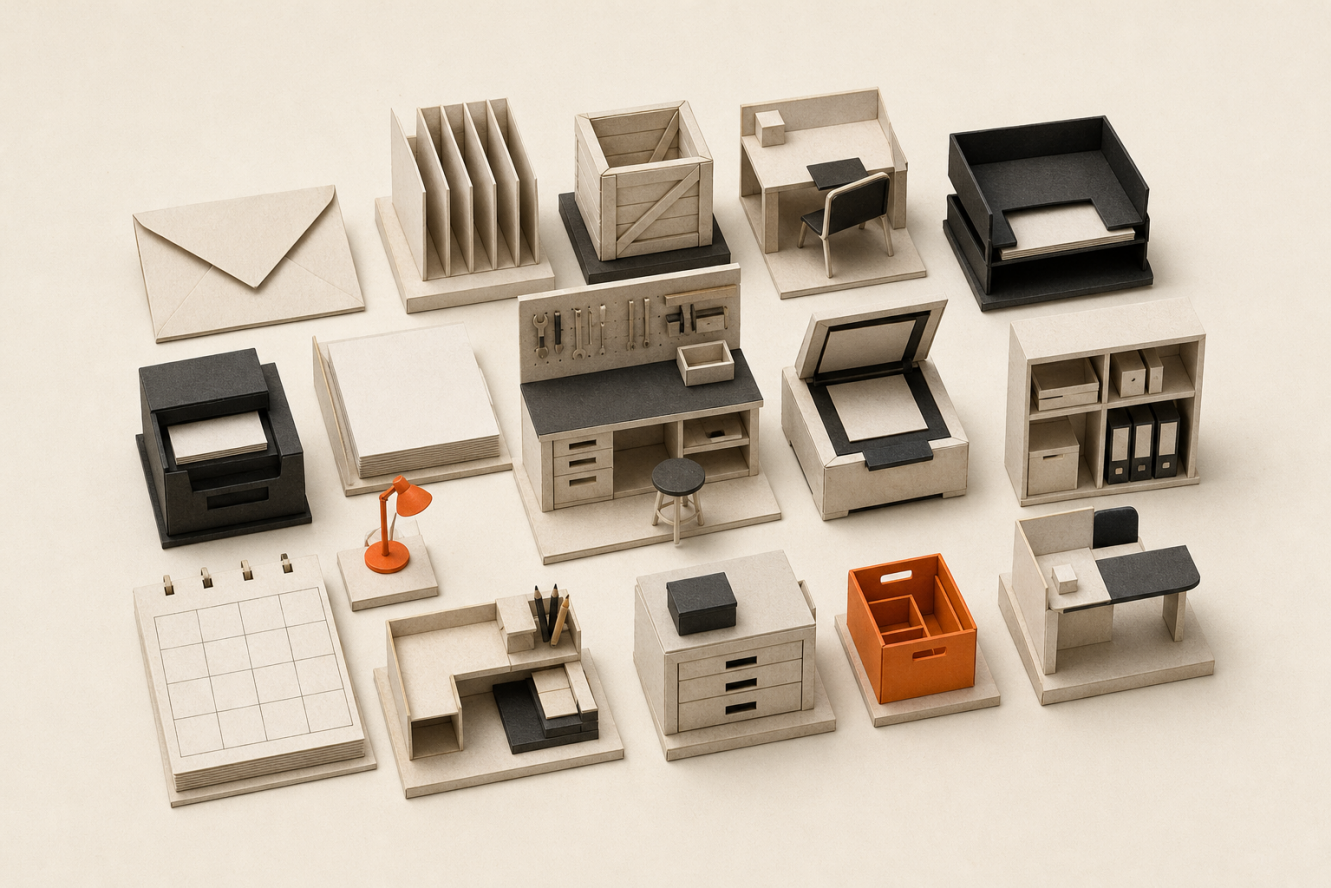
50 AI Automation Examples to Evaluate in 2027

Fifty workflow designs with inputs, review points and measures to test.



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Version 3.2 · Published 20 November 2026

Method: proposed applications mapped to vendor documentation. Patterns are proposed, not documented deployments.

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Executive summary

• These 50 proposed applications are planning examples, not tested deployments or forecasts of business results.

• [C] AI by Zapier documents text classification and extraction, which are building blocks for several examples in this guide [Z].

• [C] Microsoft AI Builder documents invoice extraction with field confidence scores, but a confidence score is not a payment approval [I].

• Each proposed application needs a named reviewer and a success measure before it can support a purchase decision.

• I would compare total handling time, including corrections, against the existing process before expanding a pilot.

