

START HERE

Your first AI workflow

A practical 30-day preparation plan

Choose one recurring task. Understand the workload. Decide what AI may prepare and what a person must approve. Finish with a brief you can use to make a sensible pilot decision.

What you will leave with

One defined workflow, a baseline of today's effort, review rules, a cost worksheet and a short implementation brief. The aim is a better decision, not automation for its own sake.

How to use this guide

Work through the plan with the person who actually does the task. Use the writing spaces to record your own evidence. A small team can combine sessions; if examples are scarce, extend the measurement period.

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These 30 days are preparation you can do with your team. They are separate from Marvix's paid 45-day pilot. Reading this guide does not order a service or commit you to a purchase.

CHOOSE

One job with a clear finish.

Start with a repeated task where the inputs, expected output and reviewer are easy to name. Keep the first scope small enough to inspect.

Name the trigger and the result

For example: an enquiry enters one shared inbox; a reviewer receives a draft reply and a list of missing information. 'Automate the office' is too broad.

Check five practical conditions

The task recurs often enough to measure. Representative examples are available. The result can be checked. Someone owns the process. A mistake can be stopped or corrected before it reaches a customer.

Reduce scope before adding tools

Choose one inbox, one request type and one review route. If every case requires a different expert decision, start by improving the checklist or information collection.

Pause if these are missing

No reviewer, unclear permission to use the data, no trustworthy source, or a task that is rarely repeated. A simpler template or manual process may be the better first move.

Our recurring task and trigger

What should be ready at the end?

Who owns the process and reviews the result?

Choose the problem before choosing the software. AI is one possible tool, not the acceptance criterion.

RECOGNIZE

Different businesses. Similar friction.

These are illustrative workflow designs, not customer case studies or promises of delivered results.

Accounting: missing documents

Starting problem: staff repeatedly compare received files with a checklist and chase gaps. AI may prepare a missing-item list and reminder draft from approved sources. The accountant checks the list and approves the message. Tax conclusions, postings and unusual documents remain with a qualified person.

Logistics: incomplete enquiries

Starting problem: a dispatcher extracts dates, locations and load details from emails. AI may organize supplied facts, flag omissions and prepare follow-up questions. The dispatcher confirms capacity, price and delivery commitments. Missing data must remain marked as missing.

Other service businesses: enquiry preparation

Starting problem: the owner repeatedly asks the same questions before preparing a proposal. AI may classify the enquiry and draft a response using agreed rules. The team confirms fit, scope, terms and pricing before sending anything.

What all three need

An agreed source of truth, a bounded task, a named reviewer and an exception route. Integration with your actual inbox or business software must be checked before implementation.

Which example resembles our work?

What must remain a human decision in our version?

CONTROL

Preparation by AI. Decisions by people.

Write the boundaries before connecting live tools. A draft is not an approval, and silence is not permission to send.

Allowed preparation

Define the exact reading, sorting, extraction and drafting actions. Specify the approved sources. Keep access limited to the tools and records needed for that task.

Human approval

Name who approves outbound messages, prices, commitments and changes to business records. Decide who covers absence and how long a draft may wait.

Exceptions and recovery

Missing facts, conflicting sources, unfamiliar requests or failed integrations should route to a person. Define who can pause the workflow, where activity is recorded and how the manual process resumes.

Examples and sensitive information

Use synthetic or redacted examples for the first discussion. Keep client files in approved systems. Before live processing, agree access, providers, retention and applicable contractual responsibilities for the actual workflow.

AI may prepare

A person must approve

Stop and escalate when / responsible person

Never invent a price, deadline or missing fact to complete a draft. A visibly incomplete result is safer to review than a confident guess.

PLAN

Your next 30 days.

This is a preparation schedule, not an implementation deadline. Move forward when the evidence is ready; extend a stage when it is not.

Days 1–7 | Define

Choose one recurring task with its owner. Map the trigger, sources, output, reviewer and exception route. Collect a small set of redacted normal and difficult examples. Deliverable: a one-page process description.

Days 8–14 | Measure

Log normal work without changing the process. Count eligible items and active handling time, including corrections. Record waiting time separately. Deliverable: a baseline with dates and a clear sample description.

Days 15–21 | Set the rules

Agree what AI may prepare, what needs approval and which errors are unacceptable. Check available access and software connections. Choose quality and cost limits. Deliverable: review rules and written acceptance criteria.

