



**ASCENDEA**

AI / BUSINESS GROWTH / LEARNING WORKBOOK

# Launch a Responsible AI Services Practice — Nine-Lesson Learning Workbook

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A nine-lesson, evidence-led workbook for UK SME founders and responsible AI service providers to define a focused AI services offer, test buyer demand, price and deliver bounded pilots, run compliant outreach, and make a reasoned next-step decision.



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[ascendea.ai](https://ascendea.ai)

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Author: Rob Arnold · Ascendea · Edition v1.0 · October 2026

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## For UK SME founders and responsible AI service providers

Author: Rob Arnold · Ascendea: <https://ascendea.ai/>

Edition: v1.0 · October 2026

This workbook helps you make, test and record practical decisions for a focused AI services practice. It follows nine lessons: choose a model, focus on a buyer and problem, define an offer, price it honestly, build a compliant pipeline, deliver a bounded pilot, learn from delivery, and decide what to do next.

It does **not** promise a first client, a particular income, a meeting count or a fixed launch date. The examples, calculations, prices and timeboxes are **illustrative planning assumptions**, not market benchmarks, professional advice or results that Ascendea has achieved for clients. All founder scenarios are **fictional teaching examples**.

# How to use this workbook

Read the lessons in order and complete the action block before moving on. Keep one decision log beside the workbook. For every important statement, mark it as **known**, **assumed** or **needs testing**. Change the plan when new evidence changes your view; do not change it merely because a new tool or trend appears.

A useful starting rule is: sell a problem you can understand and a result you can deliver safely. An AI services practice is a services business first. A client is not buying your tool subscriptions; they are buying a better process, a controlled experiment or a clearer decision.

## Decision log

| Decision            | Known evidence | Assumption to test | Owner | Review date |
|---------------------|----------------|--------------------|-------|-------------|
| My starting model   |                |                    |       |             |
| Buyer and process   |                |                    |       |             |
| Initial offer       |                |                    |       |             |
| Delivery safeguards |                |                    |       |             |

# Lesson 1 — Start with a realistic operating decision

The original attraction of an “AI agency” is that it can sound like a quick route to growth. The more useful starting point is smaller and more demanding: decide what work you can credibly do for a defined buyer, what must stay under human control, and how you will learn whether the problem is worth solving.

Do not begin by trying to open every category at once. A broad LinkedIn headline, a collection of unfinished demos and several generic proposals can hide the fact that no one knows what you actually deliver. Choose one initial service direction for a deliberate test period. You can expand when evidence, capacity and competence justify it.

Reserve time for learning, sales and delivery separately. The exact number of hours is your planning choice; it must be realistic alongside your existing obligations. A calendar block is not a revenue forecast.

## Your orientation decision

Write one plain-English sentence:

During the next 90 days, I will test whether I can help **[buyer]** with **[one process/problem]** through **[bounded capability]**, while keeping **[safeguard or explicit boundary]** in place.

**Example — fictional.** “During the next 90 days, I will test whether I can help small facilities-management firms triage maintenance enquiries through AI-assisted classification, while a person reviews urgent or unclear requests.”

## Action: capacity and boundaries

- ☐ I have named one buyer group rather than “all businesses”.
- ☐ I have named one process I can discuss intelligently.
- ☐ I have blocked realistic time for research, conversations and any delivery.
- ☐ I have listed work I will not sell until I have the right capability or partner.
- ☐ I have recorded the date when I will review this decision.

## Lesson 2 — Choose one service model and a minimum viable stack

“AI agency” can mean several materially different businesses. Your model determines the skills you need, the conversations you have and the risks you accept.

### Four practical starting models

**Workflow automation.** Improve a repeatable process such as enquiry routing, CRM administration, meeting-note preparation or internal reporting. AI may handle a narrow step while ordinary rules handle the rest. Start where inputs, a process owner and a manual fallback are clear.

**AI-assisted marketing services.** Use AI to support research, drafting, content production or reporting. The service still requires editorial judgement, fact checking, truthful claims and a clear business purpose. Producing more content is not, by itself, a client outcome.

