Teamulate

A PRACTICAL GUIDE FROM TEAMULATE

The First AI Workflow Cost Sheet

What does a first AI implementation really cost, all in?

A practical guide from Teamulate. Price one AI workflow across its whole life, from setup and data clean-up to review, upkeep and exit, check list prices on the vendor's own page with the date, and count saved time as money only when it goes to paid work.

Eight cost lines

Setup | Clean-up | Licence | Usage | Review | Training | Upkeep | Exit

Who this is for

Owners and marketing or operations leads at small and mid-size B2B firms weighing their first AI workflow, such as answering inquiries, updating the CRM or answering questions from company documents.

You need the workflow you have in mind, a rough monthly volume, the hourly cost of the people involved, and the vendor pricing pages.

The idea in one paragraph

> The subscription is the easiest line to see and only one of eight. Setup, data clean-up, usage, human review, training, upkeep and the cost of leaving all sit around it, and six of the eight have no public price. Price the whole life of one workflow, keep vendor prices with their source and date, mark unmeasured hours as unknown, and treat freed time as a saving only when someone actually spends it on paid work.

PART 1

What Canadian businesses report about AI

Fact	Value	Source
1 **Businesses that used AI to produce goods or deliver services in the prior 12 months, second quarter of 2026**	19.2%, up from 6.1% in the second quarter of 2024	Statistics Canada, June 11, 2026
2 **Businesses saying the use of AI is not relevant to the business, second quarter of 2026**	40.0%	Statistics Canada, June 11, 2026
3 **Of businesses using AI, those that made changes in training or staffing practices due to AI use**	44.4%; 32.0% reported AI-related training for existing employees	Statistics Canada, June 11, 2026
4 **What limits the use of AI, second quarter of 2026**	Cybersecurity or privacy concerns 13.4%; cost 10.6%, the second most common answer	Statistics Canada, June 11, 2026
5 **Businesses planning to use AI in the next 12 months, third quarter of 2026**	25.2%, up from 14.5% in the third quarter of 2025	Statistics Canada, October 1, 2026

Read these carefully. They are shares of businesses that answered a survey. Cost is a real but minority reason, behind cybersecurity or privacy concerns, and training already shows up as a change among businesses using AI. That makes the cost question worth answering properly before you decide.

PART 2

Eight cost lines, and which ones have a public price

Cost line	What it covers	Public price?
1 **Setup**	Designing and building the workflow, inside or with outside help	No: your hours times your rate
2 **Data clean-up**	Fixing fields, duplicates, owners and outdated documents first	No: measure it
3 **Plan or licence**	Seats or plan tiers for the tools involved	Yes, on the vendor page
4 **Usage**	Tasks, outcomes, credits or other metered units	Yes, the unit price; your volume decides the total
5 **Human review**	The minutes a person spends checking each result	No: measure it
6 **Training**	Time for the team to learn the new way of working	No: measure it
7 **Upkeep**	Fixing broken steps, field changes, document changes, re-checks	No: measure it
8 **Exit**	Exporting data and rebuilding elsewhere if you stop	No: estimate it before you start

- A vendor price list covers lines 3 and 4. Lines 1, 2 and 5 to 8 depend on your business; fill those in once you have measured them.
- Write down each vendor price with the page, the date you checked it and the billing terms. Prices change.
- Do not convert currencies silently. If you pay in Canadian dollars, use the amount the vendor shows at checkout or on your invoice.

PART 3

Published list prices, checked November 4, 2026

These are list prices on the vendors' own pages on the date checked, in US dollars. They are examples of how AI tools charge, not recommendations, and they will change.

Vendor and line	Published list price	Source
1 **Zapier Professional, 750 tasks a month**	USD 19.99 a month billed annually, USD 29.99 billed monthly	Zapier pricing
2 **Zapier Professional, 2,000 tasks a month**	USD 49.00 a month billed annually, USD 73.50 billed monthly	Zapier pricing
3 **Zapier Team, 2,000 tasks a month**	USD 69.00 a month billed annually, USD 103.50 billed monthly	Zapier pricing
4 **Intercom helpdesk seats, annual billing**	Essential USD 29 a seat a month (USD 19 for new customers), Advanced USD 85, Expert USD 132	Intercom pricing
5 **Intercom Fin AI Agent**	USD 0.99 per outcome, at most one outcome per conversation; USD 9.99 per qualification	Intercom pricing and help center

How usage is counted matters as much as the price.