Days 22–30 | Decide

Complete the cost worksheet and brief. Compare a simpler manual improvement with a scoped AI pilot. Bring unresolved questions to a fit call. Deliverable: a decision to prepare further, explore a pilot or stop.

Process owner / planned review date

What could delay preparation?

Ready sooner? You can have the introductory conversation earlier. Need longer? Do not rush evidence gathering to meet the calendar.

WORKSHEET 01

Measure the work you actually do.

Keep this worksheet with your team. Record cases in your approved system without copying personal or confidential details into a shared public document.

Use a representative sample

Record the dates, eligible item count and any unusual conditions. Include easy cases and exceptions. A quiet week or seasonal peak may not represent a normal month.

Measure active time separately

Count reading, checking, writing and corrections. Track elapsed waiting time in a separate column. A request waiting overnight is not eight hours of staff effort.

Date / case code	Active minutes	Correction minutes*	Exception / wait

*Included in active minutes, not added again. Use anonymous case codes. Waiting time is separate.

Period / eligible items / total active minutes

Average active minutes per item / common exceptions

Baseline hours = total active minutes / 60. Record the sample size alongside every result. If the volume is uncertain, measure first.

WORKSHEET 02

Compare effort. Account for every cost.

Agree targets before a pilot. Complete the after-pilot column only with measured results from a comparable workload.

Measure	Baseline	Pilot target	Observed
Eligible items / period			
Human minutes per item			
Extra oversight minutes			
Items needing correction			
Critical errors / exceptions			
AI and hosting cost			
Other software cost			

Count the remaining work

After-pilot effort includes reviewing, correcting, handling exceptions and maintaining the process. Compare the same period and case mix, or state the differences. Freed capacity is not automatically a payroll saving.

Illustration only: the arithmetic

60 items x 8 minutes = 480 minutes today. Afterward, 60 x 3 human minutes plus 30 extra oversight minutes = 210 minutes. The difference is 270 minutes, or 4.5 hours. These are invented numbers to show the method, not a Marvix result.

Separate one-time and ongoing costs

The scoped Marvix pilot is EUR 690 once, excluding VAT. AI usage and hosting are extra. Include internal preparation and review time. The monthly running of the AI employee and changes are described on our pricing page: marvixdigital.com/en/pricing. Do not treat the pilot fee as a recurring quote.

Our acceptable quality level / cost ceiling / decision date

Continue only if quality, adoption, remaining human effort and total cost support the decision. Activity counts alone do not prove value.

LOOK AHEAD

Grow from a working foundation.

The five stages show where a relationship can expand. They are not a package of included features, a revenue ladder or a promise of autonomous operation.

01 | Administration: start here

Inbox triage, reply drafts, calendar support and useful summaries. Begin with one agreed administrative workflow.

02 | Delivery and operations

Explore document collection, task handoffs and customer updates once the first workflow has a dependable owner and review process.

03 | Marketing

Consider content preparation and campaign coordination. People review accuracy, brand voice and publication.

04 | Sales

Consider enquiry preparation, proposal drafts and follow-up support. Your team owns fit, pricing and commercial commitments.

05 | Leadership support

Consider knowledge retrieval, reporting and decision preparation. Leadership remains responsible for strategy, people and decisions.

Choose the next stage around a real bottleneck and measured results. Each expansion needs its own scope, integrations, readiness check and price. You may never need all five.

YOUR NEXT STEP

Bring one clear brief.

You do not need a technical specification. These five answers are enough for a useful first conversation.

The recurring task, trigger and expected result

Current volume and active effort, with measurement dates

Approved tools, information sources and access questions

Named reviewer, approval boundaries and manual fallback

Success criteria, cost ceiling and open questions

Choose your next step

If the process is unclear, define it first. If the workload is uncertain, measure it. If the task repeats and a reviewer is ready, explore whether a bounded pilot makes sense.

What happens in a fit call?

A free 30-minute conversation with Marko about one workflow, your tools and whether a pilot is appropriate. Bring the brief, not confidential client files. Scope, access, acceptance criteria and terms are agreed before paid work begins.

Find your starting point

Book a free fit call

marvixdigital.com/en/pricing

Prepared by Marko Bizjak, Marvix Digital. Planning guide, September 2026. No outcome or savings guarantee. Use the current pricing page and written proposal for commercial terms.