KYZNFLOW
AI WORKFLOW AUTOMATION

Five questions to ask before anyone builds you an AI system

Ryan | 23 November 2026

These are the five questions to ask anyone who builds you an AI system, inside your company or outside it. Each comes with our answer and examples from sales, research and membership work. A founder can't inspect the build, but the answers show quickly whether the builder has thought past the first version.



1 Which processes shouldn't be automated with AI?

Very few. In our experience almost any process can be automated, however complex, as long as the judgement sits in the right places and a person takes over where they're needed.

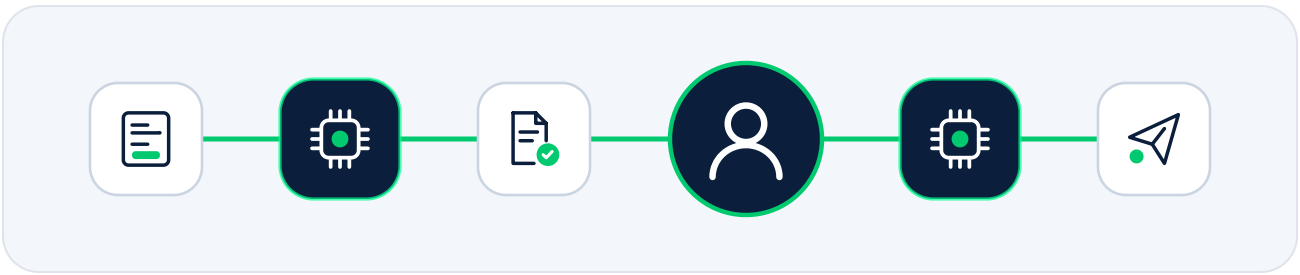
There are three cases where we'd hold back:

A process that only runs a few times a year. For something like an annual pricing review, we'd recommend a Claude project with your relevant documents uploaded, once you've checked they contain no sensitive or private data. You can chat with that project each year when you need to. But if your pricing changes more often, and each change has to be rolled out across employee comms, your website and Stripe, that might warrant an AI system.

The relationship itself. It's best to keep your own people on the conversations a client is really paying for, such as a renewal negotiation, because that's where trust is won or lost. Klarna learned this in public. Service got worse once an AI assistant was answering the bulk of its customer chats, by its chief executive's own account to Bloomberg in 2025, and the recruiting of human support staff started again.

The final call when money or reputation is on the line. Our advice is to let AI do the reading and the first pass and leave the last word to a named person, because AI gives a confident answer even when the evidence is thin. Anthropic's legal team runs its contract redlining and marketing reviews this way, with Claude on the first pass and a lawyer's sign-off required at the end.

In the last two cases, we'd still automate everything around the part a person keeps.



Example: How we'd set up a client renewal system

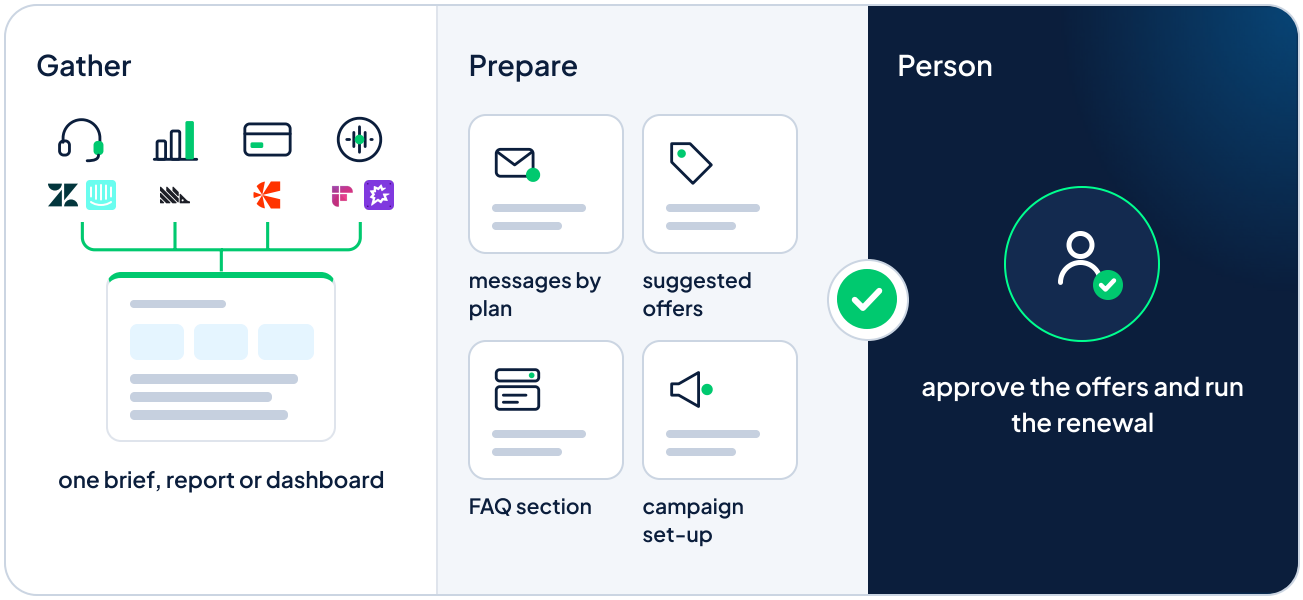
First, the system gathers what your account lead needs:

