

AI WORKFLOW TRANSFORMATION AND AUTOMATION

Improve the workflow with the right mix of automation and AI.

Redesign one workflow, run a pilot with defined access and approval requirements, and compare the results with the baseline your team agreed.

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- ☐ 01 DECIDE
Choose the question
 - ☒ 02 REDESIGN
This engagement
 - ☐ 03 GOVERN
Set the boundaries
 - ☐ 04 SCALE
Expand, revise, or stop

01 THE DECISION

Reviews, routing, and handoffs can consume time without improving the result. Before changing the work, you need to understand the delays, the exceptions, and the decisions people must retain.

We map the current workflow and choose the simplest useful combination of process changes, rules, and AI. We agree the pilot scope, human reviews, access limits, and logging requirements with your team. Your security lead reviews those limits before the pilot uses production data.

You receive the Workflow Transformation Blueprint, a working pilot within the agreed scope in your environment, and a measurement record comparing results with your baseline. Together, these support a decision to expand, revise, or stop.

Bring H2H in when

- A high-volume workflow costs too much to operate or requires proportional headcount growth.
- Customers or employees wait too long because reviews, routing, handoffs, or information gathering remain manual.
- Existing AI pilots have not changed a meaningful operating measure.
- The organization needs to improve capacity without weakening quality, approvals, or exception handling.

What we need from you

- A named workflow owner with the authority to change how the work runs.
- A problem you can measure through volume, cycle time, cost, or error rate. If a baseline is missing, we agree how to establish it.
- Access to the operators who do the work, and read access to the systems it runs through, under accounts you issue at your least-privilege standard.

AT A GLANCE

DECISION

Which workflow can AI change without new exposure?

PHASE

02 · Redesign

DELIVERABLES

Baseline brief · Workflow Transformation Blueprint · working pilot · measurement and next-decision record

ENDS WITH

Scale the redesign, revise it, or stop.

OWNER ON YOUR SIDE

The workflow owner who accepts how daily work changes

SECURITY SIGN-OFF

Data access, tools, actions, and logging reviewed with your security lead before the pilot uses production data

DELIVERED BY

H2H Technology (vendor), with your team (customer)

02 HOW IT RUNS

Three steps. A checkpoint after each one where you can stop with something in hand.

- 01 BASELINE Map the work as it runs today**

What happens	Document the workflow in scope: volume, measures, exceptions, constraints, sensitive data, and actions that require approval.
Your involvement	The owner and the operators who do the work, in working sessions; read access to the systems the work runs through.
Checkpoint	Baseline brief signed by the owner. You can stop here and keep the brief.
Output	Baseline brief: current work volume, effort and cycle time, exception rate, known constraints, sensitivity map.
- 02 TRANSFORM Redesign the work and run the agreed pilot**

What happens	Implement the agreed process changes, automation, and AI. Define the policy checks, human approvals, and records needed for each AI step in scope.
Your involvement	The owner reviews the future-state design; your security lead reviews the data, tool, and action boundaries; operators run the pilot.
Checkpoint	Security review before the pilot uses production data. The pilot stays within the agreed scope and volume.
Output	Workflow Transformation Blueprint; the agreed pilot running in your environment, under your accounts.
- 03 PROVE Compare what happened with what was agreed**

What happens	Compare pilot results with the baseline, target, and quality and control requirements. Review the recorded exceptions, overrides, and any gaps in the evidence.
Your involvement	The owner, the sponsor, and your security lead attend the closing review.
Checkpoint	Next-decision record: scale the redesign, revise it, or stop.
Output	Measurement record and next-decision record, with the evidence behind the recommendation.

03 WHAT YOU GET

Four deliverables, each with an acceptance test you can apply.

