

SAMPLE FINAL REPORT - ANONYMISED

Automation Opportunity Assessment

Evidence-backed operating model review and roadmap

Prepared for

Mid-sized B2B services firm (fictionalised)

Assessment focus

Workflow leakage, automation readiness, governance

Report date

June 2026 sample

Classification

Public sample - no client data

\$311k

Indicative annual trapped capacity

68%

Manual effort reduction potential

92%

Evidence confidence on priority findings

90 days

Phase 1 payback window

01 / EXECUTIVE SNAPSHOT

What management needs to know

This anonymised sample illustrates the final report format a ProcessScout client would receive after an evidence-backed review of operating workflows, system handoffs, data quality and automation readiness. The example company is a mid-sized B2B services firm with 82 employees, five core operating teams and a high volume of manual client onboarding, reporting and finance administration.

Headline conclusion: the business is not short of AI ideas; it is short of validated operating evidence. The clearest value comes from removing duplicate data entry, standardising intake, automating status chasing and creating a governed reporting layer before deploying more advanced AI agents.



The report identifies eight priority improvement opportunities. Three are immediate quick wins, two require executive ownership because they cut across departments, and three should be deferred until process ownership and data definitions are stable.

#	Recommendation	Why it matters	Decision required
1	Create a single client intake record and remove duplicate re-keying	Highest-confidence waste source: repeated entry across CRM, project tracker and finance sheet	Approve 30-day quick-win sprint
2	Automate status chasing and handoff reminders	Reduces client delay, improves throughput and creates traceable accountability	Assign operations owner
3	Standardise reporting pack and source-of-truth data definitions	Prevents management debate over numbers and unlocks safe AI summarisation	Confirm KPI definitions
4	Consolidate shadow spreadsheets and document stores	Improves control, reduces error, prepares for future workflow automation	Approve migration principles

02 / REPORT PURPOSE

Purpose and scope

This report is designed to help the leadership team decide where to act first. It translates operational evidence into a prioritised view of workflow leakage, automation readiness, control risk and practical next steps.

The analysis focuses on work as it is actually performed: the systems used, the handoffs between teams, the manual workarounds, the exception paths and the data quality issues that constrain safe automation.

Each recommendation is presented with a business rationale, evidence basis, confidence level, implementation complexity and decision gate. The intent is to support action without encouraging over-build or premature AI deployment.

Report audience: owner, CEO, COO, CFO, operating partner, transformation lead, advisor or project sponsor.

Report output: a ranked roadmap of validated automation and process improvement opportunities, supported by evidence cards, quantified impact and implementation gates.

In scope	Reason for inclusion
Client intake, onboarding, reporting, finance handoffs and document control	These workflows carry high manual effort, cross-functional handoffs and measurable risk.
Source-data quality, duplicate records and KPI definitions	Automation depends on trustworthy inputs and consistent management definitions.
Quick-win automation candidates and 30/60/90-day roadmap	The leadership team needs a sequenced plan, not a list of disconnected ideas.
Governance, access control and human approval points	AI-assisted workflows should be introduced only where accountability is clear.

03 / EVIDENCE BASE

Sources reviewed and confidence basis

The sample assessment reviewed a representative set of documents, exports, walkthrough notes and stakeholder inputs. The evidence base is intentionally practical: the goal is to understand how work actually moves, not how the process is supposed to work in a policy document.

Evidence category	Sample sources reviewed	Use in analysis
Workflow documents	Client onboarding checklist, renewal process notes, weekly reporting SOP	Baseline process design and control intent
System exports	CRM opportunity export, ticketing queue extract, finance ageing report, project tracker CSV	Observed volumes, status changes, duplicates and aging
Stakeholder input	Operations manager, finance lead, customer success lead, sales operations, founder sponsor	Root-cause interpretation and exception handling
Screenshots / walkthroughs	Screen recordings of intake, handoff, reporting and invoice-chasing steps	Actual click paths, re-keying, delays and missing fields
Policy / controls	Data access list, approval matrix, retention rules, vendor list	Governance, risk and automation constraints

Confidence model: High confidence indicates that a finding is supported by multiple source types or a statistically useful sample. Medium confidence indicates the issue is well supported but requires validation before implementation. Low confidence indicates a hypothesis that should not yet drive spend.

Sample basis: 41 documents and exports, 6 stakeholder inputs, 3 walkthroughs, 1,842 workflow records and 312 sampled client records. Priority findings are supported by 86-96% confidence in this illustrative sample.

04 / CURRENT STATE

Operating model map

The business has grown through pragmatic fixes: spreadsheets, manual updates, shared inboxes and partial automation. This has kept the company moving but created dependency on individuals, duplicate records and unclear ownership of cross-functional handoffs.