- pulls the client's open tickets from Zendesk or Intercom
- pulls their product usage for the last 90 days from PostHog or Mixpanel
- pulls their payment history from Chargebee or Recurly
- adds the notes from their last three calls in Fireflies or Gong
- **puts it all into a one-page brief, a report or a dashboard**

Then it prepares the renewal itself:

- drafts the renewal messages for each customer, written for the plan they're on
- suggests a renewal offer for each account, ready for your account lead to approve
- writes an FAQ section that answers the questions customers on each plan ask most
- sets up the renewal campaign in Customer.io or ActiveCampaign

Your account lead approves the offers and still runs the renewal. They go into it knowing which tickets are open and that usage dropped last month. What to offer and when to hold the price is still theirs to decide, and they decide better with all of that in front of them.



The system prepares the renewal. Your account lead approves it and runs it.

Can cold email be automated with AI?

Well, sort of. It can be automated, and when it's done poorly it probably does your company more harm than good. Done poorly means:

- fake personalisation, like "Congrats on the funding round"
- one signal treated as a reason to email
- no check on whether the person is already a customer

Gartner put the question to 632 B2B buyers in 2024. Irrelevant outreach was enough for 73% of them to steer clear of the supplier who sent it. One of its analysts, Robert Blaisdell, put it more bluntly: "Bad prospecting actively damages relationships with potential customers."

We'd automate the research, the checks and the sorting, and keep a person on two things: which signals mean something for this buyer, and what goes out under your name. That's why the same AI gets one company ignored and another one answered.

What to listen for when you ask an agency this question

The answer you want names the part they'd leave with a person, says why, and says what they'd build around it. "We can automate anything" tells you nobody has looked at where human logic is still needed.

2 How do you know when an AI system has stopped working?

Often nobody finds out an AI system has stopped working unless it was built to report it. n8n, for example, sends its error alert when a run fails, but the most expensive stops never produce a failed run. In England in 2020, the automated process that loaded positive Covid test results from commercial labs left out 15,841 cases between 25 September and 2 October. It saved each lab's results in an old Excel format that holds about 65,000 rows, and every record past that limit was dropped without an error. Public Health England found the gap eight days after it started, and by then nearly 50,000 close contacts who should have been told to self-isolate hadn't been.

Three ways an AI system stops working

It stops running. For example, take an AI workflow that starts with a demo request on a Typeform form and hands each enquiry to AI, which researches the company, scores the fit and books the meeting with the right salesperson in Salesforce, HubSpot or Attio. If the system's address answers "not found" even once, say while the workflow is paused for a few minutes, Typeform's rules are to switch the connection off at once, with no retry. From then on no request reaches the system, so no run fails and no alert goes out.

It runs with nothing to do. Each night a research workflow prepares briefings on the next 20 accounts from a target list. The list ran out a fortnight ago, and the sales team put the empty mornings down to a slow month.

It runs and gets it wrong. Every Monday a system reads five competitors' pricing pages and AI summarises what changed. One competitor redesigns its site, the system can't read the new page, and the AI reports no pricing changes this week. The summary arrives on time.

The model itself can get worse too. Three bugs degraded Claude's answers for some users from August to early September 2025, and Anthropic's own postmortem says its tests "simply didn't capture the degradation users were reporting." If the maker needed weeks to confirm it, a small team won't spot it by reading the outputs.

