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01 / The business and its question

Example business: an installation firm with a small office and field engineers. The question: how can we manage requests and scheduling without repeatedly copying information?

Assumed workflow

Requests arrive by email. The office adds them to a planning list. After the job, someone transfers the job sheet into the invoicing system.

What we do not know

Which systems are used, whether they support integrations, and where rework happens. A website does not reveal how a company actually operates.

Check first

Walk through one recent job with both the planner and an engineer, from the first email to the invoice.

Example, not a client result or promise of savings.

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02 / Where work might be duplicated

These are possible handovers to investigate. They are invented for this example and must be verified in a real business.

Request → schedule

Address, contact and job description may be entered again. Check whether a shared request record could replace separate lists.

Job sheet → invoice

Photos, materials and hours may arrive separately. Identify which information is needed to close a job.

Customer → office

Status questions may interrupt the planner. Count repeated questions for a week and record why the answer is not readily available.

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03 / Three possible improvements

Start with one defined process. Not every improvement needs a new system or AI.

1 · A shared request overview

Keep the owner, next action and status together. First check whether the existing system can do this. Requirement: clear ownership of updates.

2 · Connect the job sheet

Investigate a connection between job sheets and invoicing. Keep a person reviewing information before sending. Requirement: suitable access to both systems.

3 · Answer questions faster

Start with standard status messages. Only investigate an assistant once information is reliable. Requirement: current data and a handover to a person.

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04 / What comes first

This sequence is an illustrative assessment, not a quote or a promise of savings.

First · working practices

Agree on one owner and a consistent status for each request. A small change with few technical dependencies. Measure missed follow-ups and search time before and after a trial.

Then · integration

Test one type of job sheet with the invoicing system. This depends on API access, data quality and exceptions. Expand only if the checks work.

Later · AI

Assess an assistant after the initial changes. If straightforward rules solve the problem, AI may not be needed here.

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05 / A small next step

Turn an assumption into a testable trial. This example intentionally contains no invented revenue or savings figures.

Collect

Bring a few recent jobs, their fields and recurring errors. Use anonymised examples: personal customer details are not needed to discuss the process.

Try

Choose one process and agree who will run the trial. Define improvement beforehand, such as fewer missing fields and fewer follow-up questions.

Decide

Compare the trial with the starting point. Stop, adjust or expand. Scope, cost and feasibility follow only after the assumptions have been checked.

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