

Product and service one-pager

Map before you build, find what is worth automating.

A practical instrument for COOs and transformation leads who need to defend a workflow-first decision internally — and pick the right first process to automate.

Process Discovery becomes a working roadmap, not a slide deck — the output feeds directly into AxeStudio build and platform deployment without changing partners.

ASSET PROMISE

Turns undocumented, fragmented work into a scored, prioritized AI-readiness map a leadership team can act on.

BEST AUDIENCE

COOs, transformation leaders, process owners, government modernization teams

RECOMMENDED USE

Use before or after an enterprise briefing to help the buyer align internal stakeholders and define a practical next step.

METHODOLOGY

Process Discovery follows a structured seven-step sequence. Each step is a prerequisite for the next — skipping one means the automation that follows is built on assumption rather than evidence.

01

Identify workflow owner

Name one person accountable for the process end to end. If ownership is disputed or shared informally, surface that now — it will block adoption later. No owner, no pilot.

02

Gather forms, documents, and source systems

Collect the actual materials the process runs on: intake forms, review templates, approval emails, spreadsheets, legacy system exports. The document set reveals what the process really does, not what the org chart says it does.

03

Interview frontline users

Structured interviews with the people who do the work daily. They hold the exception logic, the workarounds, and the undocumented decision rules that no policy document captures.



04

Map the current state

Draw the process as it actually runs — including handoffs, approval loops, rework cycles, and informal fixes. The map makes invisible failure points visible and gives leadership a shared picture to argue from.

05

Measure the baseline

Establish observable measures of current performance: volume per period, average cycle time, known error or rework rate, cost of manual effort. Qualitative if no system captures it — the goal is a reference point, not a precise metric.

06

Score AI fit

Apply the Workflow Fit Scorecard across seven dimensions. The score is ordinal and descriptive — it ranks candidate processes against each other and flags dimensions that need remediation before a pilot can succeed.

07

Define the future state

Design the AI-enabled version of the workflow: where an agent handles volume work, where a human retains the decision, where an approval gate is required by policy or risk. The future-state design is the input to AxeStudio implementation.

01

The problem

Most organizations do not have a clean map of how work really happens. Processes live in email threads, spreadsheets, shared drives, employee memory, legacy systems, and informal approvals that exist nowhere in writing. When leadership decides to introduce AI, the team reaches for a tool or a model before anyone has documented what the process actually is, who owns it, or what good looks like. The result is an expensive pilot built on assumption — agents that handle the easy cases and break on the exceptions, adoption that stalls because users never trusted the system, and a governance gap that surfaces during the first audit. Process Discovery exists to prevent that pattern. It puts the map before the build.

02

What Process Discovery does

Axeron uses structured interviews, document analysis, system review, and workflow mapping to understand how work currently happens — including the parts that are undocumented, informal, or carried in the heads of experienced employees. That current-state picture is then used to design an AI-enabled future state: where an agent can handle volume and preparation work, where a human retains the decision, and where a governance gate is required by policy or risk.

- Employee interview capture

- Document and form analysis

- Current-state process maps

- Bottleneck and rework identification

- AI opportunity scoring

- Future-state agentic workflow design

- Business case and pilot recommendation

03

Why it matters

Process Discovery prevents the organization from automating the wrong thing. Without it, teams optimize a process that should be eliminated, automate a workflow that has no clear owner, or build an agent that handles 60% of cases and creates new manual work for the other 40%. Discovery also gives leadership a shared vocabulary. A COO who can show the CFO a scored process map — with a named owner, a measurable baseline, and a defined risk boundary — is making a fundable argument. A COO who says 'we want to try AI on this' is not.

04

Output

The client receives a practical roadmap, not a theoretical transformation deck. The output is designed to feed directly into AxeStudio implementation and Axeron platform deployment — so the discovery work does not sit on a shelf. Deliverables include a current-state workflow map, a future-state agentic design, a scored AI-opportunity matrix across candidate processes, a readiness assessment against the seven dimensions, data and integration notes, governance recommendations, and a pilot recommendation with a measurable success definition.