Customer support examples 1-5



Start with work a support agent can review against a source record. Keep refunds and account changes outside the pilot's write permissions.

Source basis: [Z], [K], [H]. These are proposed designs. Product documentation supports the components, not the results.

1 Route a support email

Proposed pattern. **Prerequisites:** Queue rules and inbox access. **Trigger:** a new support email arrives. **Input:** the message and a written queue guide. **Output:** an AI-suggested topic and destination, with ambiguous messages left unassigned. **Human check:** a support lead reviews disputed routes. **Failure:** Wrong queue or an ambiguous message. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for correctly routed messages divided by reviewed messages, with handling time recorded. **Basis:** classification [Z].

2 Draft an answer from the help centre

Proposed pattern. **Prerequisites:** Approved articles and product context. **Trigger:** an agent opens a repeated product question. **Input:** the question and approved help articles. **Output:** a draft answer with the supporting article attached. **Human check:** the agent checks that the answer applies to this customer's product. **Failure:** Outdated article or wrong product advice. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for accepted drafts and factual corrections per reviewed answer. **Basis:** knowledge-based support [K].

3 Prepare a complaint handoff

Proposed pattern. **Prerequisites:** Escalation rules and conversation access. **Trigger:** a customer disputes an earlier response. **Input:** the conversation and escalation rules. **Output:** a factual summary for a person, with unresolved questions preserved. **Human check:** the receiving agent reads the original messages before making a promise. **Failure:** Omitted complaint detail or promise. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for missing material facts in reviewed handoffs. **Basis:** summarisation [Z] and escalation [H].

4 Translate an incoming enquiry

Proposed pattern. **Prerequisites:** Language support and a fluent reviewer. **Trigger:** a message arrives in a language the assigned agent does not read. **Input:** the original text and known product names. **Output:** a translated draft beside the original. **Human check:** a fluent reviewer checks consequential wording before a reply goes out. **Failure:** Changed meaning or technical term. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for meaning-changing corrections per reviewed translation. **Basis:** translation capabilities [M].

5 Group repeated support problems

Proposed pattern. **Prerequisites:** Ticket export and agreed topic labels. **Trigger:** a scheduled review of closed tickets. **Input:** approved, minimised ticket text. **Output:** proposed issue groups with example tickets, preserving unusual cases separately. **Human check:** a support manager checks that the labels match the records. **Failure:** Distinct issues incorrectly merged. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for consistency with independently reviewed labels. **Basis:** text classification [Z].

Sales administration examples 6-10

Use AI to organise what a prospect actually said. Do not let inferred intent become a CRM fact or an unapproved sales promise.

Source basis: [Z], [T], [A]. Connections to a CRM and its permissions must be checked for the selected system.

6 Turn an enquiry into a CRM draft

Proposed pattern. **Prerequisites:** CRM schema and write permissions. **Trigger:** a website enquiry is submitted. **Input:** the submitted text and approved CRM field definitions. **Output:** a proposed record with unknown fields left blank. **Human check:** a salesperson checks company identity and consent fields before saving. **Failure:** Wrong company or invented field value. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for corrected fields per reviewed record. **Basis:** structured extraction [Z].

7 Prepare a discovery-call brief

Proposed pattern. **Prerequisites:** Consented application and CRM access. **Trigger:** a qualified prospect books a call. **Input:** their supplied application and existing CRM notes. **Output:** a short brief that separates stated needs from unanswered questions. **Human check:** the salesperson checks it against the application. **Failure:** Unsupported need attributed to a prospect. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for unsupported statements and preparation time per brief. **Basis:** summarisation [Z].

8 Draft the meeting follow-up

Proposed pattern. **Prerequisites:** Authorised transcript and account match. **Trigger:** an authorised meeting transcript becomes available. **Input:** the transcript and the account record. **Output:** a draft recap with proposed actions and unresolved dates. **Human check:** the meeting owner confirms commitments before sending. **Failure:** Invented commitment or wrong deadline. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for incorrect commitments per reviewed draft. **Basis:** meeting recap [T] and draft writing [Z].

9 Check proposal inputs for omissions

Proposed pattern. **Prerequisites:** Required-scope checklist and draft access. **Trigger:** a proposal moves to review. **Input:** the draft and the team's required-scope checklist. **Output:** missing information flagged with its source section. **Human check:** the seller decides whether each omission needs action. **Failure:** Missing required scope left unflagged. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for missed required fields compared with manual review. **Basis:** extraction and comparison of supplied text [Z].

