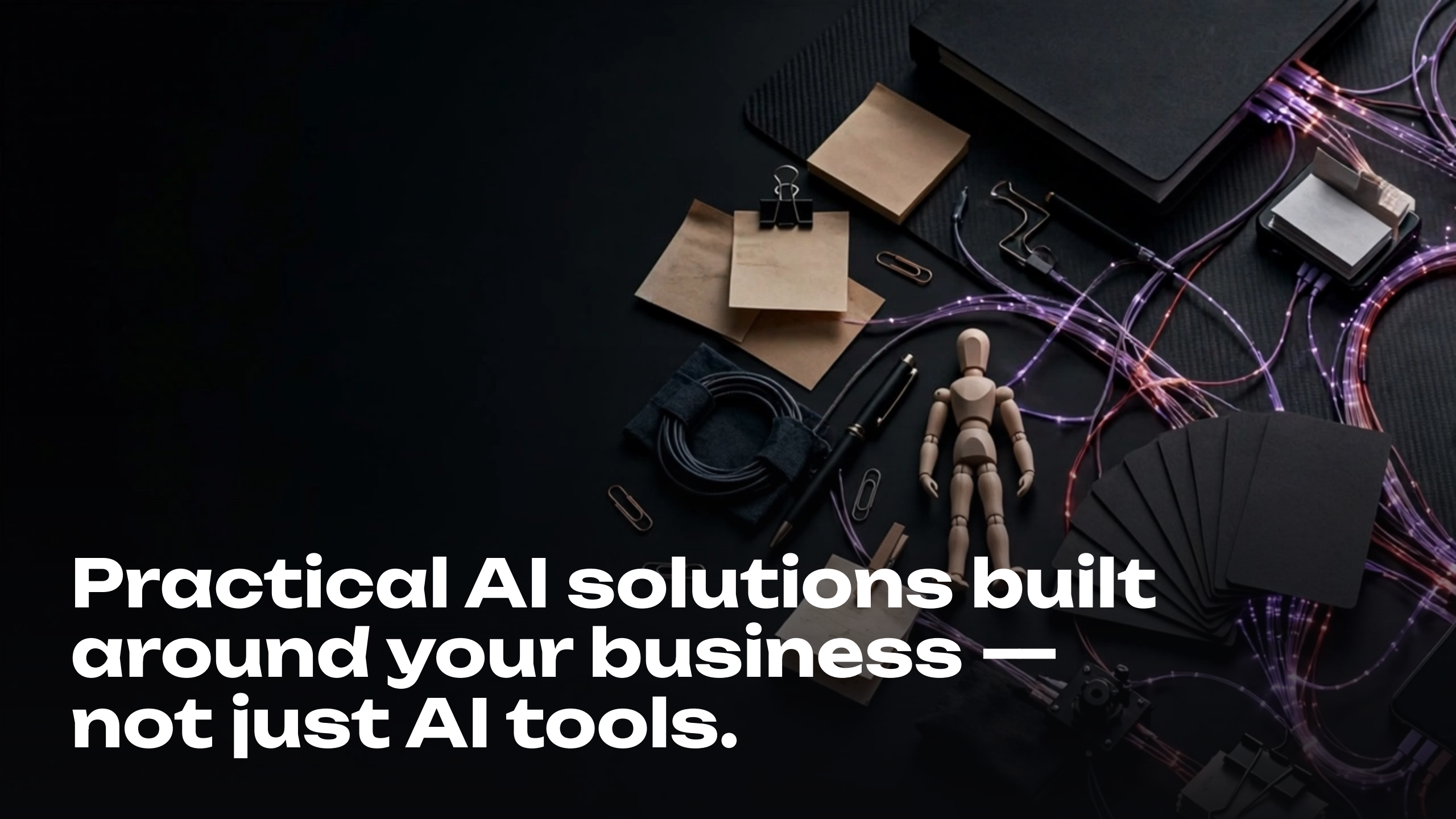




**Practical AI solutions built
around your business —
not just AI tools.**

01

The challenge is not finding AI tools. It is choosing what belongs in the business.

A useful system connects to the work already happening: inquiries, customer questions, follow-up, scheduling, CRM updates and team handoffs.

Naman's rule: If the workflow is not clearer after automation, adding AI did not solve the problem. It only added another login.

02

Delivery history matters more than AI theatre.

94%

Job success

80+

Projects worked on

3,000+

Hours served

\$180K+

Earnings

These figures reflect Naman's freelance-platform work and broader digital delivery history. They are not presented as AI-only project results.

03

AI earns its place where repetitive friction is already costing time or leads.

01 · Leads arrive after hours

02 · The same questions consume staff time

03 · Forms do not trigger follow-up

04 · New inquiries wait too long

05 · CRM records stay incomplete

06 · Handoffs disappear between people

07 · Scheduling creates back-and-forth

08 · Routine content work repeats

09 · Customers cannot see status

10 · Owners cannot see the bottleneck

Six practical lanes. One rule: solve the workflow, not the trend.

AI strategy and integration

Choose the right workflow, tools, ownership and success measure.

Chatbot development

Answer useful questions, qualify inquiries and route the next action.

Lead capture and qualification

Collect better context before a human follows up.