**AI applications and assistants.** Build a knowledge assistant, customer-support aid or other software workflow. This requires appropriate engineering, integration, testing, security and permissions capability. Begin with a limited, permitted task; do not connect an untested assistant to live systems and call that a pilot.

**AI assessment and advisory.** Review a process, identify candidate interventions and provide a prioritised recommendation. This sells judgement rather than implementation. It requires sufficient domain understanding to recommend a non-AI change when that is the better answer.

There is no universal “best” model or reliable income ranking. Match the model to experience, buyer access, risk tolerance and the work you can actually support.

### Fit check

Score each possible model from 1 to 5. A high score is a reason to investigate, not proof that you are ready to sell.

| Model                    | Relevant experience | Buyer access | Delivery confidence | Risk I can manage | Evidence or gap |
|--------------------------|---------------------|--------------|---------------------|-------------------|-----------------|
| Workflow automation      |                     |              |                     |                   |                 |
| AI-assisted marketing    |                     |              |                     |                   |                 |
| AI application/assistant |                     |              |                     |                   |                 |

| Model                   | Relevant experience | Buyer access | Delivery confidence | Risk I can manage | Evidence or gap |
|-------------------------|---------------------|--------------|---------------------|-------------------|-----------------|
| Assessment/<br>advisory |                     |              |                     |                   |                 |

Choose one model and record the skill gaps. A marketer may need a security partner. A developer may need a domain specialist to define safe behaviour. Neither gap is solved by changing the label of the service.

## Build the smallest viable stack

Choose capabilities, not fashionable brands. You may need a business-grade AI service, an integration tool, a CRM, project tracking, invoicing and secure documentation. Some functions may be covered by one system. Before you commit, check provider documentation for access controls, data terms, API availability, usage limits, billing and account ownership.

Keep credentials, API keys, passwords and client secrets out of prompts, chat transcripts and shared workbooks. Use separate client environments where appropriate, least-privilege access and a record of who owns each account.

For new OpenAI integrations, do not follow an old Assistants API tutorial: OpenAI states that its Assistants API was sunset on 26 August 2026 and directs new integrations to the Responses API.<sup>1</sup> This is a product-specific example, not an endorsement or a requirement to use OpenAI.

## Action: model, stack and safety boundary

- ☐ My initial model is: \_\_\_\_.
- ☐ My buyer and process owner are: \_\_\_\_.
- ☐ I can point to relevant experience, evidence or a delivery partner.
- ☐ My first use case has a manual fallback.
- ☐ I have listed the data, permissions and skills I still need before selling it.
- ☐ I have chosen only tools required for the first controlled offer.

## Lesson 3 — Find a wedge: a buyer, a problem and a boundary

A niche is a useful focus, not a permanent prison. It helps you recognise a buyer's context, create relevant examples and repeat a delivery process. It does not prove that the buyer cares enough to pay.

Use this positioning sentence as a drafting tool:

I help [specific buyer] improve [specific process or outcome] using [capability I can deliver], with [clear safeguard or boundary].

**Fictional example.** “I help small facilities-management firms route incoming maintenance enquiries to the right team using AI-assisted classification, with human review for urgent or unclear requests.”

The sentence needs a buyer, a process, a capability and a boundary. It should not claim a percentage improvement before you have a credible baseline.

## Pressure-test the wedge

**Buyer test.** Can you name real organisations that fit? Identify the process user, budget owner and change approver. These may be different people.

**Consequence test.** What happens when the process fails? Record observable effects such as delayed replies, duplicated work, lost information or avoidable interruption. Ask how the buyer measures the problem now.

**Delivery test.** Can you describe the workflow, inputs, dependencies, failure conditions, reviewer and prohibited actions in ordinary language? “We train AI on your business” is not an adequate explanation. A system that searches an approved document set is not necessarily trained on those documents; retrieval, instructions and fine-tuning are different approaches.

## Problem interviews, not disguised sales pitches

Speak to a small, relevant and varied group. Ask about the most recent time the problem occurred, the current workaround, the people involved, what has already been tried, and what would make a pilot worthwhile or unacceptable. A positive reaction is not a buying decision. A willingness to share an appropriate sample, involve the process owner or discuss a paid assessment is stronger evidence, but still not a contract.

