

**YOUR STARTING POINT**

# Bring the problem. Shape the project.

A practical workbook for business owners, operations teams, and technology partners preparing a website, connected workflow, custom application, or AI implementation.



Use this workbook to describe the work, surface important decisions, and prepare for a useful conversation. You do not need to know the right software or have every answer. Complete the pages that fit your project and leave the rest blank.

**Business / project name**

**Prepared by / process owner / date**

Inside: the business problem, current workflow, systems and information, AI review decisions, pilot scope, restaurant and service-center examples, acceptance evidence, costs, launch, and handoff.

Fill the fields in a PDF reader that supports forms, or print the workbook and write in it. Save your own copy before sharing it. Use anonymized examples; keep passwords and private customer records out of this preparation document.

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**01 / BUSINESS PROBLEM**

# Define a useful outcome.

Focus on one repeated task or customer experience. A concrete starting point is easier to scope and test than a broad request to automate the whole business.

**What task or customer experience needs to improve?**

**What starts the work, and what useful result ends it?**

**Where do staff lose time or customers get stuck?**

**Who does the work, approves decisions, and owns the outcome?**

**How often does this happen? What is the current volume or effort?**

**What would a useful first improvement look like?**

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**02 / CURRENT WORKFLOW**

# Walk through the work today.

Use a real example with sensitive details removed. Include handoffs, repeated data entry, waiting, and the decisions people make.

For each step: note the input, person or team, system used, output, and what can go wrong.

**Step 1: input / owner / system / output / exception****Step 2: input / owner / system / output / exception****Step 3: input / owner / system / output / exception****Step 4: input / owner / system / output / exception****Step 5: input / owner / system / output / exception****The biggest bottleneck or repeated manual handoff**

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**03 / SYSTEMS AND DATA**

# Map the systems and information.

List the tools the workflow touches and where staff go for an authoritative answer. A software name and a walkthrough are enough to start discovery.

**Customer-facing channels: website, phone, email, chat, forms, or messaging**

**Business records: CRM, POS, ERP, scheduling, accounting, or other tools**

**Approved information: menu, policies, product data, documents, or procedures**

**Source of truth and owner: who maintains each important record?**

**Connections and access: supported APIs, imports, exports, or vendor contacts**

Questions for discovery: Is the information current? Do users have different access? Are licenses or vendor approvals required? What happens when records disagree? Who can authorize access?

**Data quality, privacy, or access requirements to discuss**

**04 / AI AND STAFF DECISIONS**

# Decide where AI helps.

Use predictable rules for repeatable steps. Use AI where interpreting language or variable information is useful. Define what it can read, suggest, and do.

**Information the assistant may use, with source owners****Questions or tasks it may handle without staff intervention****Actions it may prepare as a draft, but must not release without approval****Requests that must stop, ask for clarification, or go to a person****Who receives a handoff, and what context must arrive with it?**

Example boundaries: staff review refunds, prices, contractual commitments, access changes, and requests outside the approved workflow. Unknown or conflicting information should be visible rather than guessed.

**How you will test accuracy, permissions, failures, and staff takeover**

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**05 / SCOPE AND PILOT**

# Choose a manageable pilot.

A pilot explores a limited question. A production implementation also needs reliable connections, permissions, exception handling, operating guidance, and acceptance checks.

**One task, location, team, channel, or transaction type to start with**

**Included in the pilot**

**Outside the pilot: what should remain with the existing process?**

**People, content, access, or vendors the pilot depends on**

**What evidence would justify expanding the scope?**

**When to pause, revise, or return to the existing process**

Agree the pilot duration, review responsibilities, operating costs, and acceptance criteria before the build. Avoid expanding scope until the limited workflow can be evaluated.

**06 / WORKED EXAMPLE**

# Restaurant voice and text ordering.

Illustrative implementation design: help customers place eligible pickup orders while staff focus on guests. Supported POS access and restaurant rules determine what can be connected.

Workflow: call or message arrives; the current menu and availability are checked; items, quantities, and modifiers are clarified; the customer reviews the basket; the supported order system or staff queue receives the confirmed order; an acknowledgment is sent.

Staff controls: transfer allergy questions, unclear requests, unavailable items, refunds, and unsupported changes. Prices come from business records. Payment follows the restaurant's approved checkout process.

First pilot: one location, a limited pickup menu, and staff review of each order draft. Test noise, interruptions, sold-out items, duplicate messages, changed orders, and failed handoffs.