- | | |
|---|--|
| · Current-state workflow map | · Future-state agentic workflow design |
| · AI-opportunity scoring matrix | · Workflow readiness assessment |
| · Data and integration readiness notes | · Governance and risk boundary recommendations |
| · Pilot recommendation and success definition | |

05

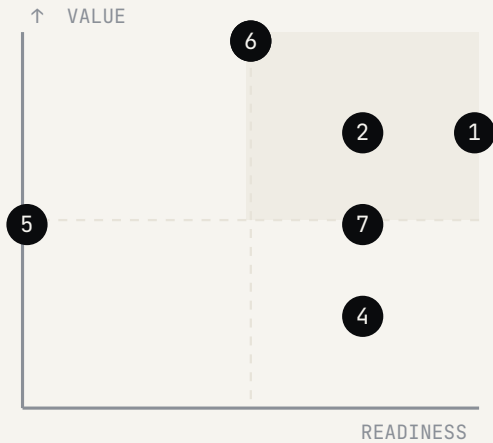
Best-fit workflows

Process Discovery is strongest where work is repetitive, document-heavy, slow, fragmented across systems, or dependent on experienced employees who carry process knowledge in their heads. The pattern that consistently produces a viable first pilot: a bounded administrative or review process with a clear owner, observable volume, structured input documents, and a decision that requires human sign-off. That combination means an agent can handle the preparation work immediately, a human retains the judgment call, and the improvement is measurable from day one.

- | | |
|-------------------------------------|---|
| · Document review and extraction | · Permit and license processing |
| · Case triage and intake routing | · Compliance and audit evidence preparation |
| · Procurement and contract review | · Grant and application assessment |
| · High-volume operational approvals | |

AI-OPPORTUNITY MATRIX

The AI-Opportunity Matrix plots candidate workflows on two qualitative axes — business value and AI readiness — so leadership can prioritize without relying on invented benchmarks. Placement is directional, not precise. The purpose is to force a conversation, not replace one.



Start here

High value, high readiness. The process has a clear owner, a measurable baseline, structured documents, and a containable risk boundary. This is the first pilot.

Prepare first

High value, low readiness. The business case is strong but data, ownership, or governance gaps must be resolved before automation. Discovery defines what to fix.

Consider later

High readiness, lower value. The process is technically automatable but the operational impact is modest. Useful as a learning pilot; not the flagship.

Deprioritize

Low value, low readiness. Bespoke, irregular, or politically contested. Automating here is expensive and the gain is unclear. Return after the first pilot succeeds.

- Document review and extraction
- Permit and license processing
- Case triage and routing
- Ad hoc reporting requests
- Bespoke analysis and advisory
- KYC and compliance review
- Procurement document review

WORKFLOW-READINESS SCORECARD

Run this rubric against one candidate workflow before committing to a pilot. Score each dimension as Weak, Workable, or Strong. A mix of Workable and Strong across all seven means the process is a viable first pilot. A single Weak on Business Ownership or Risk Boundary is a blocker — resolve it before building anything.

01 Business ownership

Is there one named person accountable for this process end to end — someone who can approve the future-state design, own the pilot KPIs, and handle exceptions when the agent is wrong? Strong: named owner with budget authority. Workable: named owner, shared accountability. Weak: ownership is a committee or informally distributed.

02 Baseline measurability

Can the current performance of this process be observed, even approximately? Strong: volume, cycle time, and error rate are already tracked in a system. Workable: these can be estimated from interviews and logs within a week. Weak: no one knows how much work flows through or how long it takes.

03 Repeatability

Does this process follow a recognizable pattern most of the time, or is every instance bespoke? Strong: the same steps apply to the same inputs in the same order for more than 80% of cases. Workable: a core pattern exists with a manageable set of exception types. Weak: every case is negotiated from scratch.

**04 Document and evidence density**

How much of the work involves reading, comparing, preparing, or routing documents and structured data? Strong: the majority of the process is document-driven — intake forms, review templates, evidence packs, approval letters. Workable: documents are present but mixed with significant judgment calls. Weak: the process is primarily relational or tacit.

05 Data clarity and source of truth

Are the inputs to this process available, reasonably clean, and traceable to a known system? Strong: source documents and data are in defined locations; a human can find them consistently. Workable: sources are known but scattered across two or three systems and require manual assembly. Weak: data is missing, siloed, or of unknown provenance.

06 Risk boundary

Can the high-stakes decision or action in this process be cleanly separated from the preparatory work an agent would handle? Strong: there is a clear, policy-backed approval step a human owns; the agent prepares but does not decide. Workable: a boundary can be designed with moderate change-management effort. Weak: human judgment and automated action are entangled throughout, with no natural checkpoint.

07 Visible impact lever

If this process ran faster, more consistently, or with fewer errors, would leadership notice? Strong: the impact connects directly to a cost center, a compliance obligation, a customer-facing SLA, or a known quality problem. Workable: the impact is real but affects an internal team rather than an external stakeholder. Weak: the value of improvement is diffuse or contested.

WHY AI PILOTS FAIL

Most AI pilots fail for the same small set of reasons. Each failure pattern is recognizable before the build starts — if you know what to look for. The following are the conditions Process Discovery is designed to surface and resolve before a single line of agent code is written.

