

FORMA · WHERE AI IS ACTUALLY WORTH IT

# 6 PLACES AI ACTUALLY PAYS OFF.

Six everyday jobs where AI quietly saves real hours — and the one rule that keeps it from being dropped a month later: start with one, not ten.



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FOUNDERS · FORMA

SOURCE: S&P GLOBAL, 2025

# 42%

of companies dropped most of their AI last year — up from 17% the year before. Usually not because it failed, but because they tried to do everything at once. The fix is simple: pick one painful job, make AI great at it, then move on. Here are the six jobs people ask us for most.

PICK THE ONE THAT HURTS MOST

# THE SIX, ON ONE SCREEN.

- 01 Customer support, 24/7** →  
Answers the repeat questions instantly — hands the rest to a human.
- 02 Ask your documents** →  
A search box over your own files that answers in plain words, with the source.
- 03 Lead intake & qualifying** →  
Replies to a new lead in seconds, asks the right questions, books the call.
- 04 Documents & contracts** →  
Reads the long PDF and flags the risky lines before you sign.
- 05 Inbox & scheduling** →  
Drafts the reply, proposes times, holds the slot — you just tap OK.
- 06 Reports & analytics** →  
A short written brief on your numbers, waiting in your inbox by 8am.

FRONT-OF-HOUSE: SUPPORT &amp; SALES

# WHERE CUSTOMERS FEEL IT FIRST.

## 01 Customer support, 24/7

Handles the questions you answer a hundred times a week, day or night, and quietly passes the tricky ones to a person.

**74%** of buyers expect always-on help · Zendesk, 2026

## 02 Ask your documents

One search box over your handbooks, specs and policies — plain-word answers with the page it came from, not a guess from the internet.

**1.8h** a day lost just searching for info · McKinsey, 2012

## 03 Lead intake & qualifying

Replies to a new enquiry in seconds, asks the qualifying questions, and books the call while interest is still hot.

**7×** likelier to qualify if you reply within the hour · HBR, 2011

BACK-OF-HOUSE: PAPERWORK &amp; NUMBERS

# WHERE THE HOURS QUIETLY GO.

## 04 Documents & contracts

Reads the 40-page PDF nobody has time for and flags the clauses that cost money — auto-renewals, liability, odd dates — before a human signs.

**8.6%** of revenue lost to poor contract handling · WorldCC + Deloitte, 2023

## 05 Inbox & scheduling

Drafts the reply, proposes real open times, holds the slot — then waits for your OK before anything is sent.

**28h** a week on email, search & coordination · McKinsey, 2012

## 06 Reports & analytics

Pulls your numbers overnight and writes a short, readable brief — what moved, what didn't, what to look at — waiting by 8am.

**8am** brief, written before the team logs on · FORMA, in production

SIX DIFFERENT JOBS · THE SAME FIVE STEPS

# FIVE SIMPLE STEPS.

**STEP 1** **It gets the request**  
An email, a question, a form or a file comes in.



**STEP 2** **It checks your files**  
It looks the answer up in your documents — not the open internet.



**STEP 3** **It writes the answer**  
A reply, a summary or a report — based on what it actually found.



**STEP 4** **You check it**  
A person approves anything that matters before it goes out.



**STEP 5** **It sends and files it**  
Off it goes, logged and ready for the next one — day or night.

WHAT IT WON'T DO — ON PURPOSE

## WHERE WE DRAW THE LINE.

- It never invents facts. No source in your documents, no answer — it says so instead of guessing.
- It never sends or signs on its own. Anything that reaches a client or a contract waits for a human OK.
- It runs on your servers. Your data stays yours, the code is handed over — nothing held hostage.

THREE QUESTIONS, THEN PICK ONE

# START WITH ONE, NOT TEN.

## **1** Which job do you repeat 3+ times a week?

The boring, repetitive one is the best first candidate — not the flashiest.

## **2** Can you tell when it's done right?

If there's no clear way to check the output, fix that before automating it.

## **3** Who on your side owns it?

One named person to judge the result. No owner, no rollout.

Pick one of the six, answer these three, and you've got a real pilot. Unsure which? That's exactly what the free mapping session is for.

WHEN YOU'VE PICKED YOUR ONE

# READY TO MAP YOUR **FIRST ONE?**

Book a 30-min discovery call. We map one workflow, free — and on roughly 1 in 5 calls we'll tell you not to build it.

→ [agencyforma.com](https://agencyforma.com)

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Founders, FORMA — we run the call ourselves.

↗ SAVE & SEND THIS TO YOUR PARTNER