Use notes that are necessary and proportionate. Do not add interviewees to marketing lists without considering the applicable rules. Do not present an interviewee as a client, imply an endorsement or quote them publicly without permission.

## Safe drafting prompt: turn notes into a first offer draft

Use this only with approved, non-confidential notes. Do **not** paste credentials, API keys, passwords, client personal data, commercially sensitive documents, private emails or information you are not authorised to disclose.

Using only the notes below, draft a one-page proposal outline for a bounded AI services assessment. State the buyer, process, known facts, assumptions, proposed deliverables, explicit exclusions, client dependencies, human-review points, manual fallback, questions still unanswered and risks needing specialist review. Do not invent results, client names, legal conclusions, security assurances, prices or timelines. Mark any missing information as “to confirm”.

**Approved context and notes:** [paste only authorised, minimised information]

**Human review before use:** Check every factual statement against your source notes. Remove any confidential information. Confirm that scope, permissions, price, timetable and legal/privacy wording are your own and are suitable for the client. The output is a draft, not a decision or an instruction to send it.

### Action: evidence-led wedge

- ☐ My positioning sentence is specific enough to test.
- ☐ I can name at least three plausible organisations or contexts that fit it.
- ☐ I have planned problem conversations rather than sending a generic pitch.
- ☐ I have recorded facts separately from assumptions.
- ☐ I have written the system’s allowed inputs, reviewer and prohibited actions.

## Lesson 4 — Package an offer a buyer can understand

A productised offer has a repeatable core: a defined buyer, scope, deliverables, process and price logic. It does not mean every client is identical, and it does not remove the need for discovery.

A practical sequence is **Assess** → **Pilot** → **Support**. Each stage should provide value on its own. A client should not need to buy the next stage to receive what you promised in the current one.

### The assessment

Review one agreed process, interview its owner and identify whether AI or automation is justified. Possible deliverables include a process map, baseline assumptions, candidate options, dependencies, risk notes and a recommendation. Include the possibility that a non-AI process change is the better answer.

A short assessment does not certify a company as compliant or diagnose every process. State what evidence you used and what remains uncertain. Decide whether a short introductory conversation is unpaid commercial discovery or whether the assessment itself is a defined paid deliverable.

## The bounded pilot

Implement one agreed use case in a controlled environment. Define supported inputs, outputs, access permissions, human review, testing, failure handling and a manual fallback. Say whether the work is a demonstration, a limited live trial or a production-ready deployment. Those are different commitments.

Use a written statement of work. It should address deliverables, assumptions, client dependencies, price, payment dates, acceptance criteria, change control and support boundaries. A short scope summary helps but is not a substitute for suitable contractual terms.

## Ongoing support

Support can cover monitoring, issue handling, provider/model changes, reporting or agreed improvements. It is work with continuing obligations, not passive income. State included activities or hours, response arrangements, exclusions, usage costs and how additional work is priced. Do not imply unlimited revisions, uncapped calls or a new build every quarter unless you can genuinely provide them.

## Your one-page offer canvas

| Field                                                       | Your working answer |
|-------------------------------------------------------------|---------------------|
| Offer name and intended buyer                               |                     |
| Problem and agreed deliverables                             |                     |
| Supported inputs, systems and languages                     |                     |
| Exclusions and prohibited actions                           |                     |
| Client responsibilities and prerequisites                   |                     |
| Timeline assumptions and pause conditions                   |                     |
| Price basis, third-party costs and VAT treatment to confirm |                     |
| Acceptance evidence and named reviewer                      |                     |
| Human review, escalation and manual fallback                |                     |
| Support boundary and account/asset ownership                |                     |
| Contract, security or specialist review needed              |                     |

**Fictional example.** An enquiry-routing pilot covers one shared inbox, three agreed categories, internal draft preparation and a human review queue. It excludes automatic sending, accounting changes, outbound marketing, additional languages and price decisions. The client supplies approved examples, authorised access and a reviewer. The production decision follows the pilot evidence; it is not assumed in advance.

### Action: write an offer people can assess

- ☐ I have a named assessment, pilot or support offer.
- ☐ I have stated deliverables and exclusions in plain English.
- ☐ I have listed client dependencies and pause conditions.
- ☐ I have defined acceptance evidence rather than promising “full automation”.
- ☐ I have included a human reviewer and a manual fallback.