- Zapier: the task allowance resets monthly, even on an annual plan. Triggers and Zapier's built-in data tools do not use tasks. Above the limit, extra tasks cost 1.25 times the base rate on annual plans and 2.5 times on monthly plans, and workflows pause at 3 times the plan's task limit. On a 750-task plan that ceiling is 2,250 tasks.
- Intercom: Fin is charged per outcome, such as a resolution where no further help is requested after the last AI answer, or a procedure that ends in a handoff to a person.
- OpenAI: ChatGPT Business is priced per user per month, with monthly or annual billing, and starts at 2 users. Read the seat price on OpenAI's pricing page on the day you decide.
- Microsoft: the Microsoft 365 Copilot Business add-on is available only to existing customers with an eligible Microsoft 365 Business plan, so that plan is part of the cost. Microsoft says some advanced AI features are billed by usage, beyond the licence fee.

PART 4

The cost model, as formulas

90-day cost = setup hours x rate + data clean-up hours x rate + 3 x monthly plan cost + usage (items x units per item x unit price) + review minutes per item x items / 60 x rate + training hours x rate.

First-year cost = 90-day cost + 9 x monthly plan cost + 9 x monthly usage + upkeep hours per month x 9 x rate, plus an exit estimate.

Payback check = (minutes per item before, minus minutes per item after including review) x items x rate / 60, compared with the first-year cost.

- Only measured minutes count. An estimate of time saved is not a measurement.
- Freed time becomes money only if it is spent on paid work or replaces a cost you really stop paying.
- Use one rate per person or role, and state whether it is a salary cost or an outside rate.

PART 5

Worked arithmetic on list prices only

Worked examples on published list prices. These lines use the prices in Part 3 and invented volumes, to show how the lines add up.

Line	Calculation	Result
1 **Zapier Professional, 750 tasks, annual billing, one year**	12 x USD 19.99	USD 239.88
2 **Intercom Essential, 2 seats, annual billing, one month**	2 x USD 29	USD 58 a month
3 **Fin outcomes, if 300 conversations a month each end in one outcome**	300 x USD 0.99	USD 297 a month

- Line 3 shows why volume matters: at this unit price, usage can cost more than the seats.
- None of these lines includes setup, clean-up, review, training, upkeep or exit. No price list shows those lines, so they are yours to measure.

PART 6

Scenario worksheet

Fill one column per workflow. Fill each hour field after you measure it.

Line	A: inquiry handling	B: CRM updates	C: answers from documents
Plan or licence	Automation plan	Automation plan, plus the CRM plan you already have	Assistant seats, or helpdesk seats plus outcomes
What drives usage	Inquiries a month x steps	Records changed x steps	Conversations that end in an outcome
Setup hours	Unknown	Unknown	Unknown
Data clean-up	Form fields, owners	Duplicates, required fields	Versions, scope, validity of documents
Human review	Every reply that promises a price or a date	Every field the AI suggests	Every important answer, at first
Upkeep	Broken steps, replays	Field changes	Document changes, re-checking answers
Exit	Export the workflows	The CRM stays the record	Documents stay in your own system

PART 7

When a first workflow does not pay back

- **Low volume.** If only a few items a month go through, setup and upkeep outweigh any minutes saved.
- **High review time.** If a person must check every result closely, the minutes per item barely fall.
- **Unclean data.** If fields, owners or documents are wrong, the clean-up comes first and the workflow repeats the errors faster.
- **Freed time with nowhere to go.** Hours saved are not money saved unless they move to paid work.
- **A price that changes.** Promotional and first-year prices end. Price the second year at list price.

PART 8

Checklist before you sign up

- [ ] All eight cost lines are written down, with unknowns marked.
- [ ] Every vendor price has its page, date and billing terms.
- [ ] Usage is priced on a realistic volume, including the overage rule.
- [ ] Review minutes per item are measured on a small sample.
- [ ] The first-year cost uses list prices, not first-year offers.
- [ ] Freed time has a named place to go, or it is not counted as a saving.
- [ ] You know how to export your data and stop.

Limits of this guide

- The prices are list prices on the vendors' pages on November 4, 2026, not quotes, and they will change.
- The worked arithmetic uses published list prices from November 4, 2026, and invented volumes, shown in the text.
- Nothing here promises a saving or a payback period.

Want a second pair of eyes?

If you would rather not price a first workflow alone, Teamulate helps B2B teams scope and run AI workflows with every step and cost line visible, as part of the marketing operations our AI marketing team runs with you. Request a demo at https://teamulate.ca/request-demo/

Sources

Checked November 4, 2026:

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