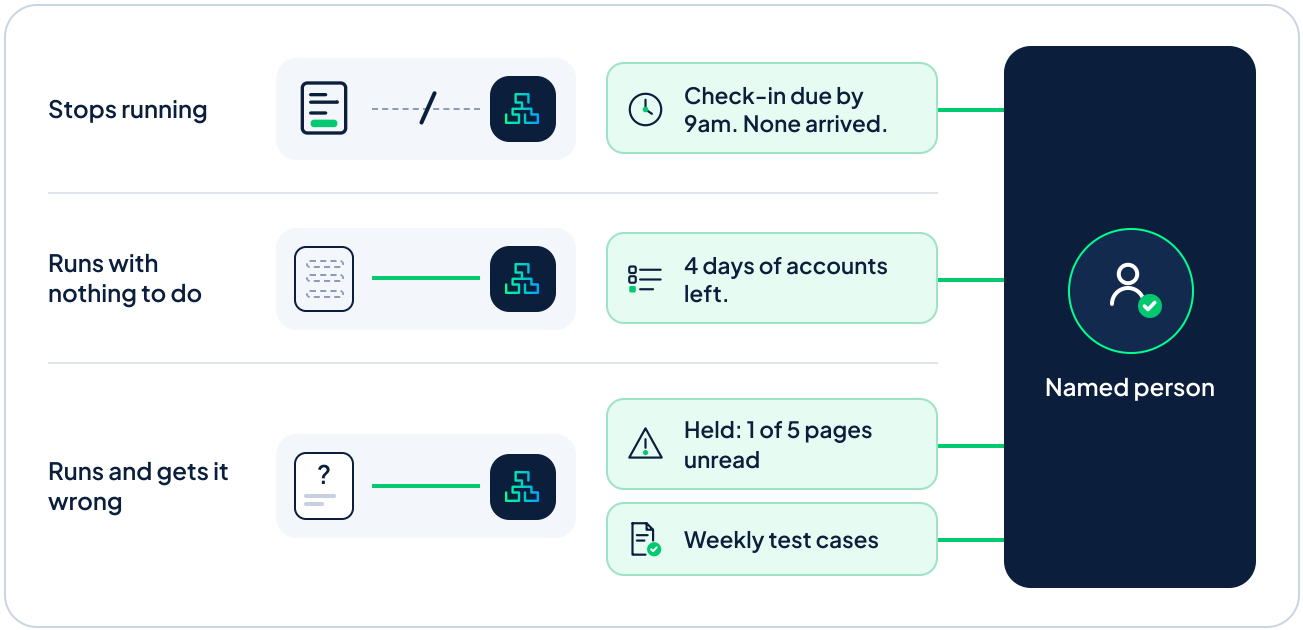
What checks does an AI system need?

We'd build at least three checks into every system, so the people who own it hear about a problem before their customers do:

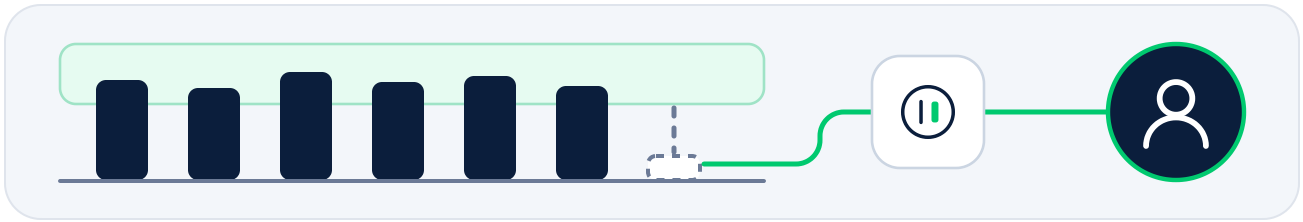
A check-in that lives outside the system. Each run checks in when its work is done, and if that check-in is late, a named person is told. It has to sit outside, because a system can't announce a run that never happened.

A normal range for every run. The research workflow expects 20 briefings, and the pricing monitor expects to read all five pages. A zero, or a big fall against last week, holds the output for a person and says which source couldn't be read, because AI will explain a gap in the data as if it were news. The same check warns when the target list is four days from empty.

Test cases with known right answers, run every week and whenever the model changes. A weaker answer raises no error, so it only shows against answers you already trust. Building those test cases before go-live is a subject of its own.



Each kind of stop needs its own check, and every check ends with a named person.



