



AI WORKFLOW AUTOMATION

AI-Assisted Intake Triage Workflow

Representative work sample | Sanitized composite

OVERVIEW

WS01

4-6 weeks

Forge Honor Assurance



AI-Assisted Intake Triage Workflow

Representative sample engagement for secure AI workflow automation.

ENGAGEMENT FIT

Operations teams receiving email, forms, PDFs, and inconsistent requests that need triage, routing, review, and reporting.

SCENARIO

A mid-sized operations team receives 80-150 requests per week through shared mailboxes, web forms, and attached PDFs. Staff manually read each request, summarize the issue, copy details into a tracker, decide who should handle it, and send a status note. The process is slow, inconsistent, and difficult to audit when sensitive records are involved.

CONSTRAINTS

- No autonomous external replies during the first release; every outgoing message needs human approval.
- Sensitive data may be present in attachments, so the data boundary and retention rules must be explicit.
- The system must preserve the original source artifact, extracted fields, model output, reviewer edits, and routing decision.
- The first release needs to work with existing email/storage systems rather than forcing a new enterprise platform.

This is a representative composite report showing the type of work product Forge Honor Assurance can provide. It is not a client case study.

REPORT DATA

SAMPLE ID

WS01

CATEGORY

AI Workflow Automation

TIMEFRAME

4-6 weeks

BEST FOR

Operations teams receiving email, forms, PDFs, and inconsistent requests that need triage, routing, review, and reporting.

USE NOTE

Representative composite sample. No client PII, proprietary environment detail, or confidential facts are included.

Final scopes, controls, deliverables, and timelines are confirmed in writing per engagement.



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DELIVERY PLAN

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Scope and Delivery Plan

A practical work plan with written scope, explicit boundaries, and deliverables the buyer can inspect.

SCOPE

- Map the intake workflow, decision points, data fields, and failure modes.
- Design a secure AI-assisted summarization and classification workflow with human review before action.
- Build or prototype a queue that shows source record, extracted fields, suggested route, confidence, risk flags, and reviewer status.
- Create evaluation examples that test summarization quality, classification accuracy, refusal behavior, and edge cases.
- Deliver an operating runbook with review responsibilities, escalation rules, and maintenance notes.

TIMELINE

PHASE	FOCUS	EXPECTED WORK
Week 0	Scope and data boundary	Confirm intake channels, sensitive data rules, user roles, success metrics, and what the first release must not do.
Week 1	Workflow and schema	Define fields, routing taxonomy, review states, audit events, and the handoff format for downstream teams.
Weeks 2-3	Build workflow	Implement extraction, LLM-assisted summary, classification, risk flags, queue views, and reviewer edits.
Week 4	Evaluation and hardening	Run test cases, tune prompts/routing rules, verify logging, and test fallback behavior.
Weeks 5-6	Pilot and handoff	Pilot with a small request set, update runbook, document known limitations, and train reviewers.

DELIVERABLES

- Workflow map:** Current-state and future-state flow showing channels, data stores, review points, and escalation paths.
- AI workflow:** Working triage flow or deployable prototype for summarization, classification, risk flags, and routing.
- Review queue:** Human approval queue with status, reviewer edits, source references, and audit log.
- Evaluation packet:** Test cases, expected behavior, acceptance thresholds, and known failure modes.
- Operating runbook:** Reviewer responsibilities, escalation rules, retry behavior, and maintenance notes.



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SAMPLE OUTPUT

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Sample triage record

This is the style of normalized output a reviewer would see before approving routing.

FIELD	EXAMPLE OUTPUT	REVIEW NOTE
Source	shared-inbox / PDF attachment / web form	Source artifact preserved with immutable ID.
Summary	Requester needs access restored for an internal reporting dashboard before month-end close.	Reviewer can edit before save.
Suggested route	Data platform support	Confidence 0.82; requires human approval.
Risk flags	Mentions access issue and deadline; no regulated data detected in excerpt.	Flag rules are visible to reviewer.
Next action	Create support ticket and request owner approval evidence.	No external message sent automatically.

HANDOFF

- The buyer receives a working workflow or deployable prototype, written configuration notes, and a reviewer runbook.
- The first release should measure summary edit rate, routing correction rate, reviewer time saved, and exception volume.
- Future phases can add integrations, richer dashboards, automated draft responses, or stricter model evaluation.



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Evaluation examples

The goal is not to claim perfect AI accuracy. The goal is to measure useful behavior and catch risky failure modes.

TEST CLASS	EXPECTED RESULT	PASS SIGNAL
Ambiguous request	Ask for reviewer clarification; do not route automatically.	Model output has no final route.
Sensitive attachment	Summarize only approved fields and flag manual review.	No protected field appears in summary.
Duplicate request	Link likely duplicate and avoid new ticket unless reviewer approves.	Duplicate candidate shown.
Out-of-scope request	Mark out of scope and route to manual review.	No unsupported action proposed.

BOUNDARIES

- This sample does not promise autonomous decision-making or unattended outbound communication.
- Production use with sensitive data requires buyer-approved data handling, access control, and retention decisions.
- The engagement does not provide legal compliance certification.