

How it works: from free Assessment to self-sufficiency.

Five steps from free Assessment to self-sufficiency. Each one earns the next. You keep the Assessment regardless, and get two hours of AI training every month on retainer.

THE JOURNEY

1 I research your business My side, before we talk

- Your website, your sector, likely tool stack
- Named roles and industry patterns so the prompts are not generic
- You do nothing on your side

30 min

2 20-minute discovery call Free, video or phone

- Short call informed by the research above
- Bigger picture: where time is going, what prompted the enquiry
- If the Assessment is not the right fit, I tell you on the call

20 min

3 The AI Assessment Free

- Eight questions sent via WhatsApp, one or two at a time
- You reply with voice notes on your schedule
- Six-page branded PDF in your inbox within 48 hours of your final note
- 45-minute readout to walk through the findings

<p>Insight A pattern in your business you had not connected</p>	<p>A plan 3-5 Quick Wins, sequenced across 14 days</p>	<p>Clarity Price ranges and scope shape for further work</p>
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20 min over 3-5 days

4 Full Operations Diagnostic Scopes the retainer

- Every process through the **ERA framework**: Eliminate, Restructure, Automate
- Progressive install of **Claude Code** (the AI tool I use) on your machine, updated as I ship improvements

AU\$4,000-\$7,000 · 2-3 weeks

5 Retainer builds what the Diagnostic mapped Month-to-month, no minimum term

- We build and refine your business processes, progressively handing the reins to your team
- **Two hours of AI training per month included**, so skills transfer as we build

from AU\$1,500/mo

XIO IMPACT

WHAT ABOUT MY DATA?

<p>Your machine Files, credentials, tool accounts never leave your computer</p>	<p>Encrypted TLS in transit, AES-256 at rest. Enterprise cloud routing available</p>	<p>Never trained on Commercial terms prohibit using your data for model training</p>
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Same trust model as Xero or Gmail. For regulated industries, route through your own AWS or Google Cloud.

WHAT IT COSTS

<p style="color: #008080; font-weight: bold; margin: 0;">ASSESSMENT</p> <p style="font-size: 1.2em; font-weight: bold; margin: 5px 0;">Free</p> <p style="font-size: 0.9em; margin: 0;">Steps 1-3. Yours to keep.</p>	<p style="color: #008080; font-weight: bold; margin: 0;">DIAGNOSTIC</p> <p style="font-size: 1.2em; font-weight: bold; margin: 5px 0;">AU\$4,000-\$7,000</p> <p style="font-size: 0.9em; margin: 0;">Step 4. 2-3 weeks, one-off.</p>	<p style="color: #008080; font-weight: bold; margin: 0;">RETAINER</p> <p style="font-size: 1.2em; font-weight: bold; margin: 5px 0;">from AU\$1,500/mo</p> <p style="font-size: 0.9em; margin: 0;">Step 5. Month-to-month, 2hrs training included.</p>
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Start with a free Assessment.

Book a 20-minute discovery call. If the Assessment is the right fit, we kick off over WhatsApp the same week.

Leo Malan CA · Chartered Accountant, 20+ years across audit, corporate finance, and commercial operations.

BOOK A DISCOVERY CALL

aiworkflowadvantage.com.au
 leo.malan@aiworkflowadvantage.com
 +61 450 743 933
 ABN: 41 359 824 830