

Start with one workflow

From using AI to running on it: find where it helps, test it in 30 days, make it stick.



8 STEPS

| 7 WORKSHEETS

| A 30-DAY PLAN

Every business will use AI. Very few will run on it.

We've spoken with 50+ companies about AI. Most had already tried it: a subscription, an app, a training day. Weeks later, the work still ran the old way. The same reasons keep coming up:

Tool first. The right first question is where you're losing time, money or clients.

Everything at once. Ten ideas, no owner, nothing finished.

Scattered data. Briefs in chats, tasks in sheets, process in someone's head.

AI outside the work. People copy from a chat window into WhatsApp, then give up.

The fix: one workflow, done properly, in three phases.

Your role as the founder. Pick the workflow, name its owner, and make the call on review day. Your team does the rest. And "build" doesn't mean code: your first pilot runs on WhatsApp, a spreadsheet and an AI assistant like ChatGPT, Gemini or Claude.

THE 8 STEPS

IDENTIFY

- 1 Find the leak** Pick your costliest workflow
- 2 Map the work** See how it really runs
- 3 Sort every step** Fix, automate, AI or human
- 4 Check what AI can't fix** Data layer, owner, team, risk

BUILD

- 5 Design the new workflow** System, AI and person lanes
- 6 Run a small pilot** Two weeks of real work

HANDOVER

- 7 Make it stick** Train, check in, fix weekly
- 8 Scale, fix or stop** Decide with numbers

Find the leak

Pick the workflow that costs you the most, not the most exciting.

A workflow is work that repeats in the same steps, like:

brief → script → client approval → publish.

Leaks hide where work waits on one person.

WORKSHEET · SCORE YOUR CANDIDATES (1 = LOW, 5 = HIGH)

WORKFLOW	OFTEN	HURTS	PREDICTABLE	MEASURABLE	TOTAL

Put a number on it.

Weekly hours × 52 × what an hour costs you = what this leak costs a year: _____

EXAMPLE AGENCY (ILLUSTRATIVE)

One agency runs through every step: 12 people and 18 retainer clients, with every post coordinated on WhatsApp and sheets.

The founder said: **"I keep asking what everyone's working on, and I can't tell which retainers actually make money."**

Calendar → approval → publish scores **19 out of 20 here.**

Three managers each spend about 1.5 hours a day chasing updates: that's **27 hours a week.**

Elyst AI rule #1. Choose the boring workflow that touches money over the one that makes a good demo.

Map how the work really happens

You know how it should work. Your team knows how it actually works.

Walk through the last three real examples with the person who does the work. For every step, note who, where (app, sheet, chat or paper) and how long. Tag the trouble: **WAIT, RETYPE, ERROR** or **JUDGMENT** (a person must decide). Your "where" column is the first sketch of your data layer.

WORKSHEET · TODAY'S MAP

#	STEP	WHO	WHERE	TIME	TROUBLE	SORT
1						
2						
3						
4						
5						

EXAMPLE MAP (ILLUSTRATIVE)

STEP	WHERE	TIME	TROUBLE
Plan the calendar	Google Sheet	30 min	WAIT: owner unclear
Write the script	WhatsApp, Docs	45 min	RETYPE
Client approval	WhatsApp	–	WAIT: days
Shoot	Calls, WhatsApp	2 hrs	WAIT
Edit and design	Drive, WhatsApp	90 min	WAIT: no handoff owner
Publish	Scheduler	10 min	ERROR: old version
Report	Sheets, by hand	20 min	RETYPE