Workflow stage	Current pattern observed	Main friction	Evidence confidence
Lead intake	Website form, email, CRM entry and manual qualification notes	Duplicate entry and inconsistent lead source attribution	94%
Client onboarding	Operations creates project workspace after sales handoff	Missing fields delay kickoff; exceptions handled by memory	91%
Delivery coordination	Project tracker plus Slack / email updates	Status unclear; reminders rely on individual follow-up	88%
Reporting	Weekly spreadsheet pack assembled from three systems	Manual reconciliation creates delays and number disputes	96%
Finance admin	Invoice status tracked in finance system and operations sheet	Chasing and approval status not visible to account owners	90%

The pattern is common in successful SMEs: the work is not broken enough to stop the business, but it is fragile enough to slow growth. Automation should therefore start with evidence-backed process control, not isolated AI tools.

05 / OPERATING HEALTH

Evidence-scored pillar analysis

Each pillar is scored from 0 to 100 based on observed evidence. Scores below 50 indicate material workflow risk; scores below 35 indicate immediate management attention.

Pillar	Score	Evidence reading
Workflow clarity	46/100	Core flow understood by staff but not consistently documented or measured
Data reliability	38/100	Duplicate records and mismatched status fields across CRM, finance and project tracker
Automation readiness	51/100	Several workflows are ready, but input standards must be tightened first
Governance & control	44/100	Access and approval practices exist but are not consistently evidenced
Reporting confidence	35/100	Management reporting depends on manual reconciliation and spreadsheet judgment

Interpretation: the business should not start with a broad AI transformation programme. The first move should be a disciplined operating clean-up: define ownership, remove duplicate entry, stabilise source data and automate narrow workflows with high evidence support.

06 / FINDINGS SUMMARY

Eight validated opportunities

The assessment identified eight opportunities. The table below shows expected value, complexity and confidence. Impact estimates are directional and should be treated as planning inputs, not guaranteed outcomes.

#	Opportunity	Impact	Complexity	Confidence	Recommended timing
1	Single intake record and handoff checklist	\$74k/year capacity release	Low	96%	Days 0-30
2	Automated status chasing and reminders	\$52k/year capacity release	Low-Med	92%	Days 0-30
3	Weekly reporting automation and KPI dictionary	\$86k/year capacity release	Medium	94%	Days 30-60
4	Client onboarding exception triage	\$41k/year capacity release	Medium	89%	Days 30-60
5	Invoice approval visibility and AR handoff	\$28k/year capacity release	Low	90%	Days 0-30
6	Document storage and permissions cleanup	Risk reduction; lower rework	Medium	86%	Days 60-90
7	AI-assisted client summary drafting	Quality and speed improvement	Medium	78%	After data standards
8	Advanced agentic workflow automation	Strategic option	High	62%	Defer until controls mature

07 / EVIDENCE CARDS

What supports the findings

Evidence cards are designed to let a leadership team see the source basis for a recommendation without reading every document. In a full client report, each card links to the underlying evidence pack.

Evidence card	Observed evidence	Finding supported	Confidence
E-014: CRM duplicate status review	312 sampled records; 54 contained conflicting client stage, owner or follow-up status across systems	Single intake record and reporting dictionary	94%
E-021: Reporting walkthrough	Weekly pack required 17 manual copy/paste actions and 6 judgment calls before circulation	Weekly reporting automation	96%
E-028: Finance handoff sample	41 overdue invoice items showed no matching owner-visible status in project tracker	Invoice approval visibility	90%
E-036: Onboarding exception notes	22% of new client projects required missing-information follow-up after kickoff date agreed	Onboarding exception triage	89%

The strongest findings are those where documents, exports and stakeholder inputs agree. Where only one source type supports a conclusion, the report marks the recommendation as a hypothesis and assigns validation before build.

08 / OPPORTUNITY RANKING

Where to act first

A good automation roadmap is not a list of ideas. It is a sequence. The highest-priority actions combine strong evidence, low implementation complexity, high value and low governance risk.

Action class	Opportunity	Reason	Management action
Do now	Single intake record	High value, low complexity, direct source-data improvement	Approve immediate sprint
Do now	AR / invoice status visibility	Low complexity and direct cash-cycle benefit	Assign finance and ops owner
Do next	Reporting automation	High value but requires KPI agreement first	Run KPI definition workshop
Do next	Onboarding exception triage	Requires agreement on mandatory fields and owner rules	Confirm field standard
Prepare	Document permissions cleanup	Risk reduction; not a revenue driver but enables trust	Define access policy
Defer	Advanced AI agent deployment	Insufficient control maturity for autonomous action	Revisit after 90-day controls

Recommendation: start with two quick wins and one control workstream. Do not run five disconnected automation projects. The operating benefit comes from reducing handoff ambiguity and making the data layer reliable enough for later AI assistance.

