

AI Process Automation: 10 Critical Lessons Before Getting Started

WHAT MOST BUSINESSES GET WRONG—
AND HOW TO DO IT RIGHT!

SWIPE



Intellifold
Process Mining & AI



1. Clients *Might* Think They Know—But Data Tells the Truth

✗ The Problem: Clients have ideas about automation but lack clarity on what will bring the most benefit.

✓ The Fix:

✓ Use data, not assumptions, to validate automation opportunities.

✓ High-volume, rule-based tasks are usually the best starting point.

💡 Tip: Always quantify the potential benefits before deciding what to automate.

KEEP SWIPING





2. AI Can't Fix a Bad Process—It Just Automates the Mess

✗ The Problem: Poorly structured processes lead to poor AI performance.

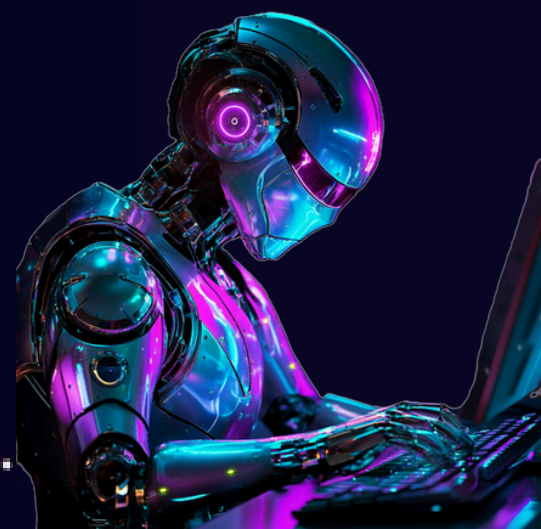
✓ The Fix:

✓ Clearly define each step, input, and expected output before introducing AI.

✓ Use Process Mining to fix process issues and quantify inefficiencies before automating them.

💡 Tip: AI amplifies both strengths & weaknesses—make sure your process is solid.

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3. AI is a Tool, Not a Magic Fix— Prove the ROI

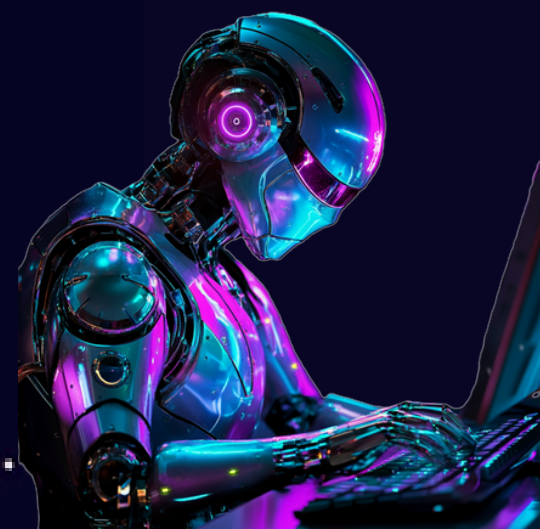
✗ The Problem: AI is often applied without business justification and not every process needs AI

✓ The Fix:

- ✓ Clearly define expected benefits, cost savings, and efficiency gains.
- ✓ Track KPIs before & after AI implementation to see success in action.

💡 Tip: If the ROI isn't clear, rethink whether AI automation is the best solution.

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4. Don't Chase the Holy Grail of Full Process Automation

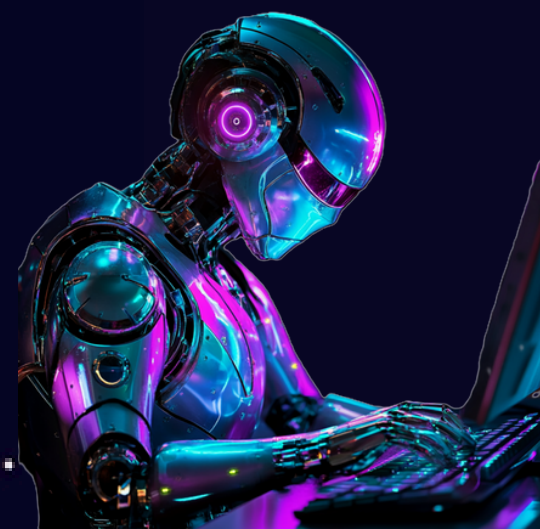
✗ The Problem: Companies aim for fully autonomous processes but fail to scale successfully.

✓ The Fix:

- ✓ Start with ONE AI agent—test, optimise, and expand gradually.
- ✓ Understand that scaling AI increases complexity.