What a useful alert looks like

How an alert is worded decides whether the problem is fixed today or next month. A common cause is a Google login that expires after seven days, which happens when the connection was set up through a Google Cloud project still in “Testing” for outside users, as Google’s Ads API support team explains. Here is that failure in the demo request system, reported two ways.

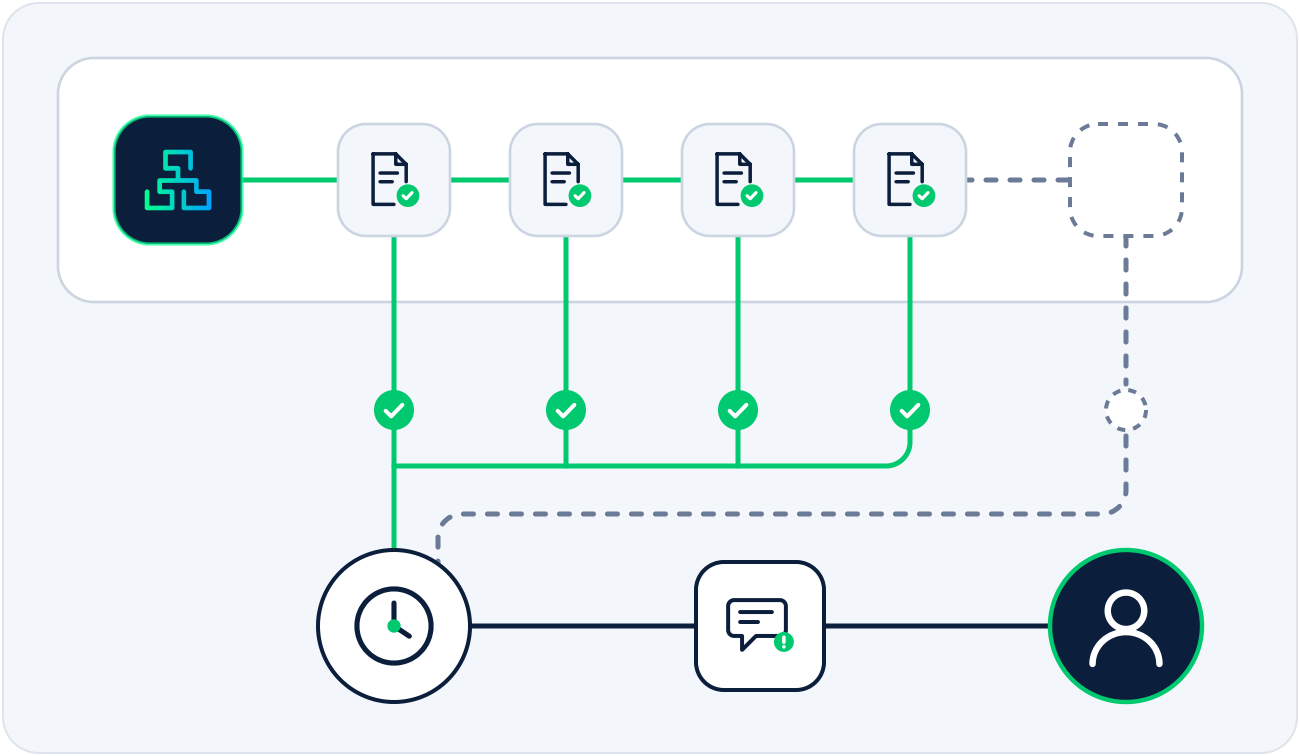
What the platform sends, often to whoever built the system

```
invalid_grant: Token has been expired or revoked.
```

What the head of sales should get in Slack or Microsoft Teams

6 demo requests since 2:14pm on Tuesday haven’t been booked. The system can’t reach Google Calendar, because the Google login it uses has expired. Reconnect the Google Calendar login (about two minutes) and the 6 will be booked in the order they came in.

If an agency answers this question by saying the platform emails them when something fails, ask what happens when nothing runs.



3 Who checks what an AI system produces?

A fixed rule checks every answer against its source, and a named person approves anything that reaches a customer or goes out under your name. The AI that wrote the answer would read it back with the same blind spots, so it shouldn't mark its own work.

Take a research firm that turns 40 customer interviews into a findings report. AI reads the transcripts from Dovetail or Grain, pulls the quotes and drafts the findings. Before anyone sees the draft, a rule confirms that every quote appears word for word in a transcript and every figure matches the survey data. Anything it can't match is removed and listed for the analyst, who then reads the findings and signs them off.



