KINGSTONE SYSTEMS 2026 EDITION

KINGSTONE SYSTEMS

The AI Client Roadmap

A practical path from choosing an offer to delivering a system clients will pay for.

Find the first **Not yet**. Produce the evidence. Take the next step.

CHOOSE → BUILD → SEND → SELL → DELIVER

Kingstone Systems · academy.kingstonesystems.com/roadmap

START HERE

One complete path. Your first Not yet decides where you begin.

This roadmap is the same for every reader because the operating sequence does not change. Your starting point does. A beginner may need to choose a buyer. An experienced operator may need to repair scope or delivery. Use evidence, not confidence, to decide.

1
Diagnose
Assess the eight Client Checks on page 4 in order. Stop at the first *Not yet*.

→

2
Produce
Open the assigned page and create the deliverable the check requires.

→

3
Advance
Use the *Ready when* standard. If evidence is missing, keep working that check.

Evidence, not activity

- Watching niche videos is not a chosen buyer.
- Building a generic bot is not relevant proof.
- Sending messages is not a qualified conversation.
- A verbal "sounds good" is not an accepted scope.
- A live link is not a safely delivered system.

CALLOUT
You may skip a stage only when you can show its required evidence.

NEXT: See the whole system on page 3, then score yourself on page 4.

THE COMPLETE SYSTEM

Eight Client Checks turn an idea into an accepted client system.

Every check answers one question the next check depends on. When a downstream step stalls, inspect the evidence immediately before it.

STAGE	CLIENT CHECK	THE QUESTION	REQUIRED DELIVERABLE
CHOOSE	1. Buyer	Who can you reach?	A named buyer type + 20 reachable businesses
CHOOSE	2. Problem	What costly moment do they recognize?	A trigger → consequence → owner statement
CHOOSE	3. Offer	What bounded result can they evaluate?	A one-sentence offer + first engagement
BUILD	4. Proof	What can they inspect before buying?	One accurate, tested proof asset + disclosure
SEND	5. Prospect	Who fits, and why now?	A qualified list with one reason per prospect
SEND	6. Conversation	What did the market actually say?	Replies, questions, calls, objections, next steps
SELL	7. Scope	What exactly will both sides agree to?	Written scope, acceptance, ownership, timeline, price
DELIVER	8. Delivery	Does the system work safely for real?	Tested system, sign-off, monitoring, proof record

Dependency rule. If a check is Not yet, repair the nearest upstream assumption, not more volume, more features, or more pressure. CHOOSE produces a sellable decision. BUILD produces inspectable proof. SEND produces market evidence. SELL produces mutual commitment. DELIVER produces an accepted result.

SELF-ASSESSMENT

Find the first claim you cannot prove.

Work from Check 1 downward. Mark **Proven** only when the evidence exists. Your starting point is the first **Not yet**. A later "yes" does not cancel an earlier "not yet." A polished demo cannot rescue an offer nobody understands.

#	CLIENT CHECK	PROVEN MEANS	NOT YET MEANS	STATUS	START
1	Buyer	Continue to Problem	Begin CHOOSE at Buyer	☐ Proven ☐ Not yet	p.5
2	Problem	Continue to Offer	Begin CHOOSE at Problem	☐ Proven ☐ Not yet	p.5
3	Offer	Continue to Proof	Begin CHOOSE at Offer	☐ Proven ☐ Not yet	p.6
4	Proof	Continue to Prospect	Begin BUILD	☐ Proven ☐ Not yet	p.7
5	Prospect	Continue to Conversation	Begin SEND at Prospect	☐ Proven ☐ Not yet	p.8
6	Conversation	Continue to Scope	Begin SEND at Conversation	☐ Proven ☐ Not yet	p.9
7	Scope	Continue to Delivery	Begin SELL	☐ Proven ☐ Not yet	p.10
8	Delivery	Document and repeat	Begin DELIVER	☐ Proven ☐ Not yet	p.12

FIRST NOT YET = WHERE YOU START

If every answer is Yes: begin on page 14. Document the result, identify the weakest evidence in the completed cycle, and prepare the next one.

MY FIRST NOT YET

START PAGE

STAGE 1 · CHOOSE BUYER PROBLEM

Choose a buyer you can reach and a problem they already feel.

Objective. Select one specific buyer and one recurring operating failure worth examining. **Why it matters:** if the buyer is broad, research stays generic; if the problem is merely interesting, the offer depends on educating the prospect into caring.

