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EXAMPLE AUDIT · SPECIMEN DOCUMENT

Where AI fits in a *wholesale* business.

Four workflows mapped, sixty three hours a week accounted for, five opportunities weighed, and one recommendation on what to build first.

PREPARED FOR

A technical wholesale business
26 staff · the Netherlands

SCOPE

Order intake, quotations,
supplier invoicing, service inbox

ISSUED

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Audit · fixed fee, no obligation

Read this first
This is a specimen. Its structure, method and level of detail match the document a client receives. The company, its systems and its figures are composites, so the findings could be shown in full rather than redacted.

What an Audit hands you at the end.

Not a list of tools, and not a slide about what AI could theoretically do. A record of how the work runs today, what each part of it costs in hours, and a recommendation you can act on or ignore.

01 Most of the lost time sits in one place.

The measured week
Figures are team totals per week, averaged over three weeks in September and cross checked with the people doing the work.

Across the four workflows we mapped, your team spends **63.5 hours a week** on work that is largely mechanical: reading documents, retyping what they say into another system, and looking things up to answer a question that has already been answered before.

Roughly **30 of those hours a week can be taken out** with technology that exists today and integrates with the systems you already run. Not all at once, and not from every workflow. The bulk of it sits in one place: order intake.

The other finding matters just as much. Two of the things on your own wish list, the customer service inbox and stock forecasting, are **not worth building yet**. Section 04 explains why, and what would have to change first.

63.5 h	27 to 37 h	~1,400 h
Spent each week on the four workflows we mapped	Realistically removable each week, once built and settled	Per year, at 46 working weeks. Worth about €53,000 at your loaded rate

WHAT THOSE HOURS ARE, AND ARE NOT

Recovered hours are not a cost saving on their own. Nobody leaves, and the payroll does not change. What you get back is **capacity**: two inside sales people who can handle a busier season without a third hire, and quotes that go out the same day instead of two days later. The euro figures in this document are what that time is worth *if you put it back to work*. Where we quote a payback period, we assume you only manage to use half of it.

The recommendation
In full in section 06.

Build the order intake assistant first. It accounts for over half of the recoverable time, it touches one system rather than four, and it can run alongside the current process while it proves itself.

02 Where the numbers in this document come from.

Why this section exists
An estimate you cannot trace is a guess with a decimal point. Everything in section 05 can be traced back to one of the four sources listed here.

The Audit ran over two weeks. Most of what is useful in it came from watching the work happen and asking the people who do it, not from a questionnaire.

01 **Two half days on site.** Six people interviewed by role: two inside sales, one warehouse lead, one finance administrator, the commercial manager, and the owner.

02 **Three weeks of volume data.** Message counts from the shared order mailbox, order line counts from the ERP, and supplier invoice counts from the finance inbox.

03 **Timed samples.** Forty orders, fifteen quotations and twenty five supplier invoices, timed end to end by the people processing them.

04 **A systems review.** What your ERP, mailbox and document storage can and cannot be connected to, confirmed against their documentation rather than assumed.

HOW TO READ THE ESTIMATES

TERM	WHAT IT MEANS HERE	PRECISION
Hours per week	Team total across everyone who touches the step, not per person	Within about 15%
Removable	The share of a step a system can take over, with a person still approving the result	A range, not a figure
Value	Removable hours at €38, your loaded hourly cost including employer charges	Indicative
Effort	Build and integration work, in weeks, before anything goes live	Indicative
Confidence	How sure we are, given what we could verify in two weeks	High, medium or low

What we could not verify. Your ERP supplier had not confirmed API access at the time of writing, so section 07 treats it as an open question rather than a given. The volume sample also falls in September, which your team describes as an average month. If it is not, the annual figures move with it.

03 Four workflows, drawn to the hour.

How to read a ledger
Every step is a bar, scaled to the hours it takes each week. The copper part is what a system can take over. The dark part stays with a person, either because judgement is needed or because the input is not machine readable.

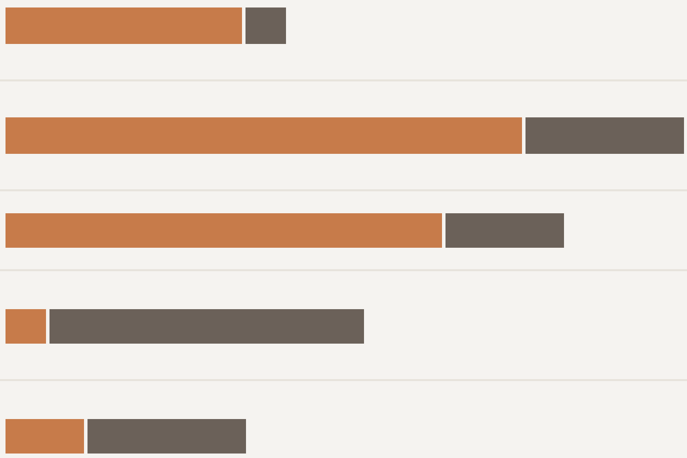
Each workflow below is the process as your team described it, not as the procedure says it should run. Where the two differed, we drew what actually happens. Bars are on one shared scale, so a long bar in one workflow is directly comparable to a long bar in another.

