

FORMA · FOR B2B TEAMS WEIGHING AI

# FROM FIRST CALL TO AN AGENT YOU OWN.

The exact path we walk to put one working AI agent inside your company — on your own servers. Read it with your partner and decide if it's for you. No pitch, just the map.

THE REAL REASON

# AI DOESN'T FAIL. THE **PLAN** DOES.

Teams buy a tool, point it at a vague goal, and quietly drop it a month later. The tech was fine — there was never a map: which process, who owns it, and what "done right" actually means. This document is that map.

SOURCE: S&amp;P GLOBAL, 2025

# 42%

of companies scrapped most of their AI last year — up from 17% the year before. Not because the AI didn't work. Because it got pointed at the wrong process, with no plan to make it stick. A roadmap is the fix.

FIVE PHASES · ~8 WEEKS, TYPICAL

# THE ROADMAP, TOP TO BOTTOM.

00

**Map** WEEK 0 · FREE

A working session on the process eating your time. You leave with a written map.

01

**Pilot** 14 DAYS

One working agent goes live on your servers — real work, not a demo.

02

**Prove** WEEKS 2-4

We measure it against a clear "done right" before anyone leans on it.

03

**Roll out** WEEKS 4-8

We stay until your team actually uses it. Adoption, not launch, is the hard part.

04

**Own** YOURS TO KEEP

Code handed over, running on your infrastructure. Refundable if it hasn't paid back in 60 days.

MAP, THEN BUILD

# WHERE IT STARTS.

00

## We map where it pays

A free working session, no slides. You leave with a written map — yours to keep, even if we never work together.

01

## We build it on your servers

In 14 days, one agent runs real work inside your own systems. The code is yours from day one — nothing held hostage.

INSIDE ONE AGENT · THE SCHEMA

# SIX NODES, ONE TASK.

**NODE 1** **Intake**  
A trigger arrives — an email, a form, a question.



**NODE 2** **Retrieve · RAG**  
Pulls the answer from **your** documents, not the public internet.



**NODE 3** **Reason**  
Decides what's being asked and what's needed to handle it.



**NODE 4** **Draft**  
Writes the reply, summary or report — grounded, not guessed.



**NODE 5** **Human check**  
A person owns the final call on anything that carries weight.



**NODE 6** **Deliver**  
Sends it, logs it, and is ready for the next one — 24/7.

PROVE IT, SPREAD IT, KEEP IT

# HOW IT STICKS.

02

## Prove

Before anyone relies on it, we check it against a measurable "done right." If a slip would reach a client, a human stays in the loop.

03

## Roll out

We stay through rollout until the team actually uses it — the part most vendors skip.

04

## Own

Code, hosting and running costs on the table up front. It runs on your infrastructure. Not paid back in 60 days? Full refund.

READ THIS PART WITH YOUR PARTNER

# THREE QUESTIONS BEFORE YOU START.

## **1** Which one process eats the most hours?

Pick the repetitive job your team does 3+ times a week. That's the pilot.

## **2** Can you measure "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 approve the map and judge the result. No owner, no rollout.

Three clear answers and you're ready for Phase 00. Still unsure? That's exactly what the free mapping session is for.

SAVE THIS SLIDE

# FIVE PHASES, ONE LOOK.

00	Map the process	Week 0 · free
01	Pilot on your servers	14 days
02	Prove vs "done right"	Weeks 2–4
03	Roll out to the team	Weeks 4–8
04	Own the code	Refundable · 60d

You keep the code, the data and the map. Timelines vary by process — these are typical, not promises.

WHEN YOU'VE READ IT TOGETHER

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

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

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

→ [hello@agencyforma.com](mailto:hello@agencyforma.com)

↗ SAVE & SEND THIS TO YOUR PARTNER