10 Suggest CRM updates from call notes

Proposed pattern. **Prerequisites:** CRM field map and approval gate. **Trigger:** a salesperson submits their notes. **Input:** those notes and the current deal record. **Output:** proposed field changes with before-and-after values. **Human check:** the owner approves each update before any write. **Failure:** Wrong record or duplicated update. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for approved changes versus incorrect changes, including duplicates. **Basis:** extraction [Z] and tool approval [A].

Finance administration examples 11-15

These examples prepare records for a qualified finance reviewer. They do not make tax decisions, change bank details or release money.

Source basis: [I], [M], [Z]. Validate extracted values against the original document before importing them into accounts.

11 Extract supplier invoice fields

Proposed pattern. **Prerequisites:** Supported invoices and supplier register. **Trigger:** an invoice reaches the approved intake folder. **Input:** the invoice file. **Output:** draft supplier, invoice date and amount fields with extraction confidence. **Human check:** accounts payable compares the fields with the image and supplier record. **Failure:** Wrong total, currency or supplier. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for exact field matches per reviewed invoice. **Basis:** invoice processing [I].

12 Prepare an expense receipt record

Proposed pattern. **Prerequisites:** Supported receipts and expense policy. **Trigger:** an employee submits a receipt. **Input:** the receipt and the employee's stated business purpose. **Output:** extracted receipt fields in a review queue. **Human check:** the finance reviewer confirms the amount and policy treatment. **Failure:** Wrong amount or policy treatment. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for field errors and review time per receipt. **Basis:** receipt processing [M].

13 Draft an overdue-invoice reminder

Proposed pattern. **Prerequisites:** Current ledger and reminder rules. **Trigger:** a confirmed ledger entry reaches the reminder stage. **Input:** verified payment status and account correspondence. **Output:** a draft message using the approved balance. **Human check:** accounts receivable checks recent payments and disputes before sending. **Failure:** Stale balance or unresolved dispute. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for reminders with an incorrect balance or status. **Basis:** text generation [Z].

14 Explain a reconciliation exception

Proposed pattern. **Prerequisites:** Reconciliation rules and record access. **Trigger:** existing accounting rules flag an unmatched item. **Input:** the flagged entries and relevant document text. **Output:** a plain-language explanation of possible matches, without changing the ledger. **Human check:** a bookkeeper decides the match. **Failure:** Unsupported match suggested as certain. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for supported suggestions versus unsupported suggestions. **Basis:** summarisation of supplied records [Z].

15 Draft a management commentary

Proposed pattern. **Prerequisites:** Approved figures and reporting definitions. **Trigger:** a finance lead approves the period's figures. **Input:** validated totals and recorded explanations. **Output:** a draft commentary that links each statement to a supplied figure. **Human check:** the finance lead verifies every financial statement. **Failure:** Unsupported explanation of a variance. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for unsupported explanations per reviewed report. **Basis:** controlled text generation [Z].

Order and ecommerce examples 16-20

A store event can start a workflow without AI. Add AI only where interpreting text or drafting a response needs more than a fixed rule.

Source basis: [S], [Z], [K]. Shopify triggers do not by themselves supply every integration in these proposed workflows.

16 Interpret an order note

Proposed pattern. **Prerequisites:** Order access and fulfilment categories. **Trigger:** a new order includes a customer note. **Input:** the note and allowed fulfilment categories. **Output:** a suggested category with the original wording retained. **Human check:** fulfilment staff approve anything that changes packing or delivery. **Failure:** Packing instruction missed or altered. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for missed instructions per reviewed order. **Basis:** store events [S] and classification [Z].

17 Draft a delivery-status reply

Proposed pattern. **Prerequisites:** Current order status and support guidance. **Trigger:** a customer asks where an order is. **Input:** authorised order status and approved delivery guidance. **Output:** a draft using the supplied status, with unknown arrival times left unknown. **Human check:** support reviews exceptions. **Failure:** Invented arrival date or wrong order. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for replies containing unsupported delivery promises. **Basis:** knowledge-based support [K].

18 Summarise return reasons

Proposed pattern. **Prerequisites:** Return export and product identifiers. **Trigger:** the returns team exports approved return notes. **Input:** those notes and product identifiers. **Output:** proposed reason categories linked to source returns. **Human check:** the team checks ambiguous reasons and faulty-product claims. **Failure:** Faulty-product claim hidden in a category. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for label agreement on reviewed returns. **Basis:** text classification [Z].