**Our channels, POS, menu source, hours, and fulfillment rules****Modifiers, unavailable items, allergy questions, and escalation rules****Customer confirmation, payment, and kitchen handoff****Measures: completed orders, corrections, transfers, missed calls, staff effort**

**07 / WORKED EXAMPLE**

# Customer service grounded in your data.

Illustrative implementation design: answer from current approved knowledge, retrieve permitted customer information, and hand unresolved issues to staff with context.

Workflow: a customer asks a question; relevant approved sources are retrieved; identity is checked before account lookup; a supported answer is prepared; unresolved or sensitive requests create a ticket; the receiving agent gets the conversation and attempted steps.

Knowledge setup: connecting company information usually means retrieval, source management, and configuration. Model fine-tuning is a separate decision, not a prerequisite for every knowledge assistant.

First pilot: frequent questions, a reviewed source collection, and a limited audience. Test conflicting policies, missing answers, another customer's account details, and successful staff transfer.

**Approved sources, source owners, and update process****Account verification and permitted customer lookups****When to transfer and which team receives the ticket****Measures: answer accuracy, resolution, repeat contacts, handoff quality**

**08 / SUCCESS AND TESTING**

# Define evidence before acceptance.

Choose measures tied to the actual work. Time freed up, accuracy, completed handoffs, and resolved requests are different outcomes; measure the ones that matter.

**Measure 1: current baseline / desired outcome / evidence / reviewer****Measure 2: current baseline / desired outcome / evidence / reviewer****Measure 3: current baseline / desired outcome / evidence / reviewer**

## Representative acceptance checks

- ☐ A normal request reaches the expected result.
- ☐ Missing or conflicting information enters the review path.
- ☐ Repeated events do not create duplicate records or actions.
- ☐ Users can access only the information their role permits.
- ☐ A failed connection notifies an owner and can be recovered.
- ☐ A customer or employee can reach a person when needed.

**Who signs off, and which unresolved issues block launch?**

**09 / BUDGET AND OWNERSHIP**

# Plan costs and responsibilities.

Separate the implementation budget from ongoing subscriptions, AI usage, messaging, support, and staff review. Estimates are assumptions to validate, not promised savings.

**Implementation budget range and decision-maker****Monthly software, AI, messaging, and other usage costs****Ongoing maintenance, staff review, and support expectations****Timing, milestones, dependencies, and review availability****Account, code, documentation, and deployment ownership****How changes to scope and unexpected work will be agreed**

Use the AlbaHub ROI calculator to explore staff-time value and running costs. Staff time freed up becomes a cash saving only if actual spending changes. Other business benefits need their own evidence.

**[albahub.io/roi-calculator/](https://albahub.io/roi-calculator/)**

**10 / OPERATIONAL READINESS**

# Prepare for launch and handoff.

Use this checklist with the project owner and the people operating the system. Coverage and support responsibilities belong in the written agreement.

- ☐ The written scope and acceptance checks are agreed.
- ☐ Source owners and system permissions are confirmed.
- ☐ Staff have tested normal tasks and important exceptions.
- ☐ Review queues and escalation routes have named owners.
- ☐ Duplicate, failed, and incomplete requests can be handled.
- ☐ Customer-facing messages and commitments are approved.
- ☐ Monitoring, alerts, and operating costs have an owner.
- ☐ A release plan and a way to return to the previous process are agreed.
- ☐ The team has task-focused operating guides and training.
- ☐ Accounts, code, documentation, and credentials have an agreed handoff.
- ☐ Support coverage and a contact route are documented.

**Remaining launch decisions / owners / due dates**

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**11 / CONVERSATION AND NEXT STEPS**

# Make the first conversation useful.

Bring what you know. AlbaHub can help translate the business problem into a practical technical plan, a limited pilot, and a written scope.

## A useful starting packet

- ☐ A short description of the business problem and desired result.
- ☐ A process owner and someone who knows the everyday work.
- ☐ An anonymized example or walkthrough of the current process.
- ☐ System names and the information the workflow depends on.
- ☐ Important exceptions and decisions that need staff review.
- ☐ Any known budget, timing, or operating constraints.

## Questions we want to discuss

## Notes and next actions

Talk with AlbaHub: book a free consultation at [albahub.io/book-audit/](https://albahub.io/book-audit/) or email [info@albahub.io](mailto:info@albahub.io). You can use this workbook with your own team before sharing anything.

**Book a free consultation**