## Lesson 5 — Price with value, cost and uncertainty in view

A buyer may care about the value of an improvement, while you need to understand the cost and capacity needed to deliver it. Both perspectives matter. Neither justifies a made-up return on investment.

Start with a baseline: how often the task occurs, how long it takes, who performs it and what delay or failure costs. Record the source and uncertainty of every input. Time saved may create capacity; it does not automatically cut payroll or create revenue. The client may need to redeploy time, avoid overtime or serve additional demand before a financial benefit is realised.

### Illustrative value calculation

The following is a **teaching example only**, not an Ascendea price, client result, market rate, savings claim or predicted payback.

A client estimates that enquiry administration takes 10 hours per week. A supervised workflow may reduce that by 4 hours, subject to pilot verification. The assumed blended staff cost is £25 per hour and the planning year uses 48 working weeks.

- Illustrative annual **capacity value**:  $4 \text{ hours} \times £25 \times 48 \text{ weeks} = £4,800$ .
- Illustrative recurring tool and usage cost:  $£100 \times 12 = £1,200$  per year.
- Remaining capacity-value figure before implementation and other costs:  $£4,800 - £1,200 = £3,600$ .

If illustrative implementation cost were £3,000, a simplified calculation would show 10 months to recover that cost: £3,000 ÷ £300 monthly net capacity value. That only has meaning if the time change is real, the benefit can actually be realised and the recurring costs and human review effort hold. A pilot can show that the benefit is lower, review takes longer or costs increase.

## Calculate your delivery cost floor

Estimate discovery, build, testing, documentation, feedback, handover, direct software/API costs and any specialist support. Include contingency based on the uncertainty in the work.

For a separate **illustrative** stress test, 30 delivery hours valued internally at £60 per hour, a 50% hour contingency and £200 of direct cost gives:

$$(30 \times 1.5 \times £60) + £200 = £2,900 \text{ planned delivery cost.}$$

At an illustrative fee of £3,500, the difference is £600, around 17.1% of the fee, before other overhead, tax and unpaid sales time. This is not a recommended margin or rate; it shows why a price that sounds substantial can leave little room for error.

## Test the downside before publishing a price

Run a reduced-benefit scenario, a higher-usage scenario and an overrun scenario. Ask what changes if data arrives late, an integration requires paid access or human review takes longer than expected. Do not use a universal percentage of “annual value” as if it determines a fair price. Scope, risk, alternatives, client budget, capability and service obligations all matter.

Separate your fee from third-party subscriptions, API usage, telephony, hosting and other consumption costs. State who pays, what is included, whether there is a cap and what happens when usage rises. Confirm whether figures include or exclude VAT where applicable; seek qualified advice for tax and contract terms.

## Action: value and cost worksheet

- ☐ I have written the baseline volume, time, source and observation period.
- ☐ I have separated gross capacity value from realised cash benefit.
- ☐ I have listed one-off, recurring and third-party costs.
- ☐ I have stress-tested reduced benefit, higher usage and delivery overrun.
- ☐ I have named the assumptions that a pilot must verify.
- ☐ I have stated whether any price is inclusive or exclusive of VAT, where applicable.

## Lesson 6 — Build a relevant and compliant client pipeline

A pipeline records real commercial conversations and decisions. It is not a count of messages sent. Start where you have genuine relevance: former professional contacts, partners, networks and communities. Add a modest amount of carefully targeted outreach and useful evidence-led content only where it is appropriate and lawful.

### A sustainable working rhythm

Set separate recurring blocks for research, relevant outreach, conversations, follow-up and evidence-led content. Keep delivery and support commitments visible. An **illustrative** first week might involve researching 20 suitable organisations, sending 10 individually relevant messages where lawful and appropriate, asking two contacts for a specific introduction and publishing one useful explanation of the problem you solve. These are controllable activities, not meeting or client promises.

Improve targeting and relevance before increasing volume. Do not rely on generic vendor quotas, automated sequences or a daily direct-message target as evidence of platform permission, legal compliance or likely results.