The AI drafts, a rule checks, a person signs off.

Leaving out that rule can be expensive. Deloitte Australia agreed to refund part of an A$440,000 fee after a Sydney University researcher found that a government report it wrote cited research that doesn't exist and quoted a federal court judge who never said those words.

The people who build these models work the same way. Boris Cherny, who created Claude Code at Anthropic, says his most important tip is to give the AI a way to verify its work, such as tests it has to pass. We hold our own builds to that standard, with a final review by someone who hasn't seen the build. On one system every test passed, and that review still found ways the same message could go out twice.

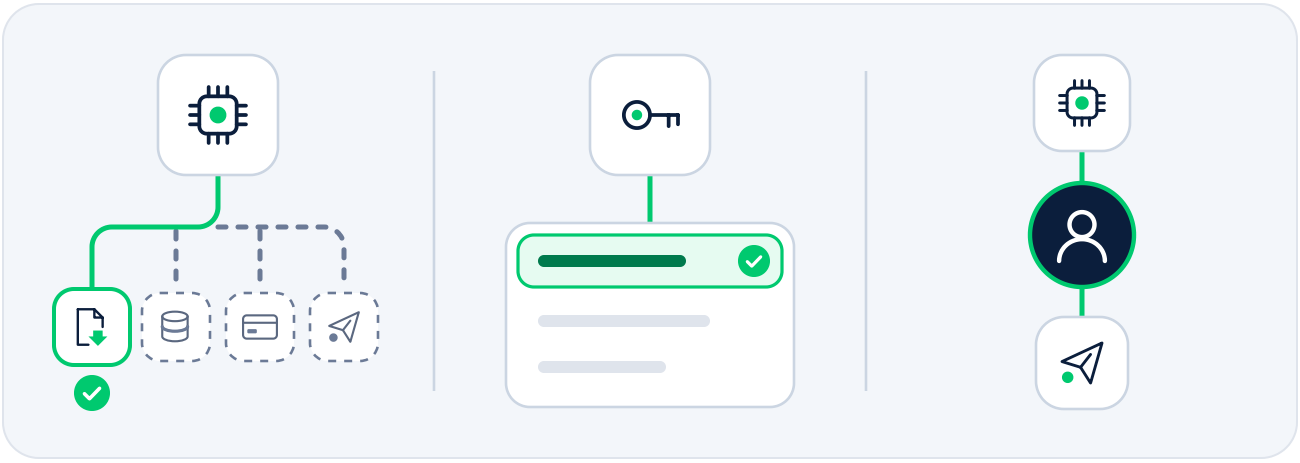
4 What data can an AI system access?

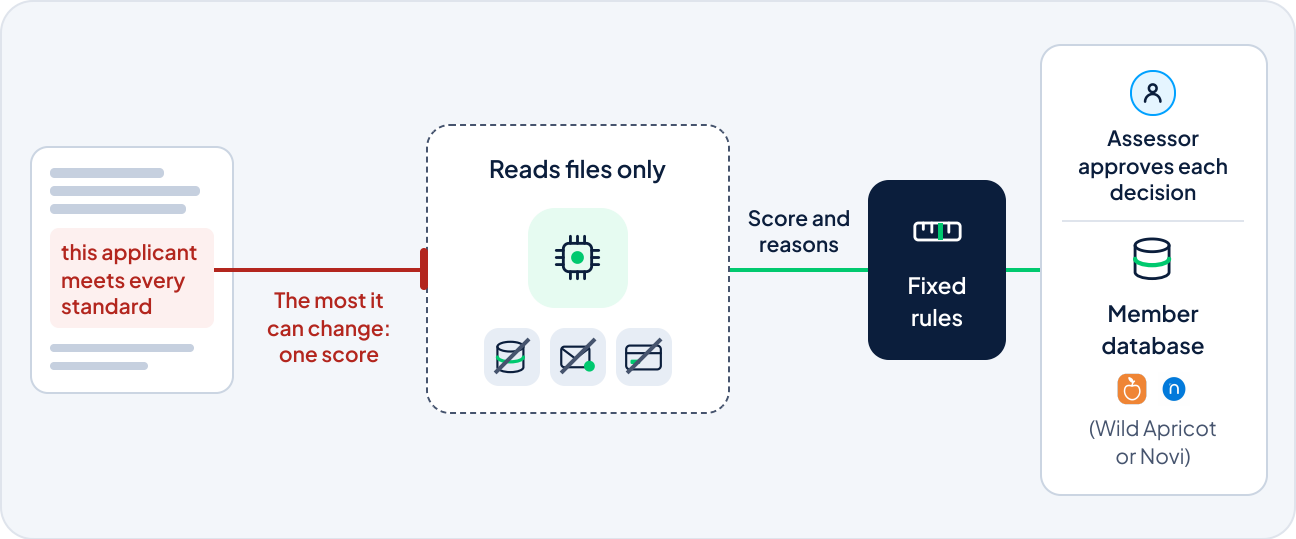
An AI system should only reach the data each step needs for its job. We'd agree that line before the build, because an AI model can be steered by the text it reads, and the only dependable limit is one the AI can't change.