> *How buyers find local businesses is shifting fast: consumer use of AI tools for local business recommendations jumped from* **6% to 45%** *in a single year.*
>
> BrightLocal, Local Consumer Review Survey 2026

What to do

1. **Name the operator, not the industry.** Weak: "home services." Stronger: "owner-led water restoration franchises with after-hours intake."
2. **Confirm reachability.** Identify the decision-maker, one channel, and 20+ real businesses that fit.
3. **Find the failure moment.** What happens, when, what the team must do next, what consequence follows.
4. **Use buyer language.** The missed call, slow reply, scheduling delay, not the model or automation stack.

BUYER-PROBLEM DECISION CANVAS: COMPLETE ONE ROW PER CANDIDATE

CANDIDATE	SPECIFIC BUYER	20+ REACHABLE?	FAILURE MOMENT	EVIDENCE FOUND
A		Y / N		
B		Y / N		

WEAK VS. STRONG

Weak: "I help small businesses use AI to save time and make more money." **Strong:** "I help owner-led water restoration teams organize after-hours inspection requests when urgent calls would otherwise reach voicemail." *Source-grounded:* Kingstone's published water-restoration deployment gathers inspection-request information and confirms appointments. Assessment and dispatch stay with the team.

COMMON FAILURE MODES

- Choosing "any local business" because a tool could technically serve many markets.
- Treating access to an industry as proof of demand.
- Using invented revenue-loss numbers to make the problem look expensive.

YOUR MOVE	READY WHEN	THEN
List three candidates, score them, and commit to one buyer–problem pair.	A stranger can identify the same business type, failure moment, and owner, and you can show 20 real businesses that fit.	You can define a bounded offer instead of pitching "AI automation."

STAGE 1 · CHOOSE OFFER

Make the first offer small enough to evaluate, and real enough to matter.

Objective. Define what happens, for whom, under which trigger, with what observable result, and where human responsibility begins. "AI automation" is a category, not an offer. A vague promise forces the buyer to imagine the workflow, the risk, and the finish line.

OFFER FORMULA

For **[operator]**, we implement **[bounded workflow]** when **[trigger]** occurs, so **[observable result]** happens, with **[human decision boundary]** and success checked by **[acceptance test]**.

FIRST ENGAGEMENT	WHEN IT FITS	DO NOT IMPLY
Paid diagnostic	Dependencies, ownership, or data are unknown	A production system
Pilot	One bounded behavior needs evidence	Full deployment or universal reliability
Full build	Process, dependencies, and acceptance are known	Unlimited changes or unpriced operations

WORKED EXAMPLE

For an owner-led water restoration location: an after-hours intake workflow that gathers contact and property details, organizes an inspection request, and confirms a valid slot. Assessment, dispatch, and emergency judgment stay with the team. **Not included:** damage assessment, guaranteed bookings, or unsupported integrations.

COMMON FAILURE MODES

- Leading with features or tool names instead of the workflow.
- Promising "more revenue" without a measurable causal boundary.
- Quoting a full build while core integrations or ownership remain unknown.

YOUR MOVE	READY WHEN	THEN
Write the offer in one sentence, add three exclusions, choose diagnostic, pilot, or full build.	A qualified buyer can repeat what happens, what doesn't, how success is checked, and what they'd buy first.	You can build proof around one promise instead of an oversized product.

STAGE 2 · BUILD PROOF

Build one proof asset that makes the promise inspectable.

Objective. Show one real business how the bounded workflow could behave, using accurate, approved public facts. "I can build this" is a claim. A focused proof asset lets the prospect inspect your research and judgment before trusting you with production.

Choose one customer moment and one surface that makes the offer easiest to inspect: voice, chat, missed-call text-back, a workflow simulation, or a labeled process prototype. Do not build an entire product before validation.

PROOF ESTABLISHES

You understand the business; the behavior is coherent; the system stays inside an explicit boundary; next production questions are visible.

PROOF DOES NOT ESTABLISH

Production reliability, live integration access, compliance approval, verified client outcomes, or performance under real volume.

PROOF PLANNING

REAL BUSINESS, SOURCE URL & CUSTOMER MOMENT

SELECTED SURFACE & VERIFIED FACTS IT MAY USE

3 NORMAL + 2 BOUNDARY/FAILURE TEST CASES

DISCLOSURE: SHOW WITH EVERY PROOF ASSET

This is a demonstration of the proposed experience, not a live client deployment. Production accounts, data, integrations, approvals, monitoring, and support would be validated and scoped separately.