### UK outreach: apply PECR and UK GDPR with care

This is general education, not legal advice. The ICO says its business-to-business marketing guidance is under review following the Data (Use and Access) Act, so recheck the current guidance before a campaign.<sup>2</sup>

**Corporate subscribers.** Companies and LLPs are generally corporate subscribers. For electronic marketing such as email or text, the PECR rule on direct marketing by electronic mail does not apply to corporate subscribers. You must not conceal your identity and must provide a valid address for opt-outs. Keep and screen against a suppression list, and honour opt-outs and objections.<sup>2</sup>

**Sole traders and certain partnerships.** Sole traders and certain non-limited partnerships are individual subscribers under PECR and receive greater protection. Do **not** assume that a business address makes cold email permissible. Consent or a valid applicable exception may be required. If the status is uncertain, verify it or use the more protective route; obtain specialist advice for your circumstances.<sup>2</sup>

**UK GDPR and business contact data.** Where you process identifiable contact data, including data collected from public sources, UK GDPR duties still apply. Identify and document a suitable lawful basis, give any required privacy information, minimise data, protect it, respect objections and stop direct marketing where required. A visible business email address is not a general permission to ignore those duties.<sup>2</sup>

**Other channels.** Social direct messages can fall within the broad definition of electronic mail. Accepting a connection is not automatically consent to marketing. Live telephone marketing and automated calls have separate rules; check the relevant TPS/CTPS registers, objections and consent requirements before calling. Do not assume an AI voice agent can make marketing calls under ordinary B2B email assumptions.<sup>2</sup>

## Write truthful, proportionate messages

Reference something genuinely relevant. Explain the business problem in one short sentence and offer a modest next step. Do not invent familiarity, a previous thread, a client result or a referral.

**Sample email — adapt only after compliance checks.**

**Subject:** A question about enquiry routing at [Company]

Hello [Name], I noticed [a genuine, relevant observation]. I am testing a focused AI-assisted enquiry-routing service for [specific business type], with human review for unclear requests. Is routing incoming enquiries a current issue for your team? If it is relevant, I can outline a small assessment. If it is not, please let me know and I will not follow up. [Your identity, business contact details and privacy information as appropriate.]

Use “I am testing” if that is true; do not borrow an implied track record. Stop a sequence when someone objects or opts out. Do not put them into an automatic recontact campaign. Review results at a planned interval and change one meaningful variable at a time, while correcting misleading or non-compliant activity immediately.

## Keep pipeline maths honest

A rate from an ebook is not a benchmark. If, purely illustratively, 100 distinct contacts produced an assumed 1% meeting rate, that would be one meeting, not five. Record denominators and date ranges. Keep delivered messages, replies, positive replies, qualified meetings, proposals and paid engagements separate. Three follow-ups to one person are not three new prospects.

## Action: compliant pipeline setup

- ☐ I have defined who fits my buyer and who does not.
- ☐ I have verified the recipient type: corporate subscriber, sole trader/individual subscriber or uncertain.
- ☐ I have completed the appropriate PECR/UK GDPR checks before contact.
- ☐ My message identifies me honestly and includes an appropriate opt-out route.
- ☐ I maintain a suppression list and will screen new activity against it.
- ☐ I track distinct contacts and each pipeline stage with clear denominators.

- ☐ I will stop immediately for objections, opt-outs or an identified compliance issue.

## Lesson 7 — Deliver a bounded pilot, not an uncontrolled experiment

A signed project is not a reason to remove safeguards. The source course used a 14-day sprint concept. Treat a short pilot as an **illustrative planning sequence**, not a universal delivery promise: approvals, procurement, security work, data readiness and complex integrations may require more time.

Before work begins, define what “done” means: the intended outcome, supported inputs, explicit exclusions, acceptance evidence, named client owner and reviewer, necessary permissions, test data, dependencies and change process. Do not start a timebox before essential access and approvals exist.