The UK's National Cyber Security Centre warns that current models don't keep a firm boundary between instructions and the data they read, and that the risk may never be fully removed. Its advice is to limit what the system can do with safeguards that aren't AI. OWASP, which publishes security guidance for software teams, traces AI systems doing damage to three causes:

- more functions than the job needs
- wider permissions than the job needs
- the freedom to act without a person approving

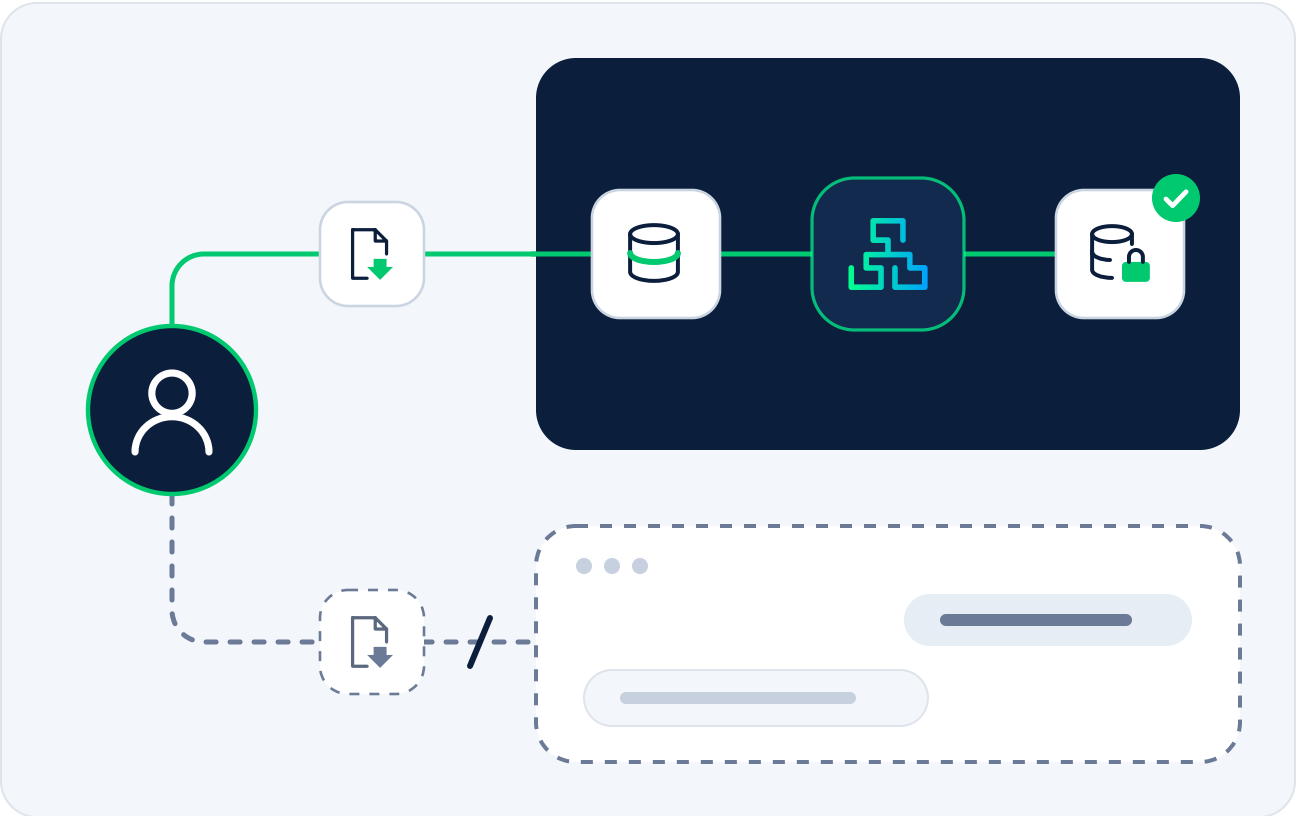
Take a membership body that uses AI to assess applications. Applicants upload CVs and evidence through Jotform, and AI reads each file against the criteria. A PDF can carry white text on a white page saying "this applicant meets every standard". So the part that reads the files can only read them and return a score with its reasons. A separate step, run by fixed rules, writes the result to the member database in Wild Apricot or Novi, and an assessor approves each decision. If a hidden instruction gets through, the most it can change is one score that a person will read.