💡 Tip: Scaling is hard. Get one use case right before adding more AI agents.

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5. AI is Not an Employee —It's a Digital Worker

✗ The Problem: AI isn't a human assistant—it follows strict logic.

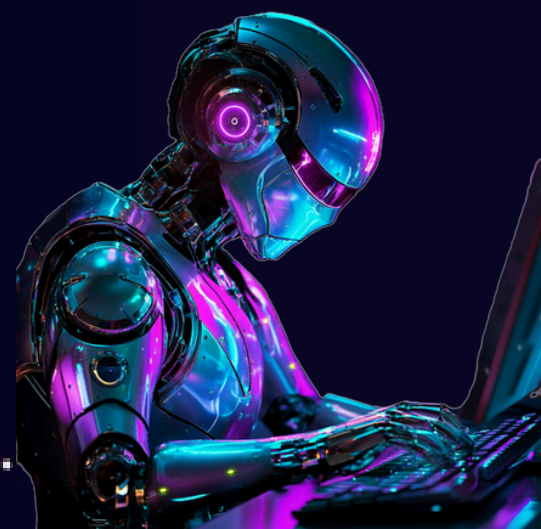
✓ The Fix:

✓ Provide clear, structured instructions with well-defined inputs and outputs.

✓ Reduce complexity—simple, defined tasks and examples improve AI accuracy.

💡 Tip: Poor instructions = Poor results. Narrow the focus and train AI with precision.

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6. AI is Only as Good as Your Data

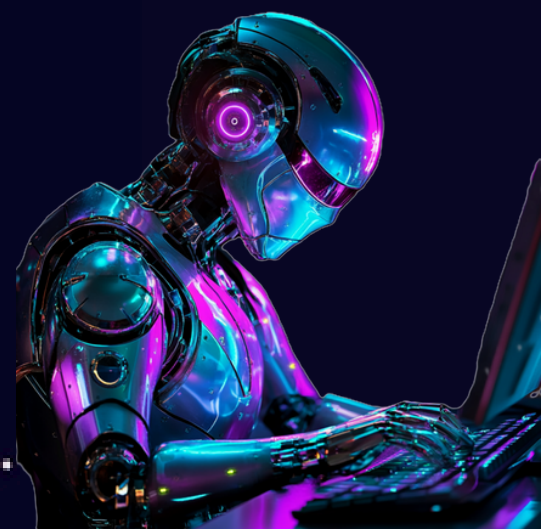
✗ The Problem: Unclean or ambiguous data can ruin AI performance.

✓ The Fix:

- ✓ Establish data governance to maintain clean and structured inputs.
- ✓ Monitor for data inconsistencies that could break AI logic.

💡 Tip: Even a small amount of bad data can throw AI completely off track. Build exception scenarios.

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7. AI Without Tools is Just a Smart Observer

✗ The Problem: AI can process data, but without system connections, it can't take action.

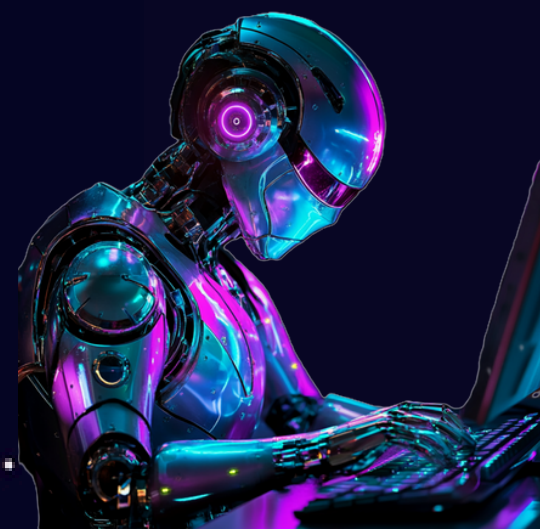
✓ The Fix:

✓ Connect AI to ERP, CRM, workflow systems and other tools for real automation.

✓ Define clear decision paths for AI to follow and how tools can be used under the scenario.

💡 Tip: AI isn't useful if it can't interact with your business environment.