09 / FINANCIAL IMPACT

Indicative value model

The model estimates trapped capacity, not guaranteed savings. In practice, most SMEs use recovered time to grow without hiring, accelerate client response, improve quality, or reduce overtime rather than immediately reducing headcount.

Impact area	Observed basis	Conservative annual value	Confidence
Duplicate intake and re-keying	Approx. 23 hrs/week across sales ops and delivery handoff	\$74,000	96%
Reporting pack production	Approx. 16 hrs/week plus review and correction loops	\$86,000	94%
Status chasing and reminders	Approx. 14 hrs/week across client success and operations	\$52,000	92%
Finance approval / AR visibility	Approx. 8 hrs/week plus avoidable delay	\$28,000	90%
Onboarding exception handling	Approx. 11 hrs/week in clarification and late-field chasing	\$41,000	89%
Document search and rework	Approx. 6 hrs/week; risk-adjusted value	\$30,000	86%
Total indicative annual value	Capacity-release and rework reduction estimate	\$311,000	91% weighted

Payback logic: Phase 1 is expected to justify itself if it removes only 14-18 hours per week of recurring manual work. The evidence suggests this threshold is achievable from intake, status chasing and finance visibility alone.

10 / DETAILED FINDINGS

Finding group A: intake and handoff leakage

Finding A1 - Duplicate intake records: client, opportunity and project records are created in multiple locations. The same fields are repeatedly typed by sales operations, delivery operations and finance. This creates inconsistent status, delays and difficulty measuring conversion quality.

Dimension	Assessment
Impact	Estimated \$74k annual trapped capacity and high management-reporting friction
Root cause	No single intake record or mandatory field standard at sales-to-delivery handoff
Evidence	CRM export, project tracker sample, stakeholder walkthrough and duplicate status review
Recommended action	Define one intake record, required fields, handoff owner and downstream sync rules
Effort	Low: 2-4 week sprint with operations owner and system administrator
Confidence	96%

Finding A2 - Onboarding exception handling: missing information is discovered after kickoff scheduling. Exceptions are handled by individual follow-up rather than a visible queue, causing uneven client experience and hidden workload.

Impact	Estimated \$41k annual capacity leakage and client experience risk
Root cause	Mandatory fields not enforced before kickoff; no exception triage queue
Recommended action	Create readiness score, missing-field queue and automated stakeholder reminders
Confidence	89%

11 / DETAILED FINDINGS

Finding group B: reporting and finance leakage

Finding B1 - Manual weekly reporting: the reporting process requires manual collection, transformation and interpretation of status from three systems. This creates avoidable delay and reduces trust in management packs.

Dimension	Assessment
Impact	Estimated \$86k annual trapped capacity and higher decision latency
Root cause	KPI definitions and data ownership are informal; reporting pack is assembled manually
Evidence	Reporting walkthrough, spreadsheet version history, stakeholder interview and project tracker export
Recommended action	Define KPI dictionary, data owner and automated reporting pipeline with exception review
Effort	Medium: 30-60 days because definitions must be agreed before automation
Confidence	94%

Finding B2 - Invoice approval visibility: finance status is not visible enough to account owners and delivery leads. This produces chasing, duplicated messages and late escalation.

Impact	Estimated \$28k annual trapped capacity plus possible working-capital benefit
Root cause	Finance system status not reflected in operational tracker or client ownership view
Recommended action	Expose invoice status and next action owner in operational dashboard
Confidence	90%

12 / RISK AND CONTROL VIEW

What must be governed before deeper AI

The company has several AI-appropriate workflows, but deeper automation should wait until the control layer is mature enough. The risk is not that AI cannot help; the risk is automating inconsistent inputs and unclear accountability.

Risk	Current observation	Control recommendation	Priority
Data quality	Duplicate records and conflicting status fields across systems	Create source-of-truth rules and exception reports	High
Access control	Document and workspace permissions inconsistent by team	Define role-based access and quarterly review	Medium
Human accountability	Reminders and approvals rely on informal ownership	Assign named process owners and escalation rules	High
AI output reliability	No standard for what AI may draft vs decide	Use AI for drafts, summaries and triage first; retain human approval	High
Vendor / tool sprawl	Multiple overlapping tools with unclear ownership	Create vendor register and retirement principles	Medium

Governance principle: AI should help staff move faster through known workflows before it is permitted to take autonomous actions. The first 90 days should focus on controls, observability and narrow automation.