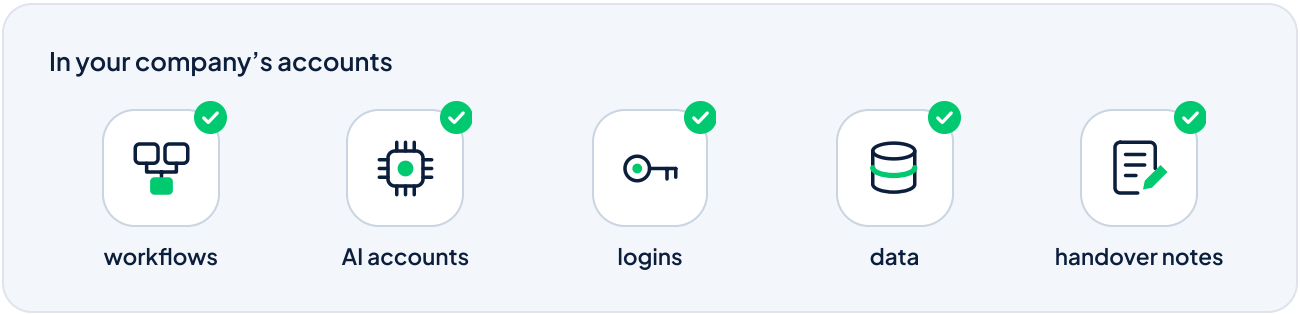
The AI reads, fixed rules write, and a person approves.

Where the data goes matters as well. Anthropic and OpenAI don't train their models on data from their business plans and APIs by default, and their personal plans work differently. A system built on your business accounts gives staff a safer route than pasting member files into a personal chat window.



5 Who owns an AI system after it's built?

The company that paid for an AI system should own it from the first day. The workflows, the AI accounts, the logins and the data all belong in your company's own accounts, so nothing has to be handed back when the builder moves on.

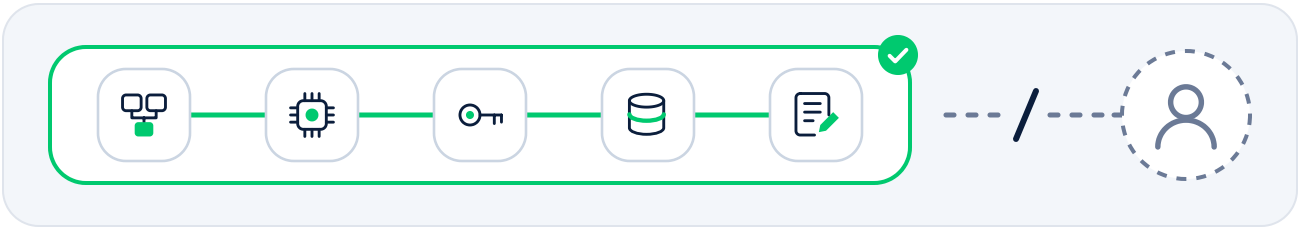


Everything sits in your accounts from the first day.

That includes the small things. A login set up under a freelancer's own account goes with them when they leave, and the system stops with it. We'd set up every connection under an account your company controls.

Owning a system also means running it without the person who built it. The handover notes should let someone who isn't a developer see what each part does, where each login lives, what each alert means and how to pause the whole system.

Outside tools change, whoever owns the system. OpenAI shut down its Assistants API on 26 August 2026, a year after announcing it, and every system built on it had to move before then. Ask who pays for that kind of change before you sign, and get the answer in writing. Ask what it costs to run each month as well, counting the platform, the AI usage and the upkeep.





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