WHY AI PILOTS FAIL

- × Do not start with a platform purchase before mapping the process. The platform selection shapes what is possible; the process map should shape the platform selection. Buying first inverts that relationship and anchors the discovery to what the tool can do rather than what the work requires.
- × Do not automate a process that has no named owner. An agent that no one is accountable for will drift, break on exceptions, and be quietly abandoned. Ownership is not an HR formality — it is the mechanism by which the AI system stays aligned with the business over time.
- × Do not skip the current-state map because the team believes they already understand the process. The informal rules, exception paths, and undocumented workarounds that make a process fail at scale are almost never visible to leadership. They appear only in interviews with the people who do the work.
- × Do not use a fabricated or aspirational baseline as the pilot KPI. If the current cycle time is unknown, estimate it from interviews before the pilot — do not invent a number that makes the improvement look larger. A baseline the CFO cannot verify destroys the credibility of the result.
- × Do not build the most complex or visible process first. The first pilot should be chosen for its tractability, not its ambition. A bounded, repetitive, document-heavy process with clear ownership builds confidence and organizational muscle before the team attempts anything with higher political stakes.

WHAT TO DO INSTEAD

- Confirm a named, accountable process owner before any discovery work begins. That person must have the authority to approve the future-state design and own the pilot outcome.

- Establish an observable baseline — even a rough one — before defining the pilot success metric. The baseline is the reference point that makes the improvement credible.
- Draw the process as it actually runs, including exception paths and informal fixes, not as the policy document describes it. The gap between the two is usually where the rework lives.
- Define the human approval point before designing the agent's scope. The boundary between what the agent handles and what a human decides must be explicit, policy-backed, and agreed by the process owner and the governance team before build begins.
- Choose the first pilot for tractability: clear owner, structured documents, measurable baseline, manageable risk boundary, and visible operational impact. Save the complex, politically sensitive, or data-poor processes for after the organization has built trust in the system.

WHAT YOU WALK AWAY WITH

At the close of Process Discovery, the client receives a structured set of working documents — not a presentation of observations. Each output is designed to be used by a specific internal audience: the COO defending the investment decision, the CIO evaluating platform requirements, the CFO approving the pilot budget, and the team that will implement the first agent workflow.

- 01 Current-state process map showing actual workflow steps, handoffs, approval loops, exception paths, and rework cycles — annotated with the sources that informed each element.
- 02 Future-state agentic workflow design defining where an agent handles volume and preparation work, where a human retains the decision, and where a governance gate is required by policy or risk boundary.
- 03 AI-opportunity scoring matrix plotting candidate workflows on business value and readiness axes, with qualitative placement rationale for each — giving leadership a prioritization tool that does not depend on invented benchmarks.
- 04 Workflow Fit Scorecard completed for the top one or two candidate processes, showing the seven-dimension readiness assessment and a plain interpretation of what Workable and Weak dimensions mean for the pilot scope.
- 05 Data and integration readiness notes identifying source systems, document locations, known data quality gaps, and any integration dependencies the platform deployment will need to resolve.
- 06 Governance and risk boundary recommendations — which steps require human approval, what audit fields the workflow must generate, and what deployment model (SaaS, private cloud, on-prem) the process's sensitivity requires.
- 07 Pilot recommendation with a named first process, a defined success measure grounded in the observed baseline, an implementation scope, and a handoff summary for AxeStudio to begin the build phase.

WHERE IT FEEDS

Process Discovery is the entry point into the full Axeron operating model. The discovery output feeds directly into AxeStudio, which designs and implements the production workflow. The Axeron platform handles deployment, integration, and runtime governance through Continuum — monitoring behavior, gating self-improvement, and maintaining the audit trail. Data and model readiness work runs in parallel when the process requires fine-tuning or structured document preparation. The design constraint throughout is that none of these phases requires a partner change: the team that maps the process is the team that builds the agent and operates the governance layer. That continuity is not incidental — it is the mechanism by which the discovery findings actually make it into the production system rather than being reinterpreted by a separate implementation vendor who was not in the room.

BEFORE YOU START

- ☐ Identify workflow owner
- ☐ Interview frontline users
- ☐ Measure the baseline
- ☐ Define the future state
- ☐ Gather forms and documents
- ☐ Map approvals and exceptions
- ☐ Score AI fit

NEXT STEP

Use Process Discovery to find the first workflow worth building — then hand it directly to the team that will build it.

Axeron turns resource-level education into a scoped conversation: one process, one measurable outcome, one deployment model, and one governance path.