13 / ROADMAP

30 / 60 / 90 day implementation path

Period	Primary objective	Key actions	Exit gate
Days 0-30	Stabilise data and remove obvious re-keying	Define single intake record; implement handoff checklist; expose invoice status; create evidence dashboard	Duplicate entry reduced by at least 35%; named owners assigned
Days 31-60	Automate reporting and exception handling	Agree KPI dictionary; automate weekly report draft; build onboarding exception queue; start document cleanup	Weekly report pack generated with human review; exception aging visible
Days 61-90	Prepare for AI-assisted operations	Deploy AI-assisted summaries where source data is reliable; define approval rules; create QA loop; finalise tool retirement plan	AI assistance limited to governed drafts and triage; controls reviewed

The roadmap deliberately avoids a large transformation programme. It is designed as a sequence of controlled sprints with measurable exit gates. If a gate is not met, the next stage should not scale.

14 / OPERATING MODEL

Ownership, roles and cadence

Successful automation requires an operating rhythm, not just tools. The report recommends a simple governance model that keeps decisions close to the people who own the work while giving leadership a clear performance view.

Role	Named responsibility	Cadence
Executive sponsor	Approves priorities, resolves cross-functional conflicts, signs off success gates	Bi-weekly 30-minute review
Operations owner	Owns intake, handoff, exception queue and workflow adoption	Weekly
Finance owner	Owns invoice status, approvals and payment visibility	Weekly
Reporting owner	Owns KPI dictionary, dashboard logic and manual override rules	Weekly during build, monthly thereafter
Systems administrator	Owns configuration, permissions and integration hygiene	Sprint-based

Recommended rhythm: one 45-minute weekly improvement meeting for the first 60 days, using the roadmap, open findings, evidence pack and KPI dashboard as the single agenda.

15 / SUCCESS METRICS

How management should measure progress

The following KPIs convert the assessment into management control. They should be measured before implementation, weekly during the initial sprints and monthly after stabilisation.

Metric	Baseline estimate	Target after 90 days	Why it matters
Duplicate entry count	23 recurring duplicate fields across three systems	Reduce by 70%	Removes avoidable work and improves data trust
Onboarding missing-field rate	22% of projects require post-kickoff clarification	Below 8%	Improves client experience and reduces delays
Weekly report production time	16 hrs/week plus review loop	Below 5 hrs/week	Releases management and operations capacity
Invoice status visibility	Not visible to account owners in operating tracker	95% of live items visible	Reduces chasing and late escalation
Exception aging	Not consistently measured	100% of exceptions aged and owned	Creates accountability
AI-assisted draft accuracy	Not applicable	Human-approved outputs >90% usable	Enables safe use of AI after controls

16 / EVIDENCE INDEX

Selected anonymised references

A full client report includes the detailed evidence pack under the client workspace and any applicable confidentiality terms. This public sample shows the type of references included without exposing private material.

Ref	Evidence item	Finding supported	Status
E-001	CRM opportunity export - anonymised field and stage sample	Duplicate intake records; conversion reporting	Reviewed
E-008	Client onboarding SOP and checklist comparison	Missing-field rate and exception triage	Reviewed
E-014	Duplicate status cross-match, 312 sampled records	Single intake record and reporting dictionary	Reviewed
E-021	Weekly reporting walkthrough notes and screenshots	Reporting automation opportunity	Reviewed
E-028	Finance ageing export and owner-status comparison	Invoice visibility and AR handoff	Reviewed
E-036	Stakeholder notes: operations, finance and customer success	Root-cause interpretation	Reviewed
E-041	Permissions and document store sample	Governance and access controls	Reviewed

Limitations: this sample uses fictionalised but realistic data. In a live client report, values, confidence levels and recommendations would be specific to the supplied evidence and may differ materially from the example.

Recommended decisions before implementation

This final page is written for the leadership team. It summarises the decisions required to turn the assessment into action without over-scoping the first phase.

Decision	Recommended choice	Rationale
Start point	Begin with intake record, handoff checklist and invoice visibility	Highest-confidence opportunities with low implementation risk
Governance model	Assign one executive sponsor and three process owners	Prevents automation becoming an IT-only exercise
AI scope	Use AI for draft summaries and triage only after data standards are stable	Protects quality and client trust
Roadmap pacing	Use 30-day gates; do not scale if evidence or adoption is weak	Keeps implementation disciplined and measurable
Success measure	Track capacity release, exception aging, data quality and reporting time	Connects activity to business outcome

The recommended path is deliberately practical: reduce manual leakage, stabilise the data foundation, automate narrow workflows, then expand into AI-assisted operations once source data and accountability are trustworthy.

ProcessScout final report sample
 Evidence, not theater. Board-ready recommendations backed by source material.

