

PUBLIC SAMPLE FORMAT

AI Opportunity Brief

A plain-English readout that turns an intake form into a practical first-build recommendation. It names the bottleneck, the likely first workflow, risk flags, and the next decision.

█ SAMPLE ONLY - NOT A CLIENT BRIEF



AUDIENCE

Founder or operator before discovery

PURPOSE

Pick the first useful build

OUTPUT

Briefing, risk notes, next steps

WHAT WE WOULD EXTRACT FROM INTAKE

The business bottleneck

This sample assumes a generic operator business with a real operational bottleneck. The actual brief uses the prospect's own intake answers, public-site context if they consented, and the stack details they named.

Working hypothesis: the first build should not be a broad AI assistant. It should be one narrow workflow that saves the team from repeated context gathering, drafting, and follow-up while keeping human approval for decisions that touch customers, money, or public brand surfaces.

STATED PAIN

Work is stuck between tools

Customer context, order details, notes, and next actions are spread across forms, inboxes, spreadsheets, ecommerce tools, CRM, and support software.

OPERATOR IMPACT

The team waits on manual context

People know what to do, but too much time goes into finding facts, rewriting the same answer, and checking whether the next step happened.

GOOD FIRST USE

Draft, route, and brief

The safest first system prepares the work, shows its sources, and routes the final decision to a human instead of acting alone.

WRONG FIRST USE

Fully autonomous decisions

Do not start by letting AI refund, edit orders, send final customer messages, publish campaigns, or change financial records without review.

Profile fields we confirm

BUSINESS MODEL

Ecommerce, services, advisory, agency, education, hospitality, field services, or other operator workflow.

STACK

Website platform, CRM, helpdesk, email, payment processor, shipping, accounting, analytics, and data source access.

CONSTRAINT

Regulated data, sensitive data, approval rules, budget band, timeline pressure, and who owns final decisions.

WHERE THE FIRST BUILD SHOULD START

Recommended starting point

The brief narrows the project to a buildable first workflow. The goal is not to automate the whole company. The goal is to make one important workflow easier to run and easier to trust.

RECOMMENDED LANE

Custom AI agent with workflow automation

Start with one agent that gathers context from trusted sources, drafts the next action, logs what it used, and sends the result to a human for review. If the public website or intake flow is the real blocker, the brief would route the project to website development first.

AGENT JOB

Prepare the work

- Read the approved source records
- Summarize the situation in plain English
- Draft the next response or task
- Flag missing data and edge cases

HUMAN BOUNDARY

Keep approval gates

- No final sends without review
- No money movement without review
- No public publishing without review
- No regulated data handling until scoped

WHAT WOULD GO INTO THE BUILD

Suggested first-build components

The first build stays narrow on purpose. Each component makes the agent easier to trust before anything gets more autonomous.

- 01 SOURCE MAP.** Confirm which records the agent can read, which records it cannot touch, and which source wins when tools disagree.
- 02 DRAFTING LOOP.** Build the first agent around one repeated output: support reply, lead follow-up, quote prep, daily finance brief, or intake summary.
- 03 APPROVAL AND LOGS.** Add review gates, source links, confidence flags, and a simple record of what the agent did.
- 04 HUMAN REVIEW HABIT.** Review the first real outputs, mark what was useful, and record the reasons a draft needed correction.
- 05 RETAINER DECISION.** After launch, decide whether monthly monitoring, tune-ups, and next-agent rollout make sense.

The point: a strong first build teaches the team how AI behaves inside one real workflow before the business gives it more responsibility.

SCOPE CONTROL

Risk flags we would call out

A useful opportunity brief is honest about what could make the build slower, riskier, or not worth doing yet.

DATA READINESS

Sources may be messy

If policies, product facts, customer records, or accounting exports are inconsistent, the first sprint may need cleanup before agent work can be trusted.

PERMISSIONS

Access must be narrow

Tool access should start read-only where possible. Write access comes later and only for bounded actions with logs and review.

REGULATED DATA

Compliance changes the path

HIPAA, GDPR, financial, legal, medical, or sensitive internal data requires a written handling plan before any records enter the build workflow.

FIT

Sometimes the answer is no

If the workflow is too rare, too vague, too risky, or too small for a custom build, the brief should say so and suggest a lighter path.

What the client gets next

BRIEF

A written recommendation naming the first workflow, the likely build lane, major risks, and what we would confirm on the discovery call.

QUOTE

Builds start at \$5,000 and are custom-quoted after intake and discovery. The quote depends on scope, integrations, data readiness, and approval rules.

LAUNCH

If the project is a fit, the first build moves through fixed-scope work, human review, launch, and optional post-launch support.