



Not all AI companies are built the same. Here's what to look for before you sign anything.

### 01 Do they start with strategy or jump straight to tools?

A good partner asks about your business before they pitch a solution. If the first conversation starts with a product demo, that's a red flag. Look for someone who listens first, understands your workflows, and builds a plan before they build anything else.

### 02 Do they build for your workflows or chase the latest shiny object?

The right partner designs around how your team actually works, not whatever tool is trending this month. Ask how they decide what to recommend. If the answer is always the same platform regardless of the problem, keep looking.

### 03 Can they work across all your software and systems?

Your business doesn't run on one tool. Your partner shouldn't either. Look for experience across CRMs, scheduling tools, communication platforms, billing systems, and more. The best automations connect what you already use, not replace everything.

### 04 Do they train your team or just hand over the keys?

A system your team doesn't understand is a system they won't use. Ask about onboarding, training, and change management. The right partner makes sure your people are confident, not just your software.

### 05 Will they be there after launch?

Launch is the starting line, not the finish. Your business will evolve, and your automations need to evolve with it. Ask about ongoing support, optimization, and what happens when something breaks at 9 PM on a Tuesday.

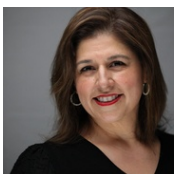
### 06 Can they show you real results and references?

Anyone can promise results. Ask to see actual examples of what they've built and who they've built it for. Talk to their clients. A partner with real experience will have stories, numbers, and references ready, not just a polished pitch deck.

Ready to partner with someone who gets it right?

We'll help you evaluate, plan, build, and grow.

[Chat with Vivian →](#)



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*Making AI and CRM work for your team,  
not against it*