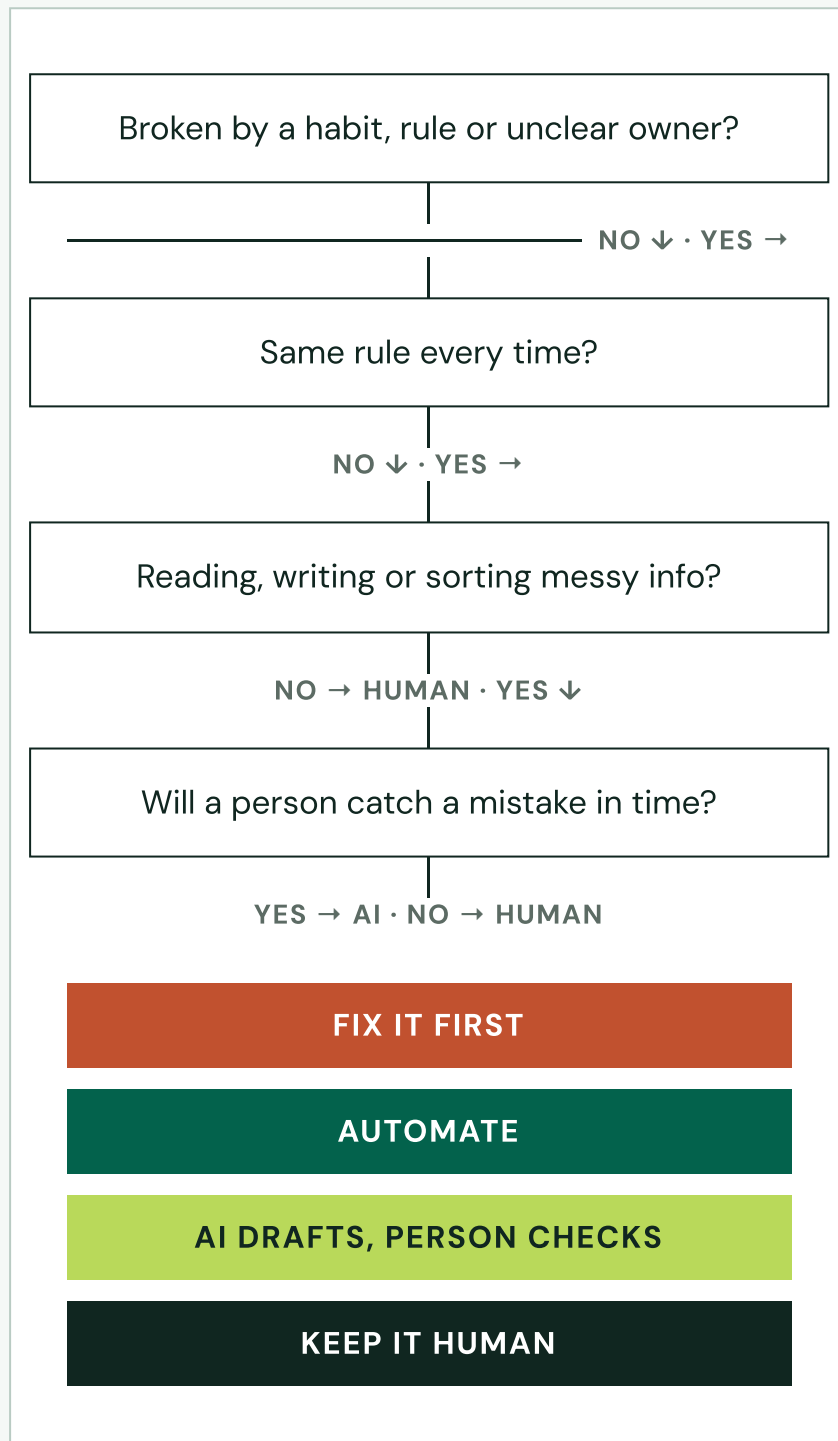
About 5 hours of work per post, spread over 8 days, and nobody logs the hours per client. The waiting costs more than the work, and waiting isn't a technology problem.

Elyst AI rule #2. Map the busy works that consumes the day, not what looks fancy.

Sort every step: Fix, Automate, AI or Human

Most steps don't need AI. They need something simpler.

Run each step on your map through these four questions, and write the answer in the Sort column.



EXAMPLE AGENCY (ILLUSTRATIVE)

STEP	SORT	WHAT CHANGES
Plan the calendar	FIX	One owner per client calendar, in one shared tracker
Write the script	AI	AI drafts from the brief and brand notes; the writer edits
Client approval	AUTO	The tracker flags anything waiting over 48 hours
Shoot	FIX	Shoots booked in the tracker, not over calls
Edit and design	FIX	No handoff without a named owner and a brief
Publish	HUMAN	A person checks the final version and publishes
Report	AUTO AI	Hours and status come from the tracker; AI drafts the summary

Only two of the seven steps need AI.

Elyst AI rule #3. Sometimes the best AI project has no AI in it.

Check what AI can't fix

AI can draft, sort and summarise.
It can't organise your data, own the work, or win over your team.

Start with your data layer.

It's the one place a workflow's information lives: the records it creates (every task, brief and approval) and the knowledge it runs on (brand notes, templates, past work).

AI is only as good as the data it can reach.

WORKSHEET · FIVE CHECKS

Green is fine for a pilot. Red is not.

CHECK	GREEN	RED	YOURS
Data layer	Records and knowledge in one place, current	Scattered across chats, files and heads	☐
Owner	One named person, ideally not you	"Everyone", so no one	☐
No second system	Works inside tools your team already uses	Copying between screens all day	☐
Checker	Checking AI's work is faster than doing it	Nobody has time to check	☐
Cheap mistakes	A person sees AI's work before a client does	A wrong post can reach a client	☐

Before pasting client details into any AI tool, check its data settings and share only what the task needs.

EXAMPLE AGENCY (ILLUSTRATIVE)

Their data layer: one task tracker (owner, status and hours for every task), a brief template and brand notes per client. Two checks started red: the brand notes had to be written first, and after two dropped project tools, the tracker had to live in the team's existing sheet.

Elyst AI rule #4. If nobody can say who checks the AI's work, you're not ready to switch it on.

Design the new workflow

Put every step in one lane. All three work from the same data layer, so nothing gets retyped.
Unusual cases always go to a person, and if AI fails, the old way still works.

