

AI-Assisted Discovery Follow-Up Workflow

PORTFOLIO PROJECT | AI INTEGRATION & WORKFLOW AUTOMATION

PROJECT OVERVIEW

Smart PBA Solutions designed and tested an AI-assisted workflow to streamline post-consultation follow-up communications. The solution combines structured business processes, AI-supported validation, and human oversight to improve consistency, accuracy, and control.

BUSINESS CHALLENGE

Preparing personalized follow-up communications after discovery consultations requires reviewing prospect information, confirming approved next steps, and drafting accurate messages. This manual process can be time-consuming and creates opportunities for inconsistent communication, missing information, unsupported assumptions, and unintended commitments.

A structured approach was needed to reduce repetitive drafting activities while maintaining appropriate controls over prospect information and business decisions.

SOLUTION OVERVIEW

Smart PBA developed the Discovery Follow-Up Specialist, an AI-assisted workflow that uses an owner-approved Discovery Follow-Up Record and supporting documentation to prepare review-ready email drafts.

- Validates required information and drafting authorization.
- Verifies prospect identity, discovery details, and approved acknowledgment points.
- Identifies missing, conflicting, or unsupported information.
- Stops drafting when critical validation requirements are not met.
- Generates a controlled follow-up draft with applicable flags and source traceability.

HUMAN OVERSIGHT

The owner retains authority over prospect disposition, next steps, commitments, and final communication. No emails are automatically sent.

WORKFLOW AT A GLANCE



Blocking conditions stop the workflow before client-facing draft content is generated.

IMPLEMENTATION & SAFEGUARDS

The workflow uses defined authorization requirements, source validation, exception handling, and human oversight to support controlled prospect communications.

- **Authorization Controls:** Requires explicit owner authorization before drafting.
- **Information Validation:** Verifies required fields, prospect identity, discovery details, and approved sources.
- **Exception Handling:** Stops for blocking conditions; flags non-blocking issues without guessing.
- **Information Protection:** Excludes unapproved internal business information from prospect-facing drafts.
- **Human Decision-Making:** Preserves owner authority over commitments and final communication.

TESTING & VALIDATION

The workflow underwent structured testing using simulated business scenarios to evaluate normal operations, exception handling, data accuracy, and authorization controls.

TEST SCENARIO	VALIDATED RESULT
Normal workflow	Generated a follow-up draft using approved information while excluding internal business details.
Missing information	Flagged unsupported details without inventing content.
Authorization / conflicts	Blocked drafting for failed authorization, required-field, identity, or consistency checks.
Output refinement	Refined the draft-length rule and successfully completed retesting.

RESULTS & BUSINESS VALUE

Testing confirmed the workflow's ability to validate information, identify exceptions, and generate controlled follow-up drafts. The solution establishes a structured, repeatable process designed to improve communication consistency, strengthen information controls, and reduce repetitive drafting activities. Future implementation will allow measurable efficiency improvements to be evaluated.

TOOLS & FUTURE ENHANCEMENTS

Technology: Claude | Google Workspace

Future Enhancements: Evaluate performance during live operations, measure drafting and review efficiency, and explore additional safeguards for supporting documentation and follow-up activities.