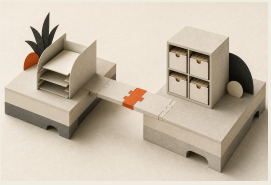
19 Draft a product description from specifications

Proposed pattern. **Prerequisites:** Verified specifications and claims rules. **Trigger:** an approved product record is ready for copy. **Input:** verified specifications and the brand's claims rules. **Output:** a draft description restricted to supplied facts. **Human check:** the merchant checks material, dimensions and regulated claims. **Failure:** Unsupported product claim. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for unsupported product statements per draft. **Basis:** text generation [Z].

20 Summarise stock-exception notes

Proposed pattern. **Prerequisites:** Inventory access and reconciled counts. **Trigger:** the operations team flags a stock exception. **Input:** verified inventory records and warehouse comments. **Output:** a proposed explanation for the buyer, with uncertain causes marked. **Human check:** the stock owner verifies counts before action. **Failure:** Unverified cause presented as fact. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for unsupported causes in reviewed summaries. **Basis:** supplied-text summarisation [Z].

Document handling examples 21-25



Keep the original file available beside each extraction. A readable field value can still be wrong, especially when documents use different layouts.

Source basis: [F], [M], [Z]. These applications require document access and field-level checks in the buyer's environment.

21 Extract purchase-order details

Proposed pattern. **Prerequisites:** Supported files and required field list. **Trigger:** an approved purchase order enters the intake folder. **Input:** its document and a defined field list. **Output:** proposed order details with source references. **Human check:** a purchasing administrator checks quantities and commercial terms. **Failure:** Wrong quantity or commercial term. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for exact matches for required fields. **Basis:** custom document processing [F].

22 Prepare a contract obligations list

Proposed pattern. **Prerequisites:** Signed contract and qualified reviewer. **Trigger:** an executed contract is filed. **Input:** the signed document and the fields the contract owner needs. **Output:** candidate obligations with quoted source passages. **Human check:** the contract owner or qualified adviser verifies interpretation. **Failure:** Missed obligation or false interpretation. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for omissions against a manual review. **Basis:** document extraction [F].

23 Suggest document filing labels

Proposed pattern. **Prerequisites:** Folder taxonomy and restricted file access. **Trigger:** an authorised file arrives in a shared inbox. **Input:** extracted text and the approved folder taxonomy. **Output:** suggested file type and destination. **Human check:** a records owner approves uncertain or sensitive items. **Failure:** Sensitive file sent to the wrong folder. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for incorrect destinations in reviewed files. **Basis:** text extraction and classification [M].

24 Find missing intake information

Proposed pattern. **Prerequisites:** Required-field checklist and intake access. **Trigger:** a client submits an intake pack. **Input:** the submitted documents and required-field checklist. **Output:** a list of absent or unclear fields, without guessing values. **Human check:** the case owner confirms the omissions before contacting the client. **Failure:** Required omission missed. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for false missing-field alerts and missed omissions. **Basis:** extraction [F].

25 Summarise a revised procedure

Proposed pattern. **Prerequisites:** Old and revised approved documents. **Trigger:** an authorised procedure revision reaches review. **Input:** the old text and proposed revision. **Output:** a draft change summary that links to affected passages. **Human check:** the procedure owner verifies each change. **Failure:** Material procedure change omitted. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for missed material changes in reviewed summaries. **Basis:** summarisation of supplied text [Z].

Marketing production examples 26-30

Give the model approved source material and a clear output format. Leave publishing permissions with the editor until the pilot's evidence supports a change.

Source basis: [Z], [M]. These examples do not assume permission to use customer comments or private conversations in public content.

26 Draft a newsletter from an approved article

Proposed pattern. **Prerequisites:** Approved article and publication permission. **Trigger:** an editor approves a source article. **Input:** the article and newsletter style rules. **Output:** a draft email that links back to the article. **Human check:** the editor checks claims and the promised benefit. **Failure:** Source claim changed in the email. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for factual corrections and editing time per draft. **Basis:** text generation [Z].

27 Turn a transcript into a content outline

Proposed pattern. **Prerequisites:** Transcript permission and editorial brief. **Trigger:** an authorised transcript is ready. **Input:** its text and the intended reader's question. **Output:** a proposed article outline with source passages. **Human check:** the editor checks meaning and publication permission. **Failure:** Meaning lost or permission missing. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for unsupported claims in the outline. **Basis:** summarisation [Z].

28 Sort customer feedback by topic

Proposed pattern. **Prerequisites:** Minimised feedback and topic guide. **Trigger:** approved feedback is collected for review. **Input:** minimised comments and a topic guide. **Output:** topic labels with representative source comments. **Human check:** a researcher checks the labels without treating this sample as the whole market. **Failure:** Biased labels or unrepresentative sample. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for agreement with independent human coding. **Basis:** classification [M].

