

Where AI can create the first measurable advantage.

SAMPLE CLIENT

An anonymised UK mid-market B2B services company

180 people | Three operating sites | Multi-channel order intake

EXECUTIVE READOUT

The company is losing speed and margin where customer orders arrive through shared inboxes, PDFs and messaging channels before being re-keyed into the ERP.

Our recommended first move is a governed order-intake agent. It reads incoming documents, validates customer and product data, prepares the ERP entry and routes genuine exceptions to the order desk.

WHY THIS GOES FIRST

- High-frequency work with a visible baseline.
- Clear human approval point before posting.
- Useful data already exists in orders and the ERP.
- A narrow pilot can prove value without a system replacement.

RECOMMENDED FIRST MOVE

Order intake agent

Pilot one customer segment, one inbox and one ERP workflow before expanding.

VALUE

High

RISK

Controlled

01

Workflow observed

Follow the real work, including exceptions and workarounds.

02

Opportunities scored

Compare value, feasibility, speed, data readiness and risk.

03

First move chosen

Define a pilot with an owner, boundary and measurable outcome.

Illustrative sample only. Company details, findings and figures are fictionalised.

PRIORITY MAP

Opportunity shortlist

A decision-ready view of where to act now, what to prepare next and what not to automate yet.

OPPORTUNITY	VALUE	SPEED	RISK	DECISION
Order intake agent	High	Fast	Low	Pilot
Quote drafting assistant	High	Medium	Medium	Prepare
Internal knowledge search	Medium	Fast	Low	Next
Cash collection workflow	Medium	Medium	Medium	Validate

RECOMMENDED 90-DAY ROUTE

01 Baseline Measure current handling time, correction rate and exception volume.	02 Pilot Run one controlled order stream with human approval before ERP posting.	03 Decide Compare evidence with the baseline, then expand, revise or stop.
--	--	--

WHAT WE WOULD VALIDATE ONSITE

- | | |
|---|--|
| 01 The real exception types and who resolves them. | 03 Document quality across email, PDF and messaging channels. |
| 02 ERP access, permissions and audit requirements. | 04 The baseline that makes a pilot commercially testable. |

Illustrative sample only. Company details, findings and figures are fictionalised.