SAMPLE DELIVERABLE, FULL AUDIT

AI Workflow Audit

Client Redacted · Commissioned After Free Scoping

PREPARED BY
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DATE
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VERSION
Sample 1.0

ABOUT THIS SAMPLE

This is a real AI Workflow Audit produced by Expert Digital Marketing Ltd, reproduced with the client's identity and commercially sensitive figures removed.

It is the **full audit**, commissioned after the client's free scoping audit indicated a strong return from agentic AI. The scoping audit ranks the opportunities and puts an indicative return against each one. This document is what follows when those numbers justify going further.

Company name, staff names, system instance names and absolute revenue figures have been redacted or rounded. The structure, method and depth are unchanged from the document the client received.

> **Please Note:** Figures in this sample are indicative of the redacted engagement and are not a forecast for your business. Your audit models your own processes, your own volumes and your own costs.

THE CLIENT IN BRIEF

ATTRIBUTE	DETAIL
Sector	Ecommerce, physical products
Team Size	14 people
Platform	Shopify Plus, plus a third party ERP
Trigger For The Audit	Headcount rising faster than order volume
Preceded By	Free scoping audit, strong ROI indicated

SCOPE AND METHOD

The free scoping audit had already flagged order handling and internal reporting as the likely candidates. The full audit exists to prove or disprove that, and to put defensible numbers against it.

We spent two days with the operations, customer service and merchandising teams. Rather than working from the written process documents, we traced how work actually moves: what gets opened, what gets copied, what gets chased, and where people wait. That depth is the reason this stage is chargeable and the scoping audit is not.

WHAT WE LOOKED AT

1. Order and fulfilment handling from placement through to dispatch confirmation.
2. Supplier data intake, including price and stock files.
3. Customer service triage across email and the helpdesk.

4. Recurring internal reporting, daily and weekly.
5. Catalogue and product data maintenance.

WHAT WE DELIBERATELY EXCLUDED

Finance reconciliation and payroll were out of scope at the client's request. Anything requiring a regulated approval step was noted but not modelled, because the compliance burden outweighs the time saved.

WHERE THE TIME GOES

The single biggest finding was that no one person could see the total cost of a process, because each step sat with a different team. Aggregated, the picture changed the conversation.

PROCESS	HOURS PER WEEK	PEOPLE INVOLVED	SYSTEMS TOUCHED
Manual Order Data Entry	22	3	4
Weekly And Daily Reporting	16	4	5
Customer Service Triage	13	2	3
Supplier Price And Stock Files	11	2	3
Catalogue Maintenance	8	2	2
Total	**70**		

Time In Scope: **70** hours per week across five processes · **Equivalent To:** **1.8** full time roles · **Assessed As Automatable:** **61%** of those hours.

THE PATTERN UNDERNEATH

Four of the five processes existed only because two systems could not talk to each other. The work was not complex. It was transcription, and it was being done by people paid to do something more valuable.

AUTOMATION OPPORTUNITIES

Each opportunity was scored on value against effort. Value is hours returned plus error reduction. Effort is build time plus the integration risk of the systems involved.

OPPORTUNITY	HOURS RETURNED	BUILD EFFORT	PRIORITY
Order Reconciliation Agent	20	Medium	1

OPPORTUNITY	HOURS RETURNED	BUILD EFFORT	PRIORITY
Reporting Assembly Agent	14	Low	2
Supplier File Ingestion	9	Low	3
Customer Service Triage	8	Medium	4
Catalogue Maintenance	4	High	5
Total	**55**		

PRIORITY ONE, ORDER RECONCILIATION

Orders were being keyed from Shopify into the ERP by hand, then checked twice because the keying was unreliable. An agent reads the order, writes it to the ERP, verifies the write, and escalates only the records that fail validation.

This is the clearest case in the audit: high volume, rules based, and the current error rate is itself costing time downstream.

PRIORITY TWO, REPORTING ASSEMBLY

Four people were each building part of the same weekly picture. An agent pulls from source, assembles the report, and flags what changed rather than restating everything. The reason this ranks second despite lower hours is that the build is straightforward and it delivers within weeks.

THE MODELLED RETURN

Method: hours returned multiplied by a fully loaded internal hourly cost, set against build cost and the annual cost of running the agents. We modelled three adoption scenarios rather than presenting a single number, because the realistic outcome depends on how much of the escalation queue the team chooses to keep reviewing.

Conservative: Priorities one and two only, 60% of modelled hours realised. Payback in **7 months**.

Expected: Priorities one to three, 75% of modelled hours realised. Payback in **5 months**.

Full Programme: All five, 80% realised, phased across two quarters. Payback in **4 months**.

How To Read This: These bands are specific to the redacted client's cost base and volumes. The method is what transfers to your business, not the numbers.

WHAT WE WOULD NOT AUTOMATE YET

An honest audit says what to leave alone. Three things were explicitly ruled out.

1. **Catalogue Maintenance.** Ranked last for a reason. The product data model needs cleaning first. Automating on top of inconsistent data would industrialise the inconsistency.
2. **Complex Service Cases.** Triage is a good fit. Resolution is not. Cases involving refunds above the client's threshold stay with a person.
3. **Supplier Onboarding.** Volume is too low. The build would cost more than the time it returns, and we said so rather than quoting for it.

RECOMMENDED SEQUENCE

PHASE	SCOPE	DURATION	OUTCOME
Phase 1	Order reconciliation agent	4 weeks	Largest single time return, live
Phase 2	Reporting assembly	3 weeks	Four people off manual reporting
Phase 3	Supplier file ingestion	3 weeks	Price and stock accuracy improved
Phase 4	Review, then triage	4 weeks	Decision made on real data

Phase 4 is deliberately a review point. After three builds the client has real evidence on how much of the modelled benefit actually lands, and can stop or continue on that basis rather than on our projection.

ASSUMPTIONS AND CAVEATS

Assumptions: Hours were self reported by the teams and sense checked against system timestamps where available. Loaded hourly cost was supplied by the client. Build estimates assume existing API access with no platform upgrade required. **Caveats:** Modelled hours are not the same as hours recovered. Some returned time is absorbed rather than redeployed, which is why every band discounts the raw figure.

WHAT HAPPENS NEXT

This document is the deliverable. Where the numbers justify the work, we quote against this sequence and build it. Priority one is scoped and ready to start.

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