AT | INNOVATORS

AI for owner-led service businesses

THE LEAK REPORT

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4 workflows that quietly leak money

In almost every 5–50 person service business

Follow-up arrives on five channels and the set has no owner

Approvals should be sped up, not removed

Visibility is cheaper than automation and changes behaviour first

Scoping that concludes you should build nothing is a result

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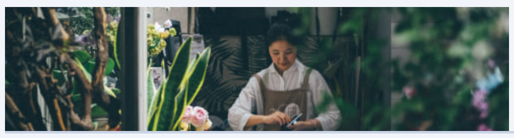
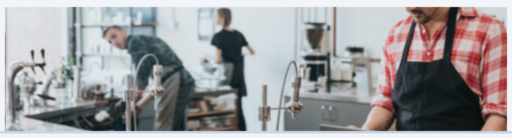
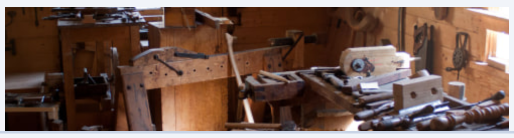
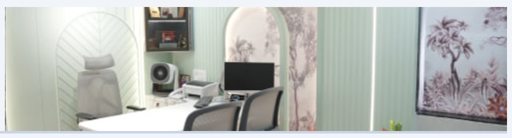

The Leak Report is published by AT Innovators, an AI development studio building voice agents, retrieval assistants and workflow automation for owner-led service businesses.

Words and research **Ramanjit Singh**. Every figure in this issue is either published on our pricing page or stated as a target rather than a result.

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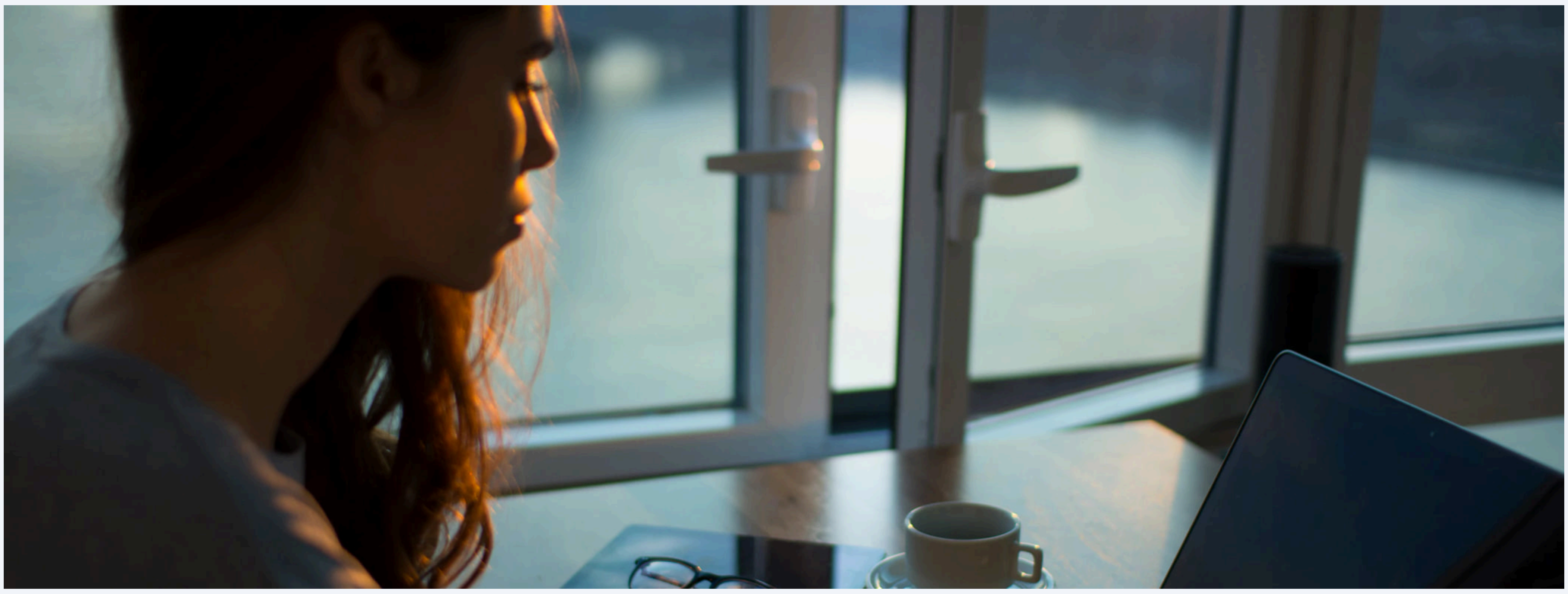
Most of this advice was written for somebody else.



