

The H.U.M.A.N. AI Method:

A 17-Step Workflow for Sustainable Automation

PHASE 1

Hear (Discovery & Buy-in)

01

Identify Stakeholders Early

Interview budget-controlling managers to define goals and constraints, securing sponsorship in writing to prevent project cancellation later.

02

Identify Subject Matter Experts (SMEs)

Interview or shadow the people doing the daily work to capture real steps and exceptions, turning potential fear of AI into project buy-in.

03

Document Current-State Process

Walk the entire workflow start to finish using the 6-field standard (Action, What, Where, Why, How, Next) to ensure no step is overlooked.

PHASE 2

Understand (Analysis)

04

Classify Every Step

Tag each step as Keep As-Is, Automate, Retire, or Redesign; automating waste only serves to make the waste occur faster.

05

Validate with SMEs & Stakeholders

Review classifications out loud to catch compliance or essential requirements before the design phase begins.

✓ Gate: Formal Sign-off

Nothing moves to the Map phase until stakeholders and SMEs have signed off on the same classification list.

PHASE 3

Map (Design)

06

Design Future-State Workflow

Use the 6-field standard to explicitly show the difference between system-triggered actions and human-triggered steps.

07

Identify Tools & Integration Points

Name the specific tech stack (e.g., GHL, N8N, Claude API) at every handoff point, as these crossing points are typically where automations break.

PHASE 4

Activate (Build, Document, Train, Test)

08

Build the Automation

Construct the solution in a sandbox or staging environment first — never build directly against production data.

09

Prepare SOPs

Document what the system does and what the human does; without written SOPs, the process fails if a key person leaves.

10

Build Training Materials

Create recordings, quick-reference guides, and FAQs based on the real questions asked during the Hear and Understand phases.

11

Test the System

Run real records and contacts through the system, specifically testing edge cases and failure paths.

12

Deliver Training

Conduct a live walkthrough with the team on the tested system rather than just handing over a document.

✓ Gate: SME Confirmation

No go-live is permitted until SMEs confirm the tested system perfectly matches the documented future-state process.

PHASE 5

Nurture (Maintain & Evolve)

13

Monitored Rollout

Closely watch the first live runs; never assume passing sandbox tests translates to perfect real-world performance.

14

Maintain Integrity

Perform scheduled spot-checks on a set cadence to compare actual output against expected output.

15

Watch for Tool/API Drift

Assign a named owner to check for vendor changes (GHL, N8N, Zapier, etc.) on a schedule rather than waiting for a failure.

16

Prevent Staleness

Conduct quarterly reviews to ensure the automation still matches the current way the business runs.

17

Feed Friction Back Into the Loop

Treat the system as a continuous project by feeding friction back into Step 4 for re-classification.

The Cost of Skipping

Skip Hear

The automation won't match reality, leading to team resentment and rejection of the tool.

Skip Understand

You end up automating inefficient "waste" processes instead of removing or improving them.

Skip Activate (SOPs & Training)

The system works temporarily but becomes a liability the moment the one person who understands it leaves.

Skip Nurture

The automation breaks silently when a vendor changes an API, costing the business money before the error is noticed.