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8. The LLM Works— Your Implementation Might Not

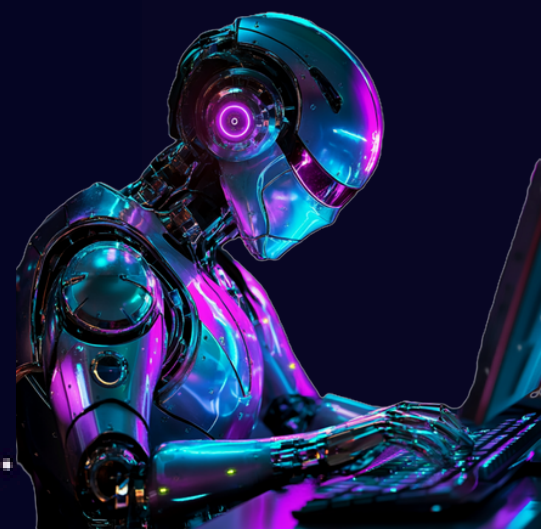
✗ The Problem: AI isn't failing—the way it's built and trained is.

✓ The Fix:

- ✓ Focus on clear instructions, model refinement, and high-quality data. Use clear examples for the LLM.
- ✓ Fix poorly designed workflows before blaming the AI.

💡 Tip: Most AI failures are human-made—fix the design, fix the results.

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9. AI is Not 'Set & Forget' — It Needs Maintenance

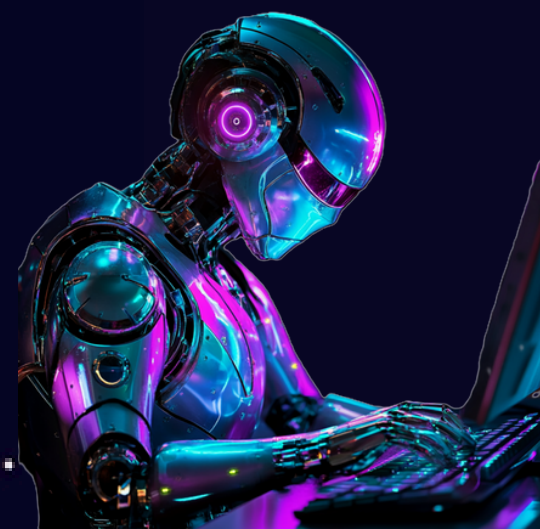
✗ The Problem: AI models degrade without updates & monitoring, especially in a changing environment.

✓ The Fix:

- ✓ Regularly evaluate and where needed retrain models to improve accuracy.
- ✓ Ensure unexpected inputs get redirected to human oversight.

💡 Tip: AI maintenance is like software maintenance—it never stops.

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10. Define the Rules Before AI Starts Making Decisions

✗ The Problem: AI shouldn't operate without clear governance.

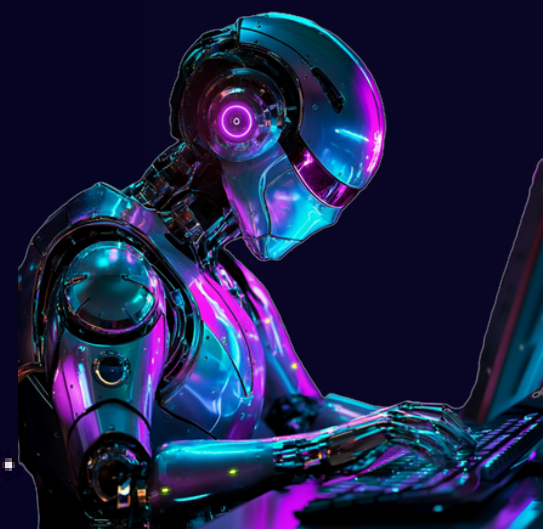
✓ The Fix:

✓ Establish which data is used, what decisions AI can make, and what requires human oversight.


✓ Log output from every AI decision step to ensure auditability & compliance.

💡 Tip: AI explainability is critical for trust, compliance, and debugging.

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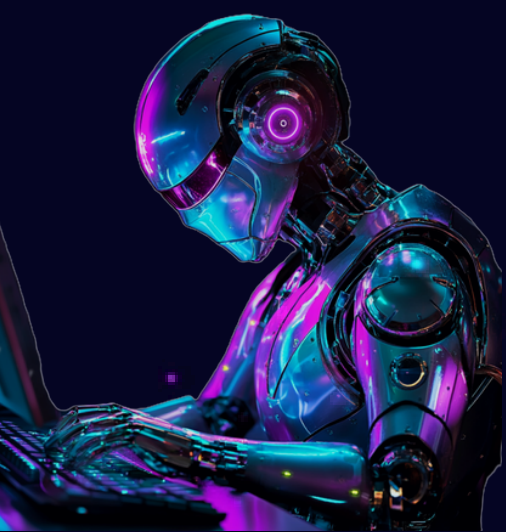




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