YOUR MOVE	READY WHEN	THEN
Choose one real business, complete the worksheet, build the smallest inspectable proof, run every test.	A real business can inspect the promised behavior, see the limits, and complete the intended test without your explanation.	You have something relevant to place in front of qualified prospects.

STAGE 3 · SEND PROSPECT

Find businesses that fit the offer, and record why each one fits now.

Objective. Create a usable prospect list connecting visible evidence to your buyer, problem, and offer. High outreach volume cannot correct a list filled with poor fits. Research gives the first message a reason to exist.

QUALIFICATION LEDGER: CAPTURE PER BUSINESS

BUSINESS	DECISION-MAKER	VERIFIED OBSERVATION	PROOF ANGLE	STATUS

OBSERVATION QUALITY TEST

Weak: "I noticed you could use AI to automate customer service." **Better:** "Your site routes urgent water-damage calls to the same number after hours. I mapped a simple intake experience that gathers property details before your team calls back."

ONE-CHANNEL RULE

Choose one primary channel for a defined operating cycle: email, LinkedIn, Instagram, phone/local, or warm introductions. Consistency makes the feedback interpretable.

YOUR MOVE	READY WHEN	THEN
Build the first 20 qualified rows. Stop researching once you can write one honest observation.	Another operator could inspect your list and explain why each business belongs on it.	Your message can begin with relevance instead of a generic pitch.

STAGE 3 · SEND CONVERSATION

Start a relevant conversation. Do not force the sale into the first message.

Objective. Earn a reply, permission to share proof, a substantive question, or a short conversation. Prospects need a credible reason for the message, a relevant idea, and an easy way to respond.

The anatomy of a first message

1. **A credible observation.** Something true and specific about their business, not a generic compliment.
2. **The customer moment it points to.** Name the exact moment the failure happens, so the message reads as researched, not templated.
3. **A light hypothesis, not a claim.** Frame the problem as something you're checking, not something you're asserting.
4. **One easy way to respond.** A yes/no question or "worth a look?" beats an open-ended ask.

ABBREVIATED EXAMPLE SUBJECT: QUICK IDEA FOR [BUSINESS]

```
Hi [Name], I noticed [specific observation]. Does [problem hypothesis] create extra follow-up for your team? Worth a look?
```

This is the shape of the message, not the finished library. The paid **Outreach Templates** has complete channel-specific messages for email, LinkedIn, Instagram, and phone, the demo-handoff and follow-up-by-state templates, objection replies, and the compliance boundary for each channel.

REPLY ROUTING

REPLY	RESPONSE
Interested	Ask one current-state question; propose a short discovery call.
Not now / Silence	Send the follow-up that matches their state, then a breakup message after 3-4 unanswered touches. No fake urgency.
No	Thank them and stop. Do not argue with a rejection.

> *A first message rarely does the work alone. In an analysis of 12 million outreach emails, the average reply rate was only* ***8.5%****, and following up more than once produced roughly* ***2x*** *the replies of a single send.*
>
> Backlinko / Pitchbox, 12 Million Cold Outreach Emails study

YOUR MOVE	READY WHEN	THEN
Send the first researched messages and schedule follow-ups before changing the offer.	At least one qualified prospect has replied substantively, viewed the proof, or agreed to talk, and you know where every thread stands.	You can diagnose the real workflow and scope an appropriate engagement.

STAGE 4 · SELL SCOPE · DISCOVERY

Diagnose the workflow before you prescribe the build.

Objective. Trace one real workflow, locate where it breaks, establish the consequence, and confirm what changing it requires, then agree on a next step. Interest in a demo is not agreement on the production problem.

1
Understand the workflow
"Walk me through what happens today, from the moment [trigger] occurs, using one recent example."

2
Locate the break
"Where does that actually go wrong, and how often does it happen in a normal week?"

3
Establish the consequence
"What does that cost you, and what would a successful first change look like?"

4
Confirm the conditions for change
"Who owns this, which accounts and systems are involved, and is it worth solving now?"

