

AI Workflow & Operations Audit

\$7,500–\$15,000

ONE-TIME ASSESSMENT

Know which workflow to improve first and what a useful build will require.

BEST FIT

Leadership, sales operations, presales, finance, and support teams with repeated handoffs, scattered information, or uncertain AI priorities.

A quote moves through email, spreadsheets, and several people before anyone can confirm that the inputs are complete. Similar information is entered again in the CRM, order record, and commission worksheet. The audit traces that work so you can choose a practical first improvement.

— What you receive

AI and tool inventory

Document the tools in use, their owners, purposes, data access, and overlapping functions within the agreed business scope.

Workflow and duplication review

Map intake, decisions, handoffs, re-entry, approval points, and the exceptions that consume time. Record current time, touches, and error rates as the baseline for measuring results.

Source and readiness assessment

Identify authoritative documents, missing fields, access constraints, data owners, and risks that affect automation.

Prioritized opportunity roadmap

Rank opportunities by business value, effort, dependencies, and risk. State the assumptions behind the business case.

First-build recommendation

Define a focused scope, candidate acceptance measures, prerequisites, and a planning budget, or explain why the process is not ready.

— A focused starting scope

Start with the departments and workflows named in the proposal. A focused engagement might follow one sales-to-quote process across its handoffs; a broader assessment adds billing, commissions, support, or other teams.

— Delivery

01

Map the work

Interview process owners and review representative completed and failed cases.

02

Check the evidence

Compare observed steps with source records, tool use, and available operating metrics.

03

Make the decision

Review the ranked opportunities and agree the first build, remediation step, or no-build decision.

— What we need from you

A business sponsor, process owners, a tool list, representative documents, completed examples, and available volume or time data. Use redacted examples where possible.

— Scope boundaries

This is an operational and technical assessment. It does not include a production application, a formal financial audit, security certification, or an enterprise-wide compliance opinion. Build work is separately scoped.

— Investment and options

The number of departments and workflows, interview access, source quality, sensitivity of the data, and depth of the business case determine the final fee.

For one well-defined workflow, start with a Scoping & Data-Fit Assessment (\$2,500–\$5,000), credited in full to the build if it is signed within 60 days of the readout. For choosing among several workflows, this audit is the main starting point.

Planning ranges in USD; scope and fees are confirmed in a written proposal. Assessment, implementation, and ongoing care are priced separately unless combined. Third-party software, model usage, hosting, data feeds, travel, and applicable taxes are additional unless included.

Start with a fit call

Bring the workflow that creates the most rework. I'll define the assessment around that decision.

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