The person evaluating AI is usually also the person quoting the job.

Most AI advice aimed at small businesses is written for companies that do not look like yours. It assumes a data team, a backlog of clean records, and someone whose job is to own the rollout.

In a 5–50 person service business, the person evaluating AI is usually also the person quoting jobs, chasing payment, and covering for whoever is on leave. That is not a smaller version of an enterprise problem. It is a different problem.

What follows is the scoping conversation we have before quoting any project. It is about deciding **what** to automate — because that decision costs nothing to get right and a great deal to get wrong.

It is deliberately unexciting. The most valuable thing in these pages is a test that sends some projects back, and the reason our audit is free is that it is the step most likely to conclude you should not build anything yet.

Ramanjit Singh Founder, AT Innovators

THE FEATURE

The one distinction that matters

Almost every failed AI project we have seen confused two very different kinds of work. The distinction is easy to state, and easy to abandon the moment a demo makes the second kind look solved.

Automate what is repetitive.
Keep what is consequential behind a person.

Tell them apart before you spend anything.

Work that is repetitive

Reading, sorting, summarising, looking things up, retyping the same information into a second system. Nobody's judgement is being exercised.

If a machine does it badly, you notice immediately and nothing is lost.

Automate this freely.

Work that is consequential

Sending a reply to a customer, issuing a quote, approving a discount, telling someone their application was rejected. Judgement is the entire point.

If a machine does it badly, you find out from the customer.

Put this behind a person, always.

That sounds obvious written down. It stops being obvious when a demo shows an agent replying to customers on its own and the time saving looks enormous. The time saving is real. So is the day you spend apologising for what it said.

The four workflows that actually leak

01

Follow-up falls through the cracks

Enquiries arrive on WhatsApp, email, web form, phone and sometimes Instagram. Each channel has an owner. The set has no owner.

02

The owner cannot see what is happening

A status update takes an hour. That hour is spent assembling the number rather than acting on it — and it was true this morning.

03

Approvals stall the work

The quote was finished at 11am and went out at 4pm. The customer had already decided you were not interested.

04

The same admin, every day

Nobody was hired to retype an address from an email into a CRM, or to hunt for the version of the policy that is current.

> **The pattern.** Three of these four are missing-handoff problems, not missing-software problems. That is why buying a tool so often changes nothing: the tool arrives, the handoff is still undefined, and the work still stops in the same place.

Five channels, five owners, and no owner for the set.

FOLLOW-UP

Nobody can say how many open enquiries exist right now, so the honest answer to “did we get back to them?” is “probably”.

This is the highest-value thing to fix first, because the cost is invisible. You do not see the enquiry you never answered, and a missed enquiry never complains.

The fix is rarely a new inbox. It is one queue that every channel lands in, tagged with its source, with a named owner for the set rather than for each channel.

VISIBILITY

You ask for a status update. Someone opens three tools and a spreadsheet and comes back an hour later with a figure.

Decisions get delayed not because the data does not exist but because assembling it costs an hour every time.

A dashboard showing current state is cheap and changes behaviour immediately. Owners stop looking after three weeks, though, unless it is where a decision gets made.

A number that was true this morning, assembled by hand.

APPROVALS

The work is finished. It is waiting on one signature.

A quote, a reply, a document, a discount — all waiting on one person who is in a meeting. The work is done. It is just sitting there.

This is where AI is most useful and most dangerous, because the temptation is to remove the approval rather than speed it up.

Widen who can approve, put the draft in front of them where they already are, and keep the send button human. Often one person is the bottleneck only because nobody ever defined a second approver.

Nobody was hired to do this, and it fills the day anyway.

ADMIN

Copying details from an email into a CRM. Summarising a call. Chasing the same three people for the same three things.

None of it requires judgement, all of it requires a person, and it expands to fill whatever time is available.

This is the safest category to automate and the easiest to measure, which makes it a good second project even though it is rarely the most expensive leak.

What a first project has to pass.

Mapping the workflow is the step most likely to end the project honestly.

A first project should be small enough that failing is cheap and specific enough that success is measurable. Look for a workflow with all four of these.

1. **A real, named user**

   Not "the team". A person who does this on a Tuesday, and who will notice when it stops.

2. **A repeated trigger**

   At least weekly, ideally daily. Monthly work never accumulates enough evidence to improve.

3. **An observable outcome**

   Response time, open items, hours spent — something measurable this month without buying new tooling.

4. **A tolerable failure mode**

   If the system is wrong, someone notices before a customer does.

If a candidate fails the last test, it is not a bad workflow — it just needs a person in the path. That is a design decision, not a disqualification.

Four claims that do not survive contact.

“It learns your business.”

Retrieval over your documents is real and useful. A model that quietly absorbs how your company works and improves on its own is not what you are buying.