EXAMPLE (ILLUSTRATIVE)

SYSTEM	Logs every task in the tracker and flags approvals waiting over 48 hours
AI	Drafts scripts, handoff briefs and the weekly summary
PERSON	Owens every handoff, does the creative work, talks to clients, publishes
DATA	Task tracker · Brief template · Brand notes

WORKSHEET · YOUR LANES

SYSTEM	
AI	
PERSON	
DATA	

Brief your AI like a new hire. Save it as a custom GPT, Claude Project, Gemini Gem or a note.

Role: You're the content assistant for [agency], making [what] for [client].
Task: Draft a script from the brief below. Never send anything.
Use only: this client's brand notes and brief.
Never: invent offers, prices, dates or approvals.
Tone: the client's brand voice, in their language.
If unsure: start with "CHECK:" and ask [name].

Elyst AI rule #5. The new workflow lives where your team already works. One more app to open, and they will quietly stop.

Run a small pilot

Two weeks. Real work. Two or three people. Numbers before and after.

- 1 Measure the "before". One normal week, the old way.
Without it, you will only know how AI felt.
- 2 Pick two or three users, including one sceptic. They find the real problems fastest.
- 3 Set targets the workflow controls: speed, rework, missed deadlines, hours. Not revenue.
- 4 Write the stop rule now, while you're still objective.

Let the data layer do the counting. If every task has a timestamped row, waiting time and hours per client count themselves. Run the "automatic" parts by hand at first, and automate once it works.

WORKSHEET · PILOT SCORECARD

MEASURE	BEFORE	TARGET	WEEK 1	WEEK 2
AI drafts used with light edits				
Work done the new way				

Stop rule: If _____ by _____, we stop and rethink.

Elyst AI rule #6. Count the checking time. If fixing an AI draft takes longer than writing it, AI made that step slower.

Make it stick

A tool your team doesn't use is just a monthly bill.

Pilots rarely get cancelled. They fade, because the old way is familiar and nobody asks what's in the way.

WORKSHEET · HANDOVER CHECKLIST

- ☐ Trained on our own real work, not generic demos
- ☐ Everyone has the kit: AI brief, brand notes, three great examples
- ☐ Go-to person on the team, not you: _____
- ☐ 15-minute check-in every week, fixing one thing: _____
- ☐ Old way closed, so there's only one way to do it: _____
- ☐ Team told why: AI takes the repetitive work, they keep the judgment

EXAMPLE AGENCY (ILLUSTRATIVE)

Week 1: AI scripts sounded generic, so they added three of each client's best posts as examples.

Week 2: a campaign launch got a routine brief, so campaigns now go straight to the account lead.

Elyst AI rule #7. A workshop is a start, not a solution. People learn AI on their own work.

Scale it, fix it, or stop it

Put the numbers next to the "before" and make one call.

WORKSHEET · THE DECISION

	SCALE	FIX	STOP
When	Targets met, people use it, mistakes are rare	Some targets met, and you can name what's wrong	Poor quality, no usage, or checking costs more than it saves
Then	Roll it out, connect the tools properly, pick the next workflow	Change one or two things and run two more weeks	Stop, and write down what you learned
Your call	☐	☐	☐

EXAMPLE AGENCY AFTER TWO WEEKS (ILLUSTRATIVE)

Their call: scale the tracker and AI scripts for routine posts, and hand campaigns back to a person. That's why script time missed its target.

Elyst AI rule #8. Stopping a pilot isn't failure. Scaling one nobody uses is.

BEFORE / TARGET / AFTER

MEASURE	BEFORE	TARGET	AFTER
Status chasing, hours/week	27	Under 5	4
Tasks with owner and hours	None	All	9 in 10
Script time / post	45 min	Under 20 min	30 min
AI drafts, light edits	–	7 in 10	8/10 posts, 2/10 campaigns

Then go again. Every workflow you fix adds to your data layer, so the next one starts faster. That's how a business ends up running on AI.

Your next 30 days

Print it. Fill it in. Put it where you'll see it.

My workflow

What it costs today (hours a week)

Owner

Pilot starts

Review day

Every week this waits, it costs you the hours you wrote above.

THE 30-DAY PLAN, RECAPPED

Week 1. Score and pick your workflow. Map it with the person who does it. Measure a normal week.

Week 2. Sort every step and make the no-tech fixes. Set up your data layer. Draw the lanes and write the AI brief.

Weeks 3 and 4. Pilot with two or three people. Check in weekly and fix one thing.

Day 30. Scale, fix or stop. Then pick the next workflow.

On the call, we don't pitch, quote or demo anything. We ask how your work runs today. If something's worth doing, we come back within five business days with a map: what we found, ranked by what it costs you, and what we'd do first. If not, we'll say so.

Want a second pair of eyes?

You can do all of this yourself. If you'd rather not, this is our work. We help businesses run on AI, not just use it:

Identify. We find where AI really helps, and where it doesn't.

Build. We design the workflow around how your team already works.

Handover. We train your team, then step back. You own it, not us.

Book a 30-minute call