29 Check a draft against approved claims

Proposed pattern. **Prerequisites:** Approved claim register and source access. **Trigger:** copy reaches fact review. **Input:** the draft and an approved claim register. **Output:** statements that lack a matching source. **Human check:** the editor verifies flagged and unflagged claims before publication. **Failure:** Unsupported claim missed. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for unsupported claims missed by the check. **Basis:** extraction from supplied text [Z].

30 Prepare localisation for review

Proposed pattern. **Prerequisites:** Approved glossary and fluent editor. **Trigger:** a campaign needs another language. **Input:** approved copy and a product glossary. **Output:** a translation draft with names and technical terms preserved. **Human check:** a native-language editor reviews meaning and local suitability. **Failure:** Meaning or local suitability changed. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for meaning-changing edits per reviewed asset. **Basis:** translation [M].

Internal administration examples 31-35

These examples help staff find or prepare information. They do not score job candidates or decide pay, promotion, discipline or employment.

Source basis: [Z], [T], [K], [H]. Match access permissions to the person asking, including when source material enters a model.

31 Draft an onboarding checklist

Proposed pattern. **Prerequisites:** Role guide and authorised manager. **Trigger:** an authorised manager confirms a new starter's role. **Input:** the approved role guide and onboarding procedure. **Output:** a proposed checklist that cites those documents. **Human check:** the manager confirms tasks and access requests. **Failure:** Required task or access check missed. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for missing required tasks per reviewed checklist. **Basis:** supplied-text generation [Z].

32 Answer an internal policy question

Proposed pattern. **Prerequisites:** Current policies and permission-filtered search. **Trigger:** an employee asks about an approved policy. **Input:** the question and current documents they may access. **Output:** a sourced draft answer or a handoff. **Human check:** the policy owner reviews ambiguous cases. **Failure:** Restricted or outdated policy disclosed. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for unsupported policy answers. **Basis:** knowledge-based answers [K] and escalation [H].

33 Summarise a team meeting

Proposed pattern. **Prerequisites:** Authorised recap and confirmed attendees. **Trigger:** an authorised meeting recap becomes available. **Input:** the transcript and attendee-confirmed decisions. **Output:** proposed action notes with owners left blank when unstated. **Human check:** the chair confirms owners and deadlines. **Failure:** Wrong owner or invented deadline. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for incorrect assignments per reviewed recap. **Basis:** meeting recap [T].

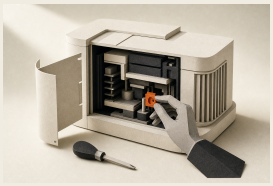
34 Classify internal service requests

Proposed pattern. **Prerequisites:** Service categories and private queue. **Trigger:** a staff request reaches an internal queue. **Input:** its text and allowed service categories. **Output:** a proposed category without sensitive content copied into public channels. **Human check:** the queue owner checks exceptions. **Failure:** Sensitive data exposed or wrong queue. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for wrong-queue referrals and correction time. **Basis:** text classification [M].

35 Draft a training quiz from a procedure

Proposed pattern. **Prerequisites:** Approved procedure and training owner. **Trigger:** a procedure owner approves training material. **Input:** the approved procedure. **Output:** proposed questions with answer references to the source. **Human check:** the trainer verifies that each answer is supported and unambiguous. **Failure:** Ambiguous question or unsupported answer. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for invalid questions per reviewed set. **Basis:** text generation [Z].

Field service and project examples 36-40



Give site teams a draft they can correct against the job record. Keep safety decisions and changes to agreed scope with the responsible person.

Source basis: [Z], [F]. The proposed workflows depend on consistent job identifiers and readable source records.

36 Turn technician notes into a job report

Proposed pattern. **Prerequisites:** Job reference and technician verification. **Trigger:** a technician submits completed-job notes. **Input:** the notes and job reference. **Output:** a draft report that preserves measurements exactly as supplied. **Human check:** the technician verifies work done and unresolved defects. **Failure:** Measurement changed or defect omitted. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for unsupported statements in reviewed reports. **Basis:** text generation [Z].

37 Prepare a quote request summary

Proposed pattern. **Prerequisites:** Scope documents and estimator review. **Trigger:** a customer supplies a written scope request. **Input:** the message and any approved specification documents. **Output:** a summary of requested work with missing dimensions flagged. **Human check:** the estimator confirms requirements before pricing. **Failure:** Missing requirement or dimension overlooked. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for missed requirements compared with a manual review. **Basis:** extraction [F], summarisation [Z].

