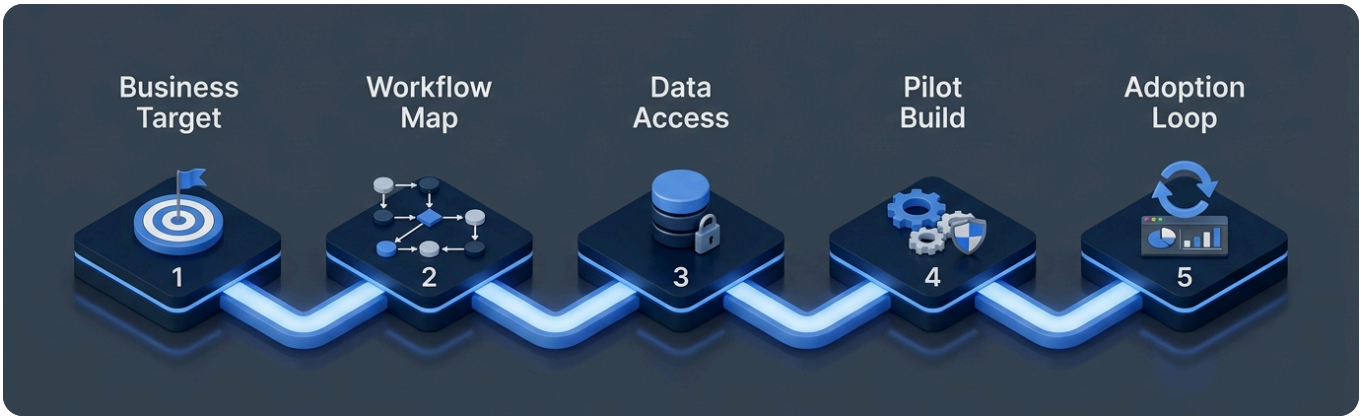
Prepare the context

Which systems, data, permissions, integrations, and governance controls must be ready for reliable use?

Define the proof

Which measures will show whether the workflow improved in value, quality, cycle time, adoption, and risk?

THE AI CONEXIO METHOD: A PRACTICAL PATH TO A DECISION



1 Business Target

Define the operating outcome, owner, affected team, and success metric.

2 Workflow Map

Trace the current process, handoffs, exceptions, and decision points.

3 Data Access

Identify systems, documents, permissions, privacy rules, and integration needs.

4 Pilot Build

Stand up the smallest useful workflow with controls, review, and fallback.

5 Adoption Loop

Measure usage, quality, time saved, risk, and the next workflow to scale.

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Three Workflow Patterns Worth Testing

The right starting point is a workflow with visible friction, a willing owner, and a measurable outcome. Targets are illustrative and set with the owner before a pilot, for example 25% to 40% less cycle time, or eight to twelve hours a week returned to a team.

INTERNAL KNOWLEDGE AND DECISION SUPPORT

For teams losing time searching policies, contracts, sales notes, SOPs, support history, or technical documentation.

Connect approved document sources	Set access and citation rules	Deploy assistant inside the workflow	Measure answer quality and time saved

Typical target: 30% to 50% faster time to answer, with cited sources.

OPERATIONS AND BACK-OFFICE AUTOMATION

For repeatable intake, review, routing, reconciliation, reporting, and exception-handling work.

Map trigger and inputs	Classify work and risk level	Route actions for human approval	Track cycle time and error rate

Typical target: 25% to 40% lower cycle time and senior capacity returned weekly.

SALES, SERVICE, AND CUSTOMER ENABLEMENT

For teams that need faster follow-up, better handoffs, cleaner notes, and consistent customer-facing answers.

Pull CRM and interaction context	Generate next-best actions	Review, approve, and send	Measure conversion and response quality

Typical target: faster first response, cleaner handoffs, and higher conversion.

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Every Workflow Reuses the Same Six Layers

The model is only one layer. Durable operating value comes from assembling all six, so each new workflow starts from a proven pattern instead of a blank page.

Business Owner

Accountability for the outcome and workflow rules.