DELIVERABLE	WHAT IT CONTAINS	FORMAT	ACCEPTED WHEN
1 Baseline brief	Current volumes, effort and cycle time, exception rates, constraints, and a map of where sensitive data and consequential actions appear.	PDF plus the source workbook	The owner confirms it describes the work as it runs today.
2 Workflow Transformation Blueprint	Current and proposed workflow; handoffs and exceptions; access, tool, and action limits; human approvals and logging requirements for the steps in scope; implementation backlog.	PDF, editable diagrams, backlog in your tracker	The owner and your security lead sign the design review.
3 Working capability	The redesigned workflow running within the agreed pilot scope, with users testing its review and exception handling.	Deployed in your tenant, under your accounts, with a runbook	The pilot runs the agreed volume with every review point exercised at least once.
4 Measurement and next-decision record	Pilot results against the agreed baseline; recorded exceptions, overrides, and evidence gaps; a recommendation to expand, revise, or stop.	PDF plus data export	The sponsor receives it at the closing review.

04 HOW IT ENDS

Scale the redesign, revise it, or stop.

Scale

The pilot meets the agreed measures and review criteria. Define the scope, controls, and responsibilities for a broader rollout.

Revise

Some steps worked and others did not. Change the rule, the AI step, or the review point, and measure again.

Stop

The evidence does not justify continuing this change. Keep the findings and baseline, and agree how to end the pilot.

Not included

- Guaranteed performance improvement. The measurement record shows what happened; it does not promise a number in advance.
- Unrestricted autonomous action. Actions identified as consequential keep their agreed approval requirements throughout the pilot.
- Replacement of systems without an agreed need, and any work outside the one workflow named at kickoff.

Exact scope, participants, timing, and fees are confirmed in the statement of work. Changes after kickoff go through a written change note before work continues.

05 HOW WE WORK INSIDE YOUR ENVIRONMENT

What your security and procurement teams will ask.

Access and data

- A mutual NDA precedes discovery.
- You keep your own data.

Controls and frameworks

For AI and automation steps in scope, we document permitted data access, tools and actions, human approvals, and logging requirements. We agree what records are needed and how access and retention are handled, then connect these decisions to your control framework. Where relevant, we map the agreed controls and evidence to NIST AI RMF, ISO/IEC 42001, and OWASP guidance for LLM and agentic applications. H2H does not certify compliance or guarantee an audit outcome.

Who does what

ROLE	BASELINE	TRANSFORM	PROVE
Workflow owner (customer)	Accountable: baseline brief	Accountable: future-state design	Accountable: scale, revise, or stop
Security lead (customer)	Consulted: sensitivity map	Approves boundaries before go-live	Reviews trace and exception record
Operators (customer)	Working sessions	Run the pilot	Report exceptions and overrides
Sponsor (customer)	Informed	Informed at design review	Receives next-decision record
H2H (vendor)	Responsible: baseline brief	Responsible: blueprint and pilot build	Responsible: measurement record

Assumptions

- One workflow, one owner. A second workflow is a second engagement or a written change note.
- A measurable current state exists or can be established during Baseline.
- The systems the workflow runs through expose the access the pilot needs, under your accounts.

Where Tutela fits

Optional, not required. If the pilot involves agent tool use or sensitive data, we evaluate whether Tutela Agentic Security by H2H supports the required policies and integrations. Tutela is customer-owned, deployed in your environment, and available on AWS Marketplace. The Blueprint defines the controls whether or not Tutela is selected.

Thirty minutes. Bring the workflow you're worried about.

No deck. We look at the workflow, the data it touches, and who has to approve it, and tell you whether this engagement is the right next step.



Book a conversation

calendly.com/cortez-h2htech
or scan the code to open the calendar

DELIVERED BY

H2H Technology

H2H brings workflow design, engineering, and AI governance together. We help you decide what deserves investment, implement the agreed work, and review the evidence for what comes next.

OTHER BRIEFS IN THIS SERIES

AI Opportunity & Value Sprint · AI-native Product Development · AI Governance and Agentic Security