



GRAY CAPITAL AI

PRACTICAL FIELD GUIDE

10 Business Processes Ready for Practical AI

A plain-English guide for identifying repetitive, error-prone, and knowledge-heavy workflows that may be strong candidates for responsible automation.



HOW TO USE THIS GUIDE

Start with the work, not the technology.

The best first AI implementation is usually narrow enough to test, valuable enough to measure, and clear enough for employees to understand. Look for a recurring operating problem before choosing a tool.

01

Repeated

The work happens often enough that small improvements compound.

02

Recognizable

The process follows understandable rules, inputs, and handoffs.

03

Measurable

The current delay, error, cost, or missed opportunity can be observed.

IMPORTANT GUARDRAIL

Do not place privileged legal material, protected health information, passwords, financial account credentials, or sensitive customer records into a public AI tool. Define security, access, human review, and data handling before implementation.

OPPORTUNITY AREAS

Customer response and follow-through

01 Missed-call response and lead intake

WHERE FRICTION SHOWS UP

Calls arrive after hours or while the team is busy. Voicemails lack project details, and the opportunity waits for someone to remember the next step.

PRACTICAL FIRST MOVE

Send an immediate acknowledgment, offer a structured intake link, and assign a named person to review and respond.

MEASURE: Response time; completed intakes; opportunities recovered.

02 Quote and proposal follow-up

WHERE FRICTION SHOWS UP

Proposals are sent, then disappear into inboxes. Follow-up depends on individual memory and varies by employee.

PRACTICAL FIRST MOVE

Trigger a short, respectful follow-up sequence based on proposal status, with a clear handoff when a customer replies.

MEASURE: Follow-up completion; response rate; time to decision.

03 Appointment reminders and rescheduling

WHERE FRICTION SHOWS UP

No-shows and late changes waste capacity. Customers must call during business hours to make a simple change.

PRACTICAL FIRST MOVE

Send timed reminders with one clear confirmation or rescheduling path, while preserving a human exception process.

MEASURE: No-show rate; reschedule completion; staff time saved.



OPPORTUNITY AREAS

Onboarding, knowledge, and reporting

04 Customer or client onboarding

WHERE FRICTION SHOWS UP

Documents, approvals, and introductory information arrive through several channels. Teams repeatedly ask for missing items.

MEASURE: Days to completion; missing-item follow-ups; onboarding errors.

PRACTICAL FIRST MOVE

Create one guided checklist that requests the right information, tracks completion, and alerts the responsible employee.

05 Internal policy and SOP search

WHERE FRICTION SHOWS UP

Employees search shared drives, old emails, and coworkers' memories for the current answer. Outdated versions circulate.

MEASURE: Time to answer; repeat questions; outdated-answer incidents.

PRACTICAL FIRST MOVE

Organize authoritative sources, set permissions, and provide a searchable experience that cites the source and escalates uncertainty.

06 Recurring report preparation

WHERE FRICTION SHOWS UP

Someone copies the same figures into the same format every week or month, then manually checks for omissions.

MEASURE: Preparation time; correction count; on-time delivery.

PRACTICAL FIRST MOVE

Standardize inputs, automate the repeatable assembly, and keep a named reviewer responsible for exceptions and final approval.



OPPORTUNITY AREAS

Documents and customer reactivation

07 Document intake and classification

WHERE FRICTION SHOWS UP

Files arrive with inconsistent names, missing fields, and unclear ownership. Staff spend time opening and routing each item.

PRACTICAL FIRST MOVE

Extract routine metadata, flag missing information, apply consistent labels, and route documents to a human owner.

MEASURE: Routing time; missing-data rate; misclassification count.

08 Past-customer reactivation

WHERE FRICTION SHOWS UP

Valuable relationships sit untouched because the customer list is difficult to segment and follow-up is inconsistent.

PRACTICAL FIRST MOVE

Identify a narrow, appropriate segment and use a permission-conscious outreach sequence with opt-out language and human follow-up.

MEASURE: Re-engagement rate; qualified conversations; opt-outs.



OPPORTUNITY AREAS

Feedback, questions, and approvals

09 Review requests and feedback routing

WHERE FRICTION SHOWS UP

Happy customers are rarely asked for feedback, while concerns surface publicly before the business has a chance to respond.

PRACTICAL FIRST MOVE

Request feedback after a defined service milestone and route concerns privately to a responsible person for resolution.

MEASURE: Request completion; review volume; issue-resolution time.

10 Routine employee questions and approvals

WHERE FRICTION SHOWS UP

Managers answer the same questions and chase routine approvals across email, chat, and paper forms.

PRACTICAL FIRST MOVE

Create a controlled request path with standard information, approval rules, audit history, and clear escalation boundaries.

MEASURE: Approval cycle time; incomplete requests; manager interruptions.



FIRST-USE SCORECARD

Is this process ready for a closer look?

Mark each statement that is true today. Four or more checks usually justify a structured discovery conversation - not an automatic software purchase.

- ☐ The process happens weekly or more often.
- ☐ The same information is entered, copied, or requested repeatedly.
- ☐ Delays, omissions, or inconsistent follow-through create a visible cost.
- ☐ The process has a clear owner and a reasonably consistent desired outcome.
- ☐ A human can review exceptions and remain accountable for final decisions.
- ☐ Success can be measured with time, error, completion, response, or conversion data.
- ☐ The first version can avoid highly sensitive or regulated information.

READING THE SCORE

0-3 DOCUMENT FIRST

Clarify the workflow and establish a baseline before choosing technology.

4-5 INVESTIGATE

A focused discovery conversation may identify a practical first use.

6-7 PRIORITIZE

The process is a strong candidate for structured evaluation and a measured pilot.

Bring us one persistent operational problem.

Gray Capital AI helps established businesses identify, implement, and manage useful AI systems without the hype, confusion, or unnecessary complexity.