38 Summarise project handover notes

Proposed pattern. **Prerequisites:** Current project records and owner handover. **Trigger:** a project changes owner. **Input:** current status notes and approved decisions. **Output:** a proposed handover with unresolved actions attached to source records. **Human check:** outgoing and incoming owners verify open commitments. **Failure:** Open commitment omitted. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for omitted open actions per reviewed handover. **Basis:** summarisation [Z].

39 Route a maintenance request

Proposed pattern. **Prerequisites:** Routing guide and safety escalation rules. **Trigger:** a written maintenance request arrives. **Input:** the request and an approved routing guide. **Output:** a suggested trade and an escalation flag for ambiguous cases. **Human check:** a coordinator sets priority, especially for safety-related reports. **Failure:** Urgent safety issue missed. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for wrong routes and missed escalations. **Basis:** classification [Z].

40 Prepare a variation request

Proposed pattern. **Prerequisites:** Signed scope and change-control process. **Trigger:** someone requests a change to agreed work. **Input:** the request and the signed scope. **Output:** a draft description of the difference, with no invented price. **Human check:** the project owner confirms scope and obtains approval. **Failure:** Scope difference missed or price invented. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for scope differences missed in reviewed drafts. **Basis:** supplied-text extraction [Z].

IT service examples 41-45

Use a review queue before giving an AI workflow permission to change systems. Keep credentials out of model inputs and validate suggested commands separately.

Source basis: [Z], [K], [H], [A]. A tool-approval feature is one control, not proof of a secure deployment.

41 Categorise a help-desk ticket

Proposed pattern. **Prerequisites:** Ticket categories and escalation rules. **Trigger:** a new IT ticket arrives. **Input:** a minimised problem description and approved categories. **Output:** a suggested category with uncertain cases marked for triage. **Human check:** the service desk confirms urgency. **Failure:** Urgent ticket given a routine category. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for misclassified tickets and missed urgent cases. **Basis:** classification [Z].

42 Draft a troubleshooting response

Proposed pattern. **Prerequisites:** Current runbook and version details. **Trigger:** an agent opens a known issue. **Input:** the ticket and current approved support instructions. **Output:** a proposed response citing the relevant instructions. **Human check:** the agent checks system version and access requirements. **Failure:** Unsafe or inapplicable instruction. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for unsupported or inapplicable steps in reviewed responses. **Basis:** knowledge-based support [K].

43 Summarise a sanitised incident log

Proposed pattern. **Prerequisites:** Sanitised logs and trusted timestamps. **Trigger:** an incident lead requests a summary. **Input:** sanitised log excerpts and verified timestamps. **Output:** a draft chronology that separates observed events from possible causes. **Human check:** the incident lead validates the sequence. **Failure:** Wrong event order or invented cause. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for missing events and unsupported causal claims. **Basis:** summarisation [Z].

44 Prepare an access-request review

Proposed pattern. **Prerequisites:** Role-access guide and administrator review. **Trigger:** a manager submits an access request. **Input:** the approved form and role-access guide. **Output:** a summary of requested permissions and missing approvals. **Human check:** an authorised administrator decides and applies access. **Failure:** Missing approval overlooked. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for missing approvals overlooked by the draft. **Basis:** extraction [Z] and approval routing [A].

45 Draft a knowledge-base update

Proposed pattern. **Prerequisites:** Verified resolution and article access. **Trigger:** a resolved incident is nominated for documentation. **Input:** the verified resolution and existing article. **Output:** a proposed amendment with changed passages identified. **Human check:** the technical owner validates instructions before publishing. **Failure:** Incorrect technical instruction. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for incorrect instructions in reviewed changes. **Basis:** text generation [Z].

Owner and management examples 46-50

Use these drafts to prepare a decision, with the evidence beside the recommendation. Keep forecasts separate from facts already recorded in the business.

Source basis: [Z], [F]. None of these designs establishes a financial return without a pilot and a manual baseline.

46 Prepare a weekly operations digest

Proposed pattern. **Prerequisites:** Approved updates and reporting definitions. **Trigger:** team leads approve their weekly updates. **Input:** those updates and verified operational figures. **Output:** a digest with source links and unresolved issues. **Human check:** the operations owner checks material omissions. **Failure:** Reported issue omitted or unsupported claim. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for missing reported issues and unsupported claims. **Basis:** summarisation [Z].

47 Compare supplier proposals

Proposed pattern. **Prerequisites:** Comparable proposals and comparison fields. **Trigger:** comparable supplier proposals arrive. **Input:** the documents and a buyer-defined comparison table. **Output:** extracted terms with absent terms labelled unknown. **Human check:** the buyer checks exclusions and commercial commitments. **Failure:** Exclusion missed or currency confused. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for incorrect comparison cells per reviewed proposal. **Basis:** document extraction [F].

