SOUND FINANCIAL FIELD NOTES · ONEACCORD AI WORKSHOP · DAY 1

Context *before* automation.

How to put AI to work in a small business **without automating the mess.** Sagecliffe, Columbia River Gorge · Nov 9, 2026

SOUND Financial Group

1 Small tasks add up.

15	×	4	×	50	=	50
MINUTES		TIMES / WEEK		WEEKS		HOURS / YEAR

That's **one person, on one small task.** Multiply by everyone who does it, and by every task like it. That's where AI earns its keep.

2 AI needs your operating context.

PROCESS	SYSTEMS	RULES
Who does what, and when	Where the data lives	What needs sign-off

AI can't fix a broken process. It can only run the one you give it, faster.

3 Fix the foundation first.

- **Connected systems** — Tools that talk, not a desktop spreadsheet
- **A written process** — Steps, an owner, what "done" looks like
- **Clean data** — Same fields, same names, no duplicates
- **One source of truth** — Each kind of data lives in one place

BUILD FROM THE BOTTOM UP

Skip these and you'll be fixing the agent instead of the work.

4 Match the fix to the friction.

THE FRICTION	WHAT AN AGENT CAN DO
Rebuilding the same report every week	Pulls the numbers, flags changes, sends it Monday morning
Chasing the same people for updates	Checks what's overdue, nudges the owner, logs the reply
Scrambling when a renewal hits	Starts 60 days out: opens the task, drafts the email
Asking "the one person who knows," again	Runs the documented process the same way every time

Start here → **the one that costs you the most time.**

5 Every agent needs five answers before you build it.

STEP 1	STEP 2	STEP 3	STEP 4	STEP 5
Trigger	**Actions**	**Verification**	**Results**	**Learning**
What starts it? A date, an email, a form, a schedule	**What does it do?** The work, in the systems it touches	**Where does a person approve?** Before anything goes out or gets paid	**What does "working" look like?** Finished, logged, right person knows	**What does it keep?** Your corrections become its rules

↺ **The loop:** every correction you make today is a rule it follows tomorrow.

6 Marketing runs on ten parts.

01 Value proposition	02 Ideal client	03 Personas	04 Offers	05 Client journey
06 Messaging + creative	07 Organic + paid	08 Intent tracking	09 Data capture	10 Retargeting

Get 1–5 clear first. More posts can't fix a fuzzy message.

✓ Try it this week

1. **List** the tasks you or your team repeat every week.
2. **Do the math:** minutes × times a week × 50.
3. **Pick the costliest** and check its foundation.
4. **Answer the five questions** before you build anything.

With gratitude to **Nick Anderson**, **J.R. Covey** *and the* **OneAccord** *team for a day of practical, generous teaching.*

"AI won't replace the relationship. Used well, it gives us more time for it."

— PAUL ADAMS, SOUND FINANCIAL GROUP

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Frameworks presented by OneAccord at their Nov 9, 2026 AI workshop; summarized by Paul Adams. Educational only.