Fully autonomous, customer-facing.

The technology can do it. The question is whether you want to hear about mistakes from a customer. Draft prepared, human sends, captures most of the saving with none of the exposure.

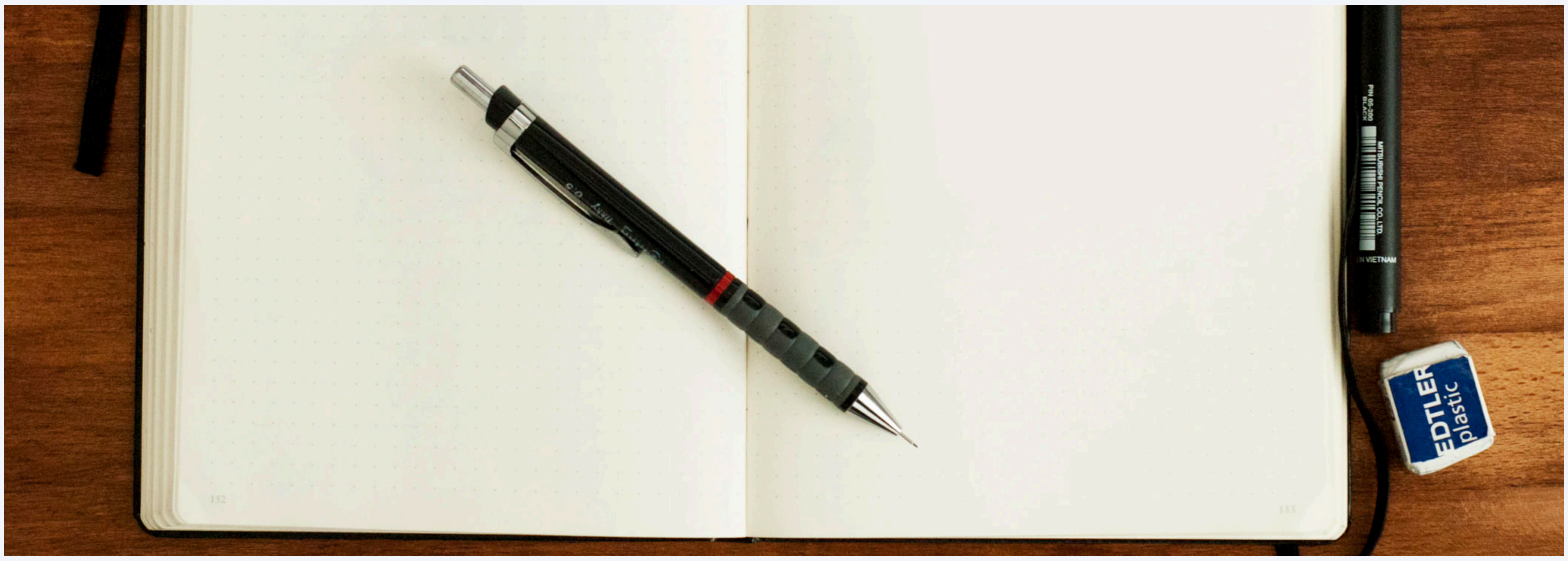
Anything that cannot show its source.

If an assistant answers a question about your policies, you need the document and the page. Without that, a wrong answer is indistinguishable from a right one.

Replacing a person as the goal.

In a team of twelve nobody is doing one job. Removing a task rarely removes a headcount; it gives that person their afternoons back. Price the task, not a salary.

AI comes fourth, not first.



Steps one to three are what make step four safe.

1 **Map one workflow**

Where it starts, who touches it, where it stalls, what “done” means. This usually reveals a missing handoff rather than a missing tool — and sometimes ends the project honestly, right there.

2 **Fix the visibility first**

A dashboard showing current state is cheap, changes behaviour immediately, and tells you where automation would actually pay.

3 **Automate the repetitive middle**

Classifying, summarising, drafting, routing. Keep the send button human.

4 **Only then consider the edges**

Voice intake, customer-facing chat, anything autonomous. By now you have real numbers on volume and failure rates instead of guesses.

Most engagements we run stop after step two or three, and that is a legitimate outcome. A dashboard and three automations that people actually use beats an ambitious system nobody trusts.

WHAT IT COSTS

Published, because “contact us for a quote” wastes your time.

AUDIT	**Free**	One workflow, mapped. Often concludes you should not build yet.
PROTOTYPE	**from $800**	A working slice you can put in front of one real user.
PILOT	**$2,500–$7,000**	A system a real team uses in production, with a run log.

Send one workflow that keeps leaking.

The useful first message is one sentence: what gets missed, repeated, delayed, or is hard for you to see.

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