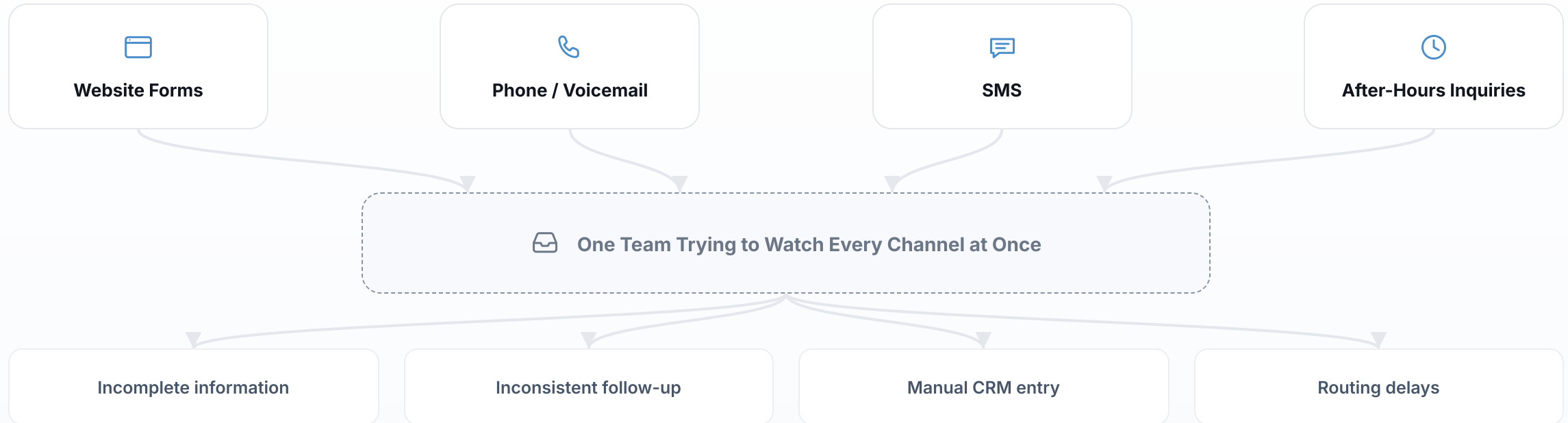


AI AGENT WORKFLOW

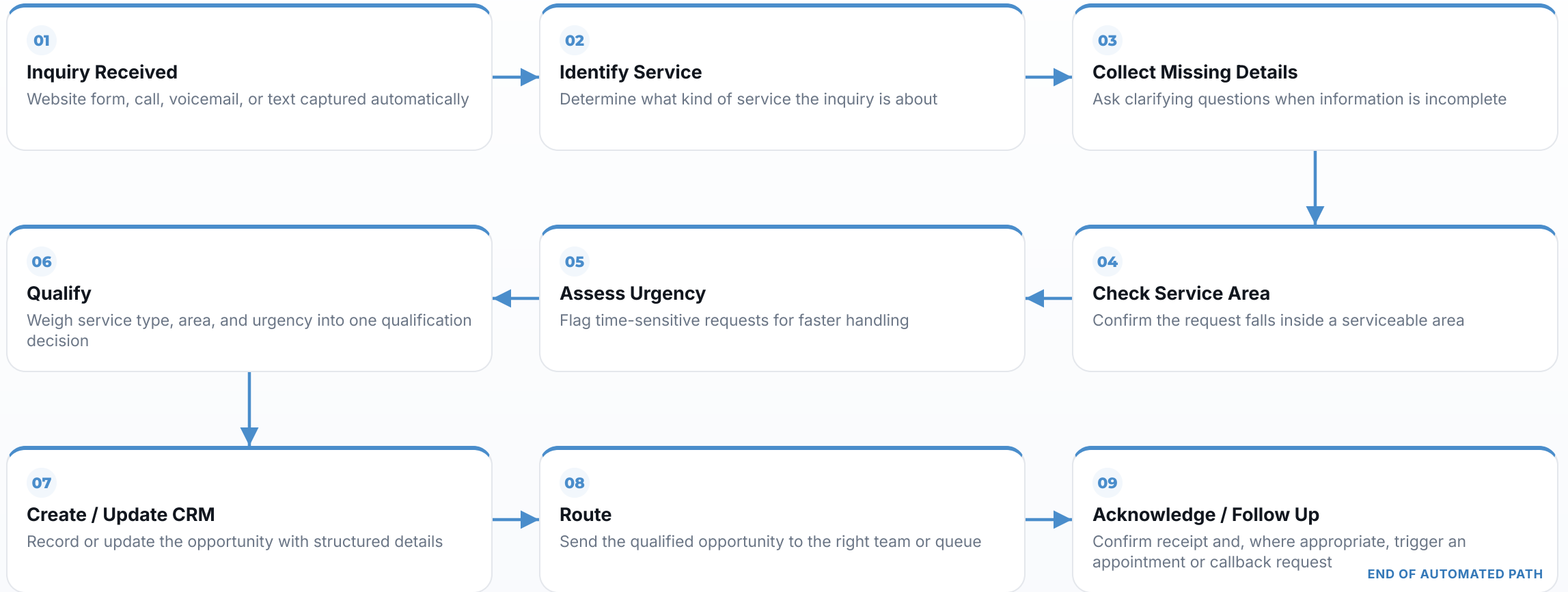
From New Inquiry to the Right Next Action