Workflow Map

Current state, target state, handoffs, and exceptions.

Data Access

Approved sources, permissions, privacy, and retention.

AI Layer

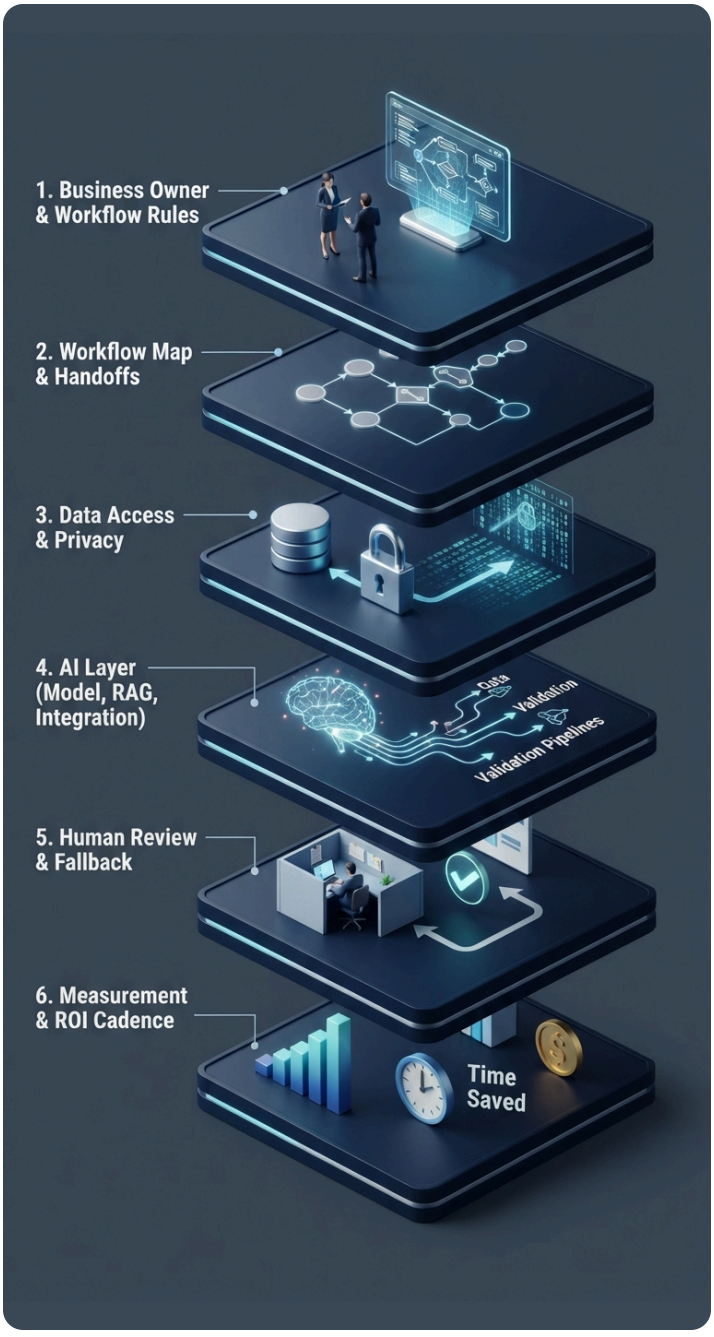
Model, retrieval, prompts, integrations, and validation.

Human Review

Approval rules, escalation paths, and fallback process.

Measurement

Adoption, quality, time saved, risk, and ROI cadence.



Trusted AI Starts With the Operating Layer

The experience should feel easy. What makes a workflow trustworthy sits underneath it: grounded context, controlled access, and measured adoption, all built on a governed operating layer.

GOVERNED OPERATING VALUE

Faster, safer, measurable workflows leadership can scale.

GROUNDED

Grounded in business context

Outputs come from approved documents, systems, and records, not a generic model response.

Cites sources, admits limits

Points to source material, exposes confidence boundaries, and routes uncertainty to a person.

VERIFICATION

Zero out-of-bounds responses across the acceptance test set.