5
Agree on the decision
"Given what we've covered, is the right next step a yes, a no, or one thing to validate first?"

RISK-REDUCTION LANGUAGE

```
"Based on what we know, I can outline the likely path. Before I promise the integration, I need to validate [account/API/permission]. If that remains unknown, the responsible first step is a diagnostic, not pretending the uncertainty is fixed scope."
```

This five-part map is the shape of a discovery call, not a question count to hit. Depth matters more than reaching a number. The paid **Sales & Closing Templates** provides detailed prompts and transitions for working through it, guidance on presenting the demo, and the decision matrix for which engagement to recommend (paid diagnostic, pilot, or full implementation).

COMMON FAILURE MODES

- Demoing for most of the call and learning almost nothing.
- Naming a price before confirming what changing this actually requires.
- Mistaking enthusiasm for the authority to approve the project.

YOUR MOVE	READY WHEN	THEN
Use the five-part map on the next qualified call. Do not present price until scope can be written.	Both sides can describe the same workflow, its break and consequence, and what changing it would require.	You can create a scope that reduces risk for both parties.

STAGE 4 · SELL SCOPE

Write the agreement so surprises become visible before the build.

Objective. Translate discovery into a bounded engagement both parties can evaluate and accept. Clarity is risk reduction. A clean no is better than a vague yes.

YOUR SCOPE MUST COVER

- [ ] Objective, included workflow, and explicit exclusions
- [ ] Integrations: permissions, sandbox/production proof, failure behavior
- [ ] Acceptance tests: normal, missing-info, sensitive, failure, escalation
- [ ] Ownership: accounts, billing, credentials, data, exit
- [ ] Timeline, price and payment, change process, and support after acceptance

This is the checklist, not the finished paperwork. The paid **Sales & Closing Templates** has the complete proposal, pricing, objection-handling, agreement, onboarding, and go-live handoff assets.

INTEGRATION STOPLIGHT

Green verified · **Yellow** unverified, price as assumption · **Red** blocked or too risky.

PRICING PRINCIPLE

Price the responsibility you're accepting, not the perceived magic of "AI." Separate build, vendor costs, and support.

BUILD A PRICE FROM THE AGREED SCOPE

COMPONENT	HOW TO ESTIMATE	WHAT IT COVERS
One-time setup	**Scoped build effort**	Configuration, business-detail loading, acceptance testing, and handoff.
Monthly retainer	**Usage + operating work**	Software and telephony usage, monitoring, and detail updates as services change.

CHECK THE ACTUAL COSTS

Estimate provider costs from expected call minutes, messages, model usage and hosting. Add the monitoring and update work you agree to own. Confirm those assumptions before quoting.

VERIFY BEFORE COMMITTING

Integration-heavy or compliance-bound work needs an integration assessment before a quote. This worksheet is a pricing method, not a Kingstone price list or a promise of margin.

DECISION QUESTION

"Does this describe the problem you want solved and the boundary you're prepared to approve?"

WHERE OPERATORS USUALLY GET STUCK HERE

Knowing when discovery is complete, turning it into a price and written boundary, and getting feedback before a scope mistake compounds are where self-taught progress usually slows down. **Client Accelerator** adds live coaching to review your scope and pricing before you send it. Client Accelerator also includes: Private member resources and coaching inside Kingstone AI Operators. See View Client Accelerator.

YOUR MOVE	READY WHEN	THEN
Draft the one-page scope, review it live, correct misunderstandings, ask for a clear decision.	Buyer and seller have agreed in writing on objective, boundary, dependencies, tests, timeline, and price.	Delivery can begin from a shared definition of done.

STAGE 5 · DELIVER IMPLEMENTATION

Move from demo logic to a production system the client can operate.

Objective. Implement the accepted scope using real accounts, approved data, controlled access, explicit human handoffs, and visible milestones. A demo is ready when it supports a sales conversation; production is ready only when it can encounter real conditions, including failure.

MILESTONE	WHAT'S CONFIRMED
M0 Scope accepted	Commercial terms, dependencies, tests, owners
M1 Access verified	Accounts, permissions, source data, sandbox path
M2 Controlled build	Normal workflow against approved knowledge
M3 Boundary testing	Missing data, sensitive requests, provider failures
M4 Client review	Named users inspect behavior; corrections via change control
M5 Controlled launch	Rollback, monitoring, human coverage active
M6 Initial operating review	Logs, failures, handoffs reviewed after real use

OWNERSHIP DEFAULT

Where providers support it, the clean production default is **client ownership with scoped operator access**. Make exceptions explicit and track account owner, billing, credentials, and exit action.