### Illustrative 10-business-day pilot sequence

| Stage        | Purpose and evidence                                                                                                                                                            |
|--------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Before day 1 | Confirm scope, data permissions, client dependencies, baseline, test plan and manual fallback. Decide whether a privacy/security assessment or specialist approval is needed.   |
| Days 1–2     | Map the current process and configure a controlled environment. Confirm allowed actions, logging and credential handling. Demonstrate a simple path with appropriate test data. |
| Days 3–5     | Build the agreed workflow. Keep outputs internal or supervised. Record ambiguous inputs, failures and usage cost. Send a short progress update; do not silently expand scope.   |
| Day 6        | Review the working pilot against the test plan and baseline. Classify feedback as a defect, in-scope refinement or a proposed change.                                           |
| Days 7–9     | Refine, test held-out cases, check permissions and failure handling, and prepare operating notes. Recheck after meaningful prompt, model, integration or data changes.          |

| Stage  | Purpose and evidence                                                                                                                 |
|--------|--------------------------------------------------------------------------------------------------------------------------------------|
| Day 10 | Review evidence and decide whether to accept the pilot, extend testing, revise scope or stop. A live release is a separate decision. |

## Scope lock and change control

Use a written scope lock or statement of work. It should name:

- the single outcome and exact deliverables;
- what is out of scope and prohibited;
- assumptions, client inputs and the named reviewer;
- the success/acceptance test;
- payment, ownership, support and change-control arrangements.

When a client asks for something outside the agreement, explain the impact and offer a written option. For example: “That adds a second integration beyond the current pilot. I can scope it separately and show the cost and timing before you decide. The existing pilot remains focused on the agreed outcome.” Do not punish sensible questions with arbitrary pricing, but do not accept unplanned obligations simply to avoid a difficult conversation.

## Design for error, uncertainty and misuse

An AI output can be plausible and wrong. Decide how the workflow detects insufficient information, where it escalates and what a person must approve. Restrict tools and permissions to what the task requires. Do not let an instruction embedded in an untrusted email or document override the permitted task.

Test malformed inputs, unsupported requests, duplicate events, unavailable APIs, rate limits and partial failures. Make retries safe so an action is not repeated accidentally. For knowledge assistants, test whether a user can retrieve information they are not authorised to see. For systems that can act, use restricted permissions, approval steps for consequential actions and an audit trail.

A demonstration score is not production proof. For example, 19 correct outputs out of 20 describes only that small test. Use representative, permitted test data with common cases, edge cases and failure conditions. Hold some cases back from refinement, label expected results with the client and record sample size, selection method, failures and residual risks. Serious privacy or unsafe-action failures are blockers even where an average score looks good.

## Handover and operating boundary

Provide an operating guide with permitted use, limitations, account ownership, monitoring, troubleshooting, backup/recovery arrangements, support route and a method to disable the workflow. Train actual users to spot uncertain outputs, correct an error and report a problem. State what data may be submitted and what must remain outside the system.

**Fictional example.** A logistics firm tests supervised quote-request routing. Ordinary messages route well, while urgent exceptions do not. The team keeps urgent cases in a human queue, documents the boundary and extends testing before considering a wider release. That is a useful pilot decision, not a failed result.

## Action: pilot release checklist

- ☐ The client has authorised the data, access and permitted purpose.
- ☐ I have a written scope, acceptance criteria and change route.
- ☐ A named person reviews uncertain or consequential outputs.
- ☐ The workflow has limited permissions and an available manual fallback.
- ☐ I have tested representative and held-out cases, not only the demo set.
- ☐ I have recorded failures, costs, review workload and residual risks.
- ☐ Live release authority is separate from pilot acceptance.

# Lesson 8 — Turn delivery evidence into a stronger relationship

A completed project may create useful evidence, a support need or a relevant introduction. None is automatic. Resolve outstanding problems before asking for promotional support.

## Prepare a truthful case study

Describe the context, problem, intervention, measurement period, result and limitations. Distinguish a target from an achieved result, a supervised test from production performance, and capacity value from cash savings. Use a client's name, logo, quote or screenshot only with permission and agreed wording. If the client prefers anonymity, avoid details that can identify them indirectly.

A careful result statement might read: "Across the agreed two-week supervised trial, the team reported less manual sorting time. The observation included review and exception handling. Further observation is needed to assess sustained performance." Replace this with actual, supportable evidence or do not publish a result.