48 Draft a client progress update

Proposed pattern. **Prerequisites:** Verified work records and agreed scope. **Trigger:** a delivery milestone is reviewed. **Input:** verified work records and the agreed scope. **Output:** a draft update that separates completed work from pending work. **Human check:** the account owner confirms status before sending. **Failure:** Unfinished work described as complete. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for inaccurate completion claims per draft. **Basis:** text generation [Z].

49 Group suggested process improvements

Proposed pattern. **Prerequisites:** Minimised suggestions and review criteria. **Trigger:** staff submit ideas for review. **Input:** their written suggestions, with personal details removed where unnecessary. **Output:** proposed groups with distinct ideas retained. **Human check:** the operations lead checks that minority concerns remain visible. **Failure:** Minority concern lost in grouping. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for overlooked distinct suggestions in a reviewed sample. **Basis:** classification [Z].

50 Prepare an automation pilot brief

Proposed pattern. **Prerequisites:** Process records and measured baseline. **Trigger:** an owner selects a process to examine. **Input:** the documented process and actual handling records. **Output:** a draft scope with missing evidence explicitly listed. **Human check:** the process owner approves the objective and limits. **Failure:** Scope limit or evidence requirement omitted. Stop and send to the reviewer. **Success criterion:** Meet the owner-agreed pilot threshold for omissions against the agreed brief requirements. **Basis:** supplied-text generation [Z].

Choose a pilot you can measure

Decision	Evidence to record	Release condition
What is in scope?	Named process, input source and permitted output	Owner approves the boundary
What counts as correct?	A field list, source-backed answer or routing guide	Reviewers use the same criteria
What does it cost?	Setup, software, review and correction time	Owner accepts total measured cost
What happens on failure?	Missing-input, retry and handoff behaviour	Manual route remains usable
What may it change?	Named systems and allowed write actions	Each write has an approval rule
When does it stop?	Error types, spend limit and accountable owner	Stop conditions agreed before launch

Author's proposed evaluation framework, informed by capability and approval documentation [Z], [I], [A]. It is not a vendor benchmark.

I would choose a repeated task with accessible source records and a reviewer who already knows the work. A draft support reply or an invoice intake record gives that reviewer something concrete to check.

Record the manual process before the pilot starts. Include exceptions and correction time so an easy sample does not hide the work that causes delays.

A model's confidence statement cannot replace a reviewer-approved acceptance test. Agree the test before looking at the pilot results.

Compare like-for-like work

Compare total handling minutes per completed case across the same task types. Count review, retries and rework, and keep unusual cases visible instead of removing them after results arrive.

Decide what to do with saved capacity

Time released does not automatically reduce payroll or create revenue. Record whether staff used it for other work, reduced overtime or completed additional paid work before assigning a financial benefit.

Choose a workflow to test

Pilot question	Your answer
Example number and process name	
Owner and people doing the work	
Input sample and permission to use it	
Monthly volume and current handling time	
Proposed output and reviewer	
What counts as an error?	
What result would justify continuing?	
When will you stop or return to manual work?	

Source: The AI Architects editorial worksheet. Complete with your own measurements and written quotes. No market averages are implied.

Choose an example because the work exists in your business. Use representative inputs, including the awkward cases that usually require a person.

Measure review time and corrections as part of the pilot. A faster first draft does not establish that the complete job takes less time.

Test the complete job

Use real inputs — **Run a small pilot** — **Review outcomes** — **Keep or revise**

Proposed pilot sequence. Use authorised data. Continue only when the process meets the acceptance criteria you set.

Measure	Record before and during the pilot
Handling time	Minutes spent on the job, including review and correction.
Accuracy	Jobs meeting the agreed standard, with the total jobs checked.
Exceptions	Failures, missing inputs and manual interventions.
Operating cost	Actual usage, support work and any additional licences.
Ownership	Who acts when the automation stops or produces an uncertain result.

Source: The AI Architects pilot reference. Measures are proposed, not observed outcomes.

Keep the manual route available during the test. If the output needs so much checking that the job takes longer, revise the design before expanding it.

Methodology and limits

I selected 50 distinct administrative applications and mapped them to published vendor capabilities. The count describes this guide's contents, not a market estimate.

[C] identifies an exact primary-source observation. [E] identifies a calculation with explicit assumptions and uncertainty. Editorial advice and proposed patterns are labelled in plain language and are not measured outcomes.

[C] Source documents were checked on 19 November 2026. The 2027 label identifies the planning edition, not evidence collected during 2027.