YOUR MOVE	READY WHEN	THEN
Run kickoff from the accepted scope. Don't begin production work until owners and inputs are visible.	The implementation reaches controlled launch with access, tests, handoffs, monitoring, and rollback documented.	The client can evaluate the real system against the agreed definition of done.

STAGE 5 · DELIVER ACCEPTANCE

Prove the system works inside its boundaries, then document what is true.

Objective. Earn client acceptance, establish the operating review, and turn verified delivery evidence into responsible proof. Without written acceptance, "done" keeps moving.

- [ ] Normal-path tests pass with retained evidence; ambiguous/sensitive requests escalate correctly
- [ ] Named people know where escalations arrive and how to pause
- [ ] Rollback and initial observation window are active
- [ ] Client acceptance signer approves or lists remaining conditions

RESULTS DOCUMENTATION LADDER: USE THE STRONGEST LABEL THE EVIDENCE SUPPORTS, NEVER A STRONGER ONE

1. Demonstration → 2. Process proof → 3. Implementation evidence → 4. Verified operational result (with source, period, permission) → 5. Client statement (attributed or anonymized with permission)

ACCEPTANCE NOTE

This checklist is not a legal, security, privacy, or compliance certification. Regulated-data requirements must be approved by the client's responsible owner.

YOUR MOVE	READY WHEN	THEN
Run the acceptance review, secure written sign-off, schedule the operating review.	The system passed agreed tests, the client accepted it, and every published claim is supported and permissioned.	You can repeat the operating cycle with stronger proof and a more credible offer.

FIRST OPERATING CYCLE

Your next 30 days: produce evidence, not busywork.

This is a first work cycle, not a revenue guarantee. If your scorecard starts later, use the same 30 days to strengthen that check and the ones after it.

> *The market for what you're building moved fast:* **77%** *of U.S. small and midsize businesses now use AI regularly, up from* **48%** *just eighteen months earlier.*
>
> Intuit QuickBooks, 2026 AI Impact Report

WEEK	OUTCOME	MEASURED OUTPUT
1 · CHOOSE	One reachable buyer, one recognized problem, one bounded offer	Buyer–Problem–Offer canvas, one offer sentence, one commercial step
2 · BUILD	One focused, tested, honestly labeled proof asset	Shareable proof asset, test record, disclosure
3 · SEND + LEARN	Qualified businesses see relevant proof; the market answers	20 qualified rows, messages sent, conversation ledger
4 · SELL, SCOPE + IMPROVE	Qualified interest moves into discovery and a written next step	Discovery notes, scope drafts, weekly review

DAILY MINIMUM (5 DAYS/WEEK)

Research 3 qualified prospects · send 3 relevant first messages or follow-ups · log every reply · improve one asset only when evidence justifies it · 15 minutes updating the ledger.

CALLOUT

Do not change the buyer, problem, offer, proof, and channel at once. You will lose the ability to learn what caused the result.

THE ROADMAP IS COMPLETE. THE WORK STARTS AT YOUR FIRST FAILED GATE.

You now have the path. Choose the level of support you want around the work.

Choose a reachable buyer and problem. Build honest proof. Send it to qualified prospects. Diagnose, scope, and deliver against written tests. Document the result, and repeat.

You do not need to buy anything to use this roadmap. Return to page 4, find the first Not yet, and produce the required evidence.

FREE KINGSTONE COMMUNITY

Learn with other operators working toward client #1.

Kingstone AI Operators is free to join. Applications are reviewed on a rolling basis. Learn alongside other operators as you implement this roadmap.

Best for: self-directed builders who want community and education before the full program.

Join Kingstone AI Operators free

Client Accelerator members receive instant access to private member resources and coaching inside Kingstone AI Operators.

90-DAY EXECUTION ENVIRONMENT

Software, live guidance, templates, and accountability around the roadmap.

Client Accelerator is Kingstone's 90-day program for people starting an AI-service business: 90 days of Ciela Core, The 90-Day AI Client System, two live group coaching calls a week, private member resources and coaching inside Kingstone AI Operators, and outreach, sales, and demo/offer templates.

Best for: operators who want faster feedback on offer, demos, outreach, sales, and delivery while doing the work.

Not a done-for-you lead service. Kingstone build partnerships are reviewed and priced separately, not automatically included.

See Client Accelerator

Continue independently → return to page 4. Start with the first check marked Not yet.