## Offer support around a real need

Explain what needs maintaining, what happens if it is not maintained and what is included. The client may choose internal ownership, limited support or an ongoing arrangement. Make exit arrangements clear: client accounts and configuration must not be inaccessible simply because the engagement ended.

## Make a specific, optional introduction request

Only after value is demonstrated and the client is comfortable, ask whether they know someone with a similar problem. Let the contact choose whether to introduce you; do not transfer someone's details into an unsolicited campaign as if an introduction were consent. There is no universal deadline or guaranteed referral rate.

## Action: post-delivery review

- ☐ I have checked actual use, benefits, review effort and unresolved issues.
- ☐ I have compared quoted and actual time, direct costs and support load.
- ☐ Any case study has factual evidence and written permission.
- ☐ My support proposal states scope, ownership, cost and exit arrangements.
- ☐ Any request for an introduction is specific, optional and respectful.
- ☐ I have recorded reusable learning without carrying client confidential information forward.

# Lesson 9 — Plan the next 90 days as a learning cycle

The next 90 days are a structured commercial and delivery test. Controllable goals are a validated problem, a defensible offer, relevant conversations and a safe delivery approach. Paid work may be an aim, but it is not guaranteed by a calendar.

The phases can overlap. Protect enough sales time to learn from the market, but do not sell work beyond your capability or capacity. If an approval, skill or dependency is missing, update the plan rather than treating the date as proof of readiness.

## A 90-day working plan

| Period     | Focus                                                                                                                                                                           | Evidence to seek                                                                                            |
|------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------|
| Weeks 1–2  | Choose one model and buyer; inventory capability; conduct problem conversations; draft the positioning sentence and one-page offer.                                             | A specific buyer/process, repeated observations, an honest list of unknowns and a scoped next step.         |
| Weeks 3–4  | Run a small compliant outreach/referral routine; record conversation quality; publish one useful, non-confidential explanation or controlled demonstration.                     | Relevant conversations, documented objections, a clearer offer and a justified proposal where there is fit. |
| Weeks 5–8  | If a suitable engagement exists, complete the agreed assessment or bounded pilot. If not, continue focused validation rather than building a large speculative product.         | Delivery evidence or a clear diagnosis of the commercial barrier.                                           |
| Weeks 9–12 | Review actual usage where available; offer proportionate support; seek case-study permission when warranted; decide whether to continue, narrow, change buyer, partner or stop. | A reasoned next-quarter decision grounded in pipeline, costs, commitments, quality and capability evidence. |

## Seven-part self-assessment

Score each area from 1 to 5 for your own review: **1** means not yet defined; **3** means a usable draft; **5** means supported by evidence and working in practice. It is an internal focus tool, not a comparison with other agencies.

| Area                       | Score (1–5) | Evidence I have | Next action, owner and date |
|----------------------------|-------------|-----------------|-----------------------------|
| Model and capability       |             |                 |                             |
| Buyer and problem evidence |             |                 |                             |
| Offer and scope            |             |                 |                             |

| Area                                | Score (1–5) | Evidence I have | Next action, owner and date |
|-------------------------------------|-------------|-----------------|-----------------------------|
| Pricing and delivery economics      |             |                 |                             |
| Pipeline quality and compliance     |             |                 |                             |
| Delivery, QA and governance         |             |                 |                             |
| Support, evidence and introductions |             |                 |                             |

Choose the lowest-scoring area as your primary improvement for the next week. Do not try to redesign every phase at once.

## Weekly management review

At the end of each week, review five things:

1. Commercial conversations, proposals and decisions.
2. Cash, committed costs and forecast assumptions.
3. Delivery progress, client dependencies and capacity.
4. Quality, security, data-protection or compliance issues.
5. One or two improvements, with a named owner and date.

Keep actuals separate from forecasts. A weak fit revealed early can save time and money; it is evidence, not a personal failure.

## Independent launch checklist

Use this checklist on its own before presenting an AI services offer, starting outreach or releasing a pilot.

### Focus and capability

- ☐ I can state one buyer, one process and one bounded outcome in plain English.
- ☐ I have evidence that the problem occurs, rather than relying on general enthusiasm for AI.
- ☐ I have identified the process user, budget owner and any approver.