An illustrative look at how an AI agent can help a Detroit home-services business capture, qualify, route, and follow up with incoming opportunities while keeping human judgment in the loop.

Leads Arrive in More Places Than One Team Can Watch at Once.



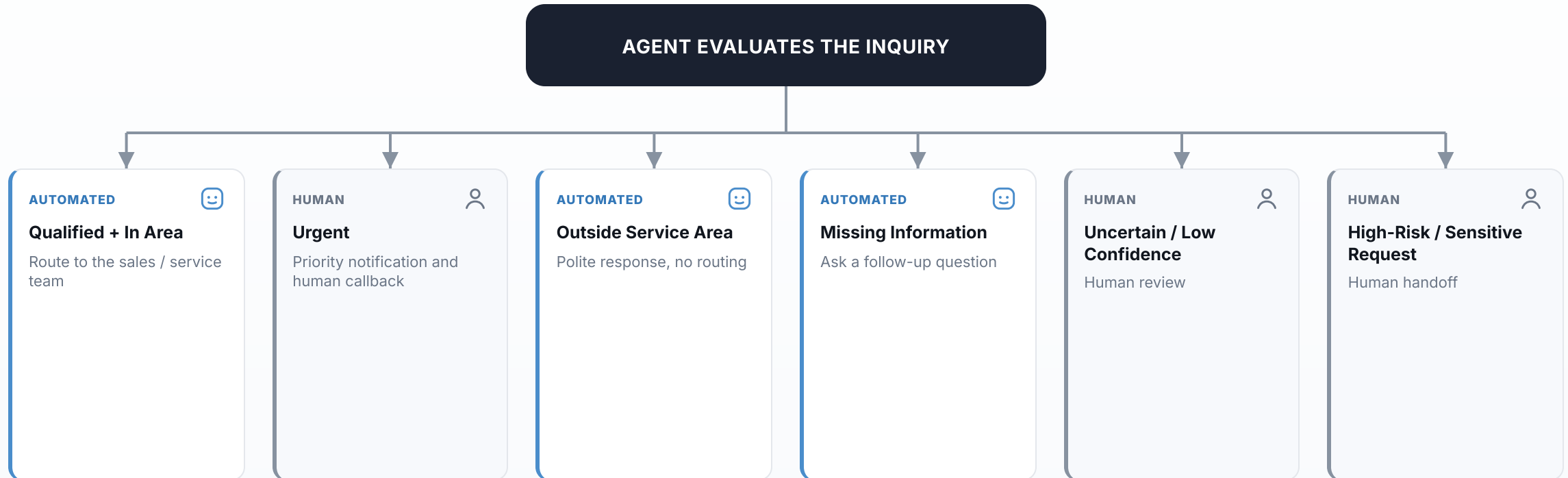
How an Inquiry Becomes a Qualified, Routed Opportunity.