Marketing automation

Trigger timely email, message and campaign workflows.

CRM and workflow connections

Move information between the website, CRM, calendar and team.

AI content and support workflows

Draft, organize and retrieve approved information without losing review control.

A lead should not have to wait for the business to notice it.

**01****Capture context**

Ask the questions that determine fit and urgency.

02**Route intelligently**

Send the inquiry to the right person, inbox or CRM stage.

03**Follow up promptly**

Confirm receipt and keep the next step clear.

06

The website becomes a command surface — not another isolated form.

Website

Inquiry and intent

AI layer

Answer and qualify

CRM

Store and assign

Calendar

Book the next step

Team

Review and act

The point: fewer dead ends between interest and a real human response.

07

**Automation
handles
repetition.
People keep
judgment.**

01

Approved knowledge

The system answers from defined business information.

02

Clear escalation

Pricing exceptions, complaints and complex questions reach a person.

03

Visible ownership

Every routed task has a destination and responsible owner.

04

Reviewable history

The team can inspect what happened and improve it.

Start with the smallest system that can prove value.

Tool-first build

- Buys a platform before mapping the work
- Automates exceptions too early
- Adds complexity across the whole business
- Measures activity instead of usefulness

Workflow-first build

- Starts with one repetitive business problem
- Defines the human handoff
- Connects only what the workflow needs
- Expands after the first system works

Four steps from messy workflow to working system.

01

Discover

Map the workflow, owners, tools and friction.

02

Design

Define logic, exceptions, data and handoffs.

03

Build

Connect, test and document the system.

04

Prove

Measure useful outcomes and refine.

10

Discover the real workflow before recommending the AI layer.

01

Trace the current path

Where information enters, waits, changes hands and gets lost.

02

Name the owner

Who acts when the system routes an exception.

03

Define the useful outcome

Faster response, cleaner data, fewer repetitive tasks or better qualification.

Design the logic around people, tools and exceptions.

Inputs

Questions, forms, documents, CRM fields and approved knowledge.

Rules

Qualification, routing, permissions and escalation.

Outputs

Replies, tasks, records, bookings and notifications.

Ownership

Human review points and maintenance.



Build for the real environment, not a perfect demo.

What gets connected

- Website and forms
- CRM and contact records
- Email, SMS or approved messaging
- Calendar and team notifications

What gets tested

- Normal questions and unclear requests
- Bad data and missing fields
- Escalations and failed connections
- Mobile use and owner handoff

Optimization starts after real users touch the workflow.

Usefulness

Did the system help someone complete the next step?

Accuracy

Were answers, records and routes dependable?

Adoption

Did the team actually use and trust the workflow?

Naman's rule: Volume is not proof. A smaller automation that the team trusts is worth more than a large system nobody wants to touch.

14

Choose the scope that matches the workflow today.

Naman's rule: The scope can start small, but the expectation stays honest. A chatbot is a chatbot. A connected automation project includes the integrations, testing and handoff it actually needs.

01

One-time chatbot build

A defined customer-facing use case with a documented handoff.

02

Automation setup project

A connected workflow across the website, CRM, messaging or calendar.

03

Ongoing optimization

Review, tuning and measured expansion after launch.

One-time chatbot builds are priced around what the bot must actually do.

Focused chatbot build

\$3,000–\$5,000

One primary use case, approved knowledge, basic lead capture, escalation path and launch testing.

Connected chatbot build

\$5,000–\$10,000

Multiple intents, qualification logic, CRM or calendar connection, routing and documented handoff.

Advanced AI assistant

\$10,000+

Broader knowledge, multi-step workflows, deeper integrations, permissions and structured testing.

Setup and optimization are separate decisions.

Full automation setup project

Custom pricing

Workflow map, integration build, exception logic, testing, documentation and team handoff.

- Defined one-time scope
- Specific systems and exclusions
- Launch criteria agreed upfront

Flexible engagement options

Use an hourly engagement for focused technical work, or add ongoing optimization after launch when the workflow needs active tuning.

Hourly engagement – priced to the defined technical scope

Monthly optimization – custom contract after launch

- Monthly priority list
- Change log and review
- New builds scoped separately

The final quote changes when the system has more places to think, connect or fail.

- Number of workflows and decision branches
- Systems, APIs and account access involved
- Knowledge preparation and content cleanup
- Data sensitivity, permissions and approval rules
- Testing depth, documentation and team training
- Custom design, multilingual behavior or ongoing support

Scope-first close: the written proposal names the workflow, systems, deliverables, exclusions, review points and launch criteria before work is funded.

Six questions to settle before the first build.

What can AI automate?

Repetitive, rules-based work around inquiries, information, routing, follow-up and internal handoffs.

Can it work with our current tools?

Often, yes. The first phase confirms available integrations, access and practical limits.

How long before it works?

Timing depends on workflow depth, integrations, content readiness and review speed; the proposal defines milestones.

Will this replace my team?

The goal is to remove repetitive friction while keeping judgment, approvals and exceptions with people.

How much access is required?

Only the systems needed for the approved workflow, with permissions scoped to the build.

What happens after launch?

The business can take the documented handoff or continue with an optional optimization scope.

Bring the workflow. Leave with the right first build.

No pressure. No technical jargon.

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