- ☐ I can deliver the initial scope safely or have a named, suitable partner.
- ☐ I have written what I will not sell yet.
- ☐ I selected tools for a real requirement and checked current provider documentation, limits, data terms and costs.

## Offer and economics

- ☐ I have a one-page offer with deliverables, exclusions, client responsibilities, acceptance evidence and a human-review boundary.
- ☐ I have written the data inputs, permitted purpose, access permissions and manual fallback.
- ☐ I have separated my fee from recurring third-party and consumption costs.
- ☐ I have labelled all prices, calculations, working weeks and time estimates as assumptions until verified.
- ☐ I have tested reduced benefit, higher usage and delivery overrun scenarios.
- ☐ I have stated VAT treatment to confirm and will seek appropriate tax/contract advice where needed.

## Outreach and records

- ☐ I have classified each outreach recipient correctly or used the more protective route when status is uncertain.
- ☐ I have completed PECR and UK GDPR checks appropriate to the channel and recipient.
- ☐ My message is truthful, identifies my business and has an appropriate opt-out route.
- ☐ I maintain and apply a suppression list; objections and opt-outs stop future marketing activity.
- ☐ I keep only necessary prospect information, record the source and protect it appropriately.
- ☐ I record distinct contacts, replies, qualified meetings, proposals and decisions separately.

## Delivery and release

- ☐ The client has authorised the data, access and purpose before work begins.
- ☐ I have a written scope, dependencies, acceptance criteria, payment/change control and support boundary.
- ☐ A named human reviews uncertain or consequential output.
- ☐ The system has least-privilege permissions, a manual fallback and a way to stop or roll back.
- ☐ I have tested common, edge and failure cases with permitted data; held-out cases were not used to tune the workflow.
- ☐ I have recorded evidence, failures, limitations, review workload, costs and residual risks.

- ☐ A production release decision is separate from a working demonstration or pilot handover.

## After delivery

- ☐ I have checked actual use and addressed outstanding issues before requesting promotional support.
- ☐ I will publish a case study, testimonial, client name, logo or screenshot only with permission and evidence.
- ☐ I have compared actual delivery economics with my estimate.
- ☐ Any support offer has clear scope, cost, ownership, monitoring and exit arrangements.
- ☐ I will ask for an introduction only where it is relevant, optional and respectful.

## Responsible AI and data-handling reminder

For every engagement, keep a proportionate evidence record: purpose, scope, authorised data, tests, review decisions, change history and known limitations. The ICO's AI guidance addresses accountability and governance, transparency, lawfulness, accuracy, fairness, security/data minimisation and individual rights. It is under review, so confirm current requirements and obtain qualified advice where appropriate.<sup>3</sup>

If personal data processing is likely to create high risk, assess whether a data protection impact assessment is required before processing begins. A DPIA is not a compliance badge: the purpose, lawful basis, safeguards and the rest of the data-protection analysis still need to be appropriate.<sup>3</sup>

Do not allow an agent to make binding promises, give regulated advice, change important records, make high-impact decisions or take other consequential actions unless that authority is explicitly designed, authorised, tested and subject to proportionate human control. When risk or contract terms demand it, bring in qualified legal, security, data-protection or sector expertise.

## Use notice and educational disclaimer

This is general business education for personal learning and permitted end use. It is not legal, tax, financial, security, clinical, medical or other professional advice. Obtain advice from an appropriately qualified professional for your circumstances.

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Technology features, prices and UK guidance can change. Recheck official sources and provider documentation before implementation.

# Current references

1. [OpenAI Assistants migration guide](https://developers.openai.com/api/docs/assistants/migration)

<https://developers.openai.com/api/docs/assistants/migration>

2. [Information Commissioner's Office: Business-to-business marketing](https://ico.org.uk/for-organisations/direct-marketing-and-privacy-and-electronic-communications/business-to-business-marketing/)

<https://ico.org.uk/for-organisations/direct-marketing-and-privacy-and-electronic-communications/business-to-business-marketing/>

3. [Information Commissioner's Office: Guidance on AI and data protection](https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/artificial-intelligence/guidance-on-ai-and-data-protection/)

<https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/artificial-intelligence/guidance-on-ai-and-data-protection/>