Every example is a proposed application inferred from documented capabilities. No example is presented as a tested client deployment, and none carries a claimed saving or success rate.

Sources were included when they were official vendor help or documentation pages explaining the component used. Promotional case-study figures, third-party rankings and unsourced ROI estimates were excluded.

A capability document does not prove integration access, accuracy or commercial suitability in a particular business. Product plans and permissions must be checked before purchase, and proposed workflows need testing with representative records.

The measures beside each example are suggested pilot measures, not published performance targets. Acceptance thresholds belong to the business owner and must reflect the consequence of an error.

Some workflows combine AI with ordinary rules. Store triggers, arithmetic and approval routing should use deterministic controls where their job is already defined.

The primary sources support the components cited. They do not endorse these designs, and they do not establish that the examples will work unchanged in 2027.

Published 20 November 2026. Primary sources rechecked 20 November 2026. Source dates describe observations, not a 2027 research period. No announced future prices are included.

How to cite this guide

Tom Crawshaw, The AI Architects. 50 AI Automation Examples to Evaluate in 2027. Version 3.2, published 20 November 2026. Cite the example number and retain its label when describing a proposed application.

What a reader can reproduce

Use the cited vendor documentation to inspect the underlying capability, then use the example's inputs and review rule to design a pilot. Publish actual outcomes only after recording the sample, errors, costs and measurement period.

Sources and citation details

[Z] Zapier: Use AI by Zapier to analyze and return data

[C] Documents writing, summarisation, classification and extraction from supplied inputs. Does not establish reliability or savings for the proposed applications. AI by Zapier cannot browse a supplied URL.

https://help.zapier.com/hc/en-us/articles/8496342944013-Use-AI-by-Zapier-to-analyze-and-return-data

Accessed 2026-11-19

[M] Microsoft: Use AI Builder in Power Automate

[C] Documents text and document capabilities available in flows. Proposed integrations and business outcomes remain untested.

https://learn.microsoft.com/en-us/ai-builder/use-in-flow-overview

Accessed 2026-11-19

[I] Microsoft: Use invoice processing in Power Automate

[C] Documents invoice extraction outputs and confidence values. Does not authorise payment or verify supplier identity.

https://learn.microsoft.com/en-us/ai-builder/flow-invoice-processing

Accessed 2026-11-19

[F] Microsoft: Document processing FAQ

[C] Documents custom document extraction. The examples need validation against the reader's actual files.

https://learn.microsoft.com/ai-builder/form-processing-faq

Accessed 2026-11-19

[S] Shopify: Understanding triggers in Shopify Flow

[C] Documents event triggers and available data. Flow alone is rule automation. Examples that use it also need an AI step and suitable integrations.

https://help.shopify.com/en/manual/shopify-flow/getting-started/understanding-triggers

Accessed 2026-11-19

Sources and citation details continued

[K] Intercom: Fin AI Agent explained

[C] Documents knowledge-based customer support. No vendor resolution-rate claim is used in this report.

https://www.intercom.com/help/en/articles/7120684-fin-ai-agent-explained

Accessed 2026-11-19

[H] Intercom: Manage Fin escalation guidance and rules

[C] Documents escalation configuration. The proposed business rules still require testing.

https://www.intercom.com/help/en/articles/12396892-manage-fin-ai-agent-s-escalation-guidance-and-rules

Accessed 2026-11-19

[T] Microsoft: Recap in Microsoft Teams

[C] Documents meeting recap and AI notes/tasks. Availability depends on the user's licence and meeting setup.

https://support.microsoft.com/en-us/teams/meetings/recap-in-microsoft-teams

Accessed 2026-11-19

[A] n8n documentation: Human in the loop for AI tool calls

[C] Documents human approval for tool calls. It does not prove that a complete business workflow is safe or accurate.

https://github.com/n8n-io/n8n-docs/blob/main/docs/build/integrate-ai/ai-examples/human-in-the-loop-for-tools.md

Accessed 2026-11-19

Prepare a scoped automation plan

Bring the process you want to improve and a representative input. Record what a completed job looks like and who approves it.

Use the questions below to turn the report into a brief that a supplier can price. Keep assumptions visible until a quote or a pilot replaces them.

Describe the work

Name the trigger, source records and required output. Include the exceptions that currently need manual attention.

Set the purchase boundary

List the systems and actions in scope. Identify who owns the accounts and who reviews the output.

Online report and updates: theaiarchitects.com/ai-automation-examples

Continue with the related reports

AI Automation for Small Business: The 2027 Buyer's Guide

AI Automation Implementation Costs for 2027 Planning

Get a scoped automation plan → theaiarchitects.com/ai-consulting