Uncertain or high-risk cases branch to a human at multiple points in this path — see the next page.

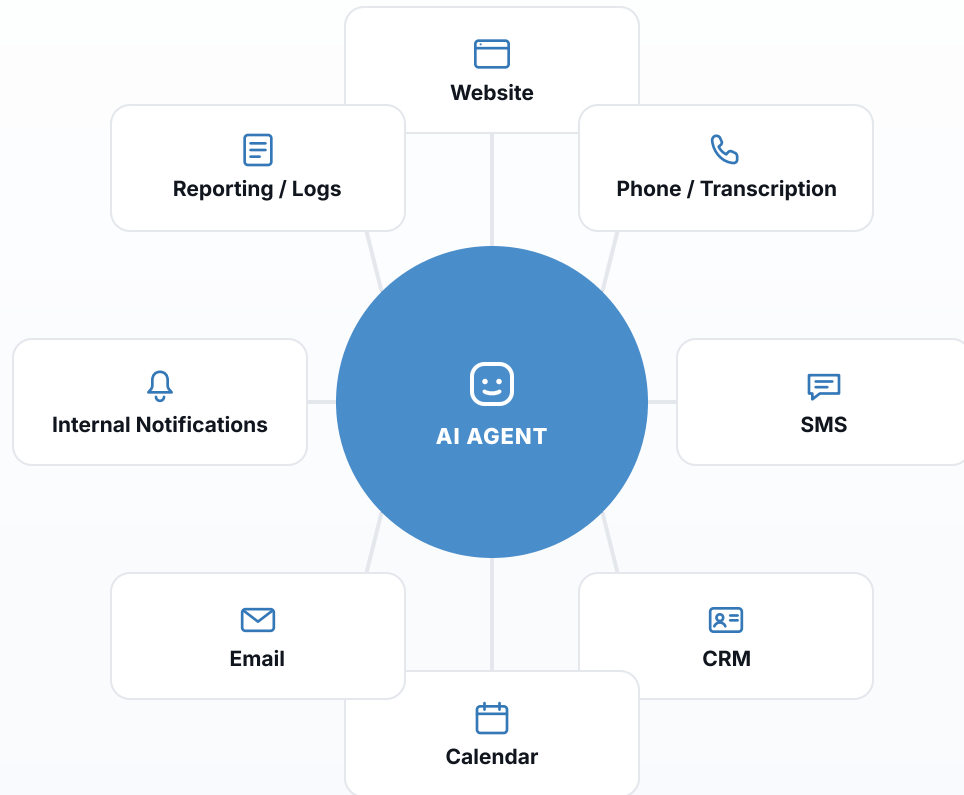
Automation Handles the Routine. People Handle the Judgment.

■ Automated step ■ Human handoff



The agent narrows and routes; it does not make regulated decisions, and it does not replace the team — judgment calls are handed to a person.

The Agent Works Across the Systems the Business Already Uses.



WHAT THE AGENT DOES ACROSS THESE SYSTEMS

- Reads approved inputs from each connected channel
- Writes structured data back to the CRM
- Triggers the next workflow step (routing, callback, follow-up)
- Records each action it takes
- Maintains an audit trail for later review
- Hands off to a person whenever judgment is required

A Reliable AI Agent Starts With a Clear Operating Process.

Business Rules

Clear definitions of service area, urgency, and what counts as a qualified opportunity.

Data Access

Approved, scoped access to the systems the agent needs to read and write.

Integrations

Reliable connections to the CRM, calendar, phone/SMS, and notification systems in use.

Escalation Logic

Explicit rules for when a case goes to a person instead of being handled automatically.

Testing & Oversight

Ongoing review of agent behavior before and after launch.

Want to explore where an AI agent could fit into your operation?

Talk to NWWS

WORKFLOW NOTE

This workflow is an illustrative portfolio presentation created by New World Web Solutions to demonstrate AI agent architecture, automation logic, and human handoff design. The business identity and workflow configuration shown are illustrative and are not presented as an actual client deployment. Real implementations vary based on business processes, systems, integrations, policies, and operating requirements.