Risk mitigated: model hallucination

CONTROLLED

Respects permissions

Access strictly mirrors existing role, team, and system data policies, ensuring zero bypass of corporate security boundaries.

Keeps humans in the loop

High-risk, regulated, or customer-facing actions are drafted by AI and approved by people.

VERIFICATION

Audit log capturing 100% of data-access calls and human approval stamps.

Risk mitigated: data leakage and unauthorized access

ADOPTED

Meets people where they work

AI appears inside approved tools and channels, not a separate disconnected portal.

Measured on operating value

Tracks adoption, quality, cycle time, and risk events, not vanity usage metrics.

VERIFICATION

Active daily use above 80% of the target team by week two.

Risk mitigated: platform abandonment and tool sprawl

THE OPERATING LAYER

Approved data, systems, process, and controls.

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A Clear Path From Assessment to Implementation

Engagements are designed to give executives a clear decision path, reduce implementation risk, and create early wins that can scale into a durable AI operating model.

1 **Diagnose**

Assess business goals, workflows, data readiness, governance maturity, and opportunity areas.

2 **Design**

Prioritize use cases, define target workflows, create success metrics, and select architecture or vendors.

3 **Deploy**

Support pilots and implementation plans with workflow integration, enablement, controls, and measurement.

4 **Scale**

Expand what works through operating cadence, governance, adoption tracking, and ongoing roadmap refinement.

WHAT THE FIRST ENGAGEMENT PRODUCES

- ✓ Up to three candidate workflows, ranked by value, effort, and risk.
- ✓ One recommended workflow with a named business owner.
- ✓ AI fit, value, readiness, and risk assessment.
- ✓ Pilot scope with human-review and governance requirements.
- ✓ Success measures and expansion decision criteria.

BEST FIT

- ✓ Leadership has AI interest, active pilots, or shadow AI already in motion.
- ✓ The business needs implementation clarity before buying another tool.
- ✓ A team needs one workflow moved from idea to governed operating use.

WHAT CLIENTS BRING

- ✓ A business owner willing to sponsor one workflow.
- ✓ Access to the people and systems closest to the work.
- ✓ Willingness to measure value, quality, adoption, and risk.

NEXT STEP

Book the Workflow Value Diagnostic: a two-week, fixed-fee engagement that ranks your top workflow candidates, recommends one, and defines the shortest path to a governed pilot. The fee is credited toward the pilot build if you proceed.

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Start With One Workflow, Not a Large Transformation Program

The first engagement should reduce uncertainty, not create a large transformation commitment before the business knows what will work.

WORKFLOW VALUE DIAGNOSTIC

A fixed-scope engagement, two weeks, for a single fixed fee agreed up front. We surface up to three candidate workflows, rank them by value, effort, and risk, and recommend one, then hand you a build-ready blueprint for it and a clear go or no-go. It delivers the plan and the decision, not a deployed system. The fee is credited toward the pilot build if you commission it within 60 days.

WHAT YOU LEAVE WITH

- ✓ Up to three candidate workflows, ranked by value, effort, and risk.
- ✓ Current-state and target-state map of the recommended workflow.
- ✓ AI fit, value, and risk assessment with a named owner.
- ✓ Pilot scope, success measures, governance controls, and sequence.
- ✓ A go or no-go recommendation, and what building the pilot would take.

THREE STEPS TO A DECISION

1. **Pick one workflow.** Choose work that is visible, repetitive enough to improve, and painful enough that the team wants change.
2. **Map value, effort, and risk.** Clarify data access, human review, compliance needs, integration complexity, and expected impact.
3. **Scope the pilot.** Define the smallest useful implementation, success measures, rollout path, and expansion decision.

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START WITH ONE WORKFLOW THIS QUARTER

If a critical workflow is under operational pressure, book the Workflow Value Diagnostic to secure your roadmap: two weeks, one fixed fee, and a build-ready pilot plan you keep whether or not you build with us. No company-wide AI roadmap is required to begin.

Eric Garza, Founder, AI Conexio

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