A system can take this over — Stays with a person

Order intake

3 PEOPLE · 26.5 H PER WEEK · ~240 ORDERS

Sorting and assigning incoming order mail Inside sales	3.5 h
Reading order documents, matching article numbers Inside sales	8.5 h
Keying order lines into the ERP Inside sales · admin	7.0 h
Checking stock and confirming delivery dates Inside sales · warehouse	4.5 h
Confirming orders and chasing unclear ones Inside sales	3.0 h

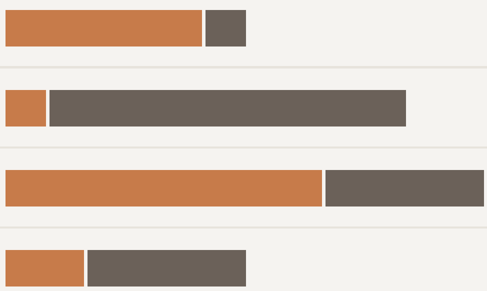


Removable: 14 to 18 hours a week. Two thirds of this workflow is reading a document and retyping it. About one order in eight arrives in a format nobody has seen before, and those stay manual either way.

Quotations

2 PEOPLE · 17.0 H PER WEEK · ~35 QUOTES

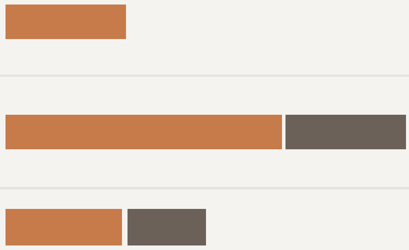
Finding comparable past quotes Inside sales	3.0 h
Pricing and margin checks Commercial manager	5.0 h
Writing and formatting the quote Inside sales	6.0 h
Following up on open quotes Inside sales	3.0 h



Removable: 6 to 9 hours a week. Pricing stays human. Assembling the document around the price does not.

Supplier invoice handling

1 PERSON · 9.0 H PER WEEK · ~130 INVOICES

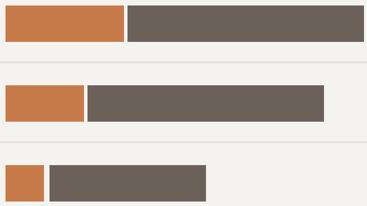


Collecting invoices from mail and portals	Finance admin	1.5 h
Matching invoice lines to purchase orders	Finance admin	5.0 h
Entering and routing for approval	Finance admin	2.5 h

Removable: 5 to 7 hours a week. The smallest workflow, but the highest proportion removable, because the matching rule is already written down and consistently applied.

Customer service inbox

4 PEOPLE, SHARED · 11.0 H PER WEEK · ~310 MESSAGES



Reading and triaging messages	Shared	4.5 h
Looking up order and delivery status	Inside sales	4.0 h
Writing replies	Shared	2.5 h

Removable: 2 to 3 hours a week. Low, and the reason is in section 04. The questions look repetitive but the answers are not.

THE WEEK, TOTALLED

WORKFLOW	HOURS	REMOVABLE	SHARE
Order intake	26.5 h	14 to 18 h	About 60%
Quotations	17.0 h	6 to 9 h	About 45%
Supplier invoice handling	9.0 h	5 to 7 h	About 70%
Customer service inbox	11.0 h	2 to 3 h	About 25%
Total	**63.5 h**	**27 to 37 h**	**About 50%**

04 The honest half of the answer.

Why this matters
The quickest way to lose money on AI is to build something for a process that was never the problem. Two of the four candidates here fall into that category.

The pattern across your four workflows is consistent. Where a document arrives in a predictable shape and has to be turned into structured data, automation works well and is cheap to prove. Where the work is deciding something, it does not, and dressing it up as an assistant just adds a screen for someone to check.

WHERE IT GENUINELY HELPS

- **Reading order documents.** The formats vary but the content does not. Extraction is reliable and the failure mode is visible, not silent.
- **Matching text to article numbers.** A customer writing "16mm copper elbow" instead of your code is exactly the gap this technology closes.
- **Drafting structured records.** Order lines, quote documents, invoice bookings: the system proposes, a person approves.
- **Matching invoice lines to purchase orders.** A written rule, applied consistently, at volume.
- **Assembling a quote around a decided price.** The writing, not the pricing.

WHERE WE WOULD LEAVE IT ALONE

- **The customer service inbox.** We read 120 messages. Most need a live fact from the ERP plus a judgement call about a specific customer. An assistant would draft a reply someone has to verify anyway.
- **Stock forecasting.** Your historical data has two years of gaps from the system migration. A forecast built on it would be confident and wrong.
- **Pricing and margin decisions.** These are commercial calls with customer history behind them. Automating them transfers risk without removing work.
- **Phone orders.** About 20% of intake. Recording and transcribing them is possible, but the error cost is high and the volume does not justify it yet.
- **The stock and delivery date check.** It is a conversation with the warehouse, not a lookup.

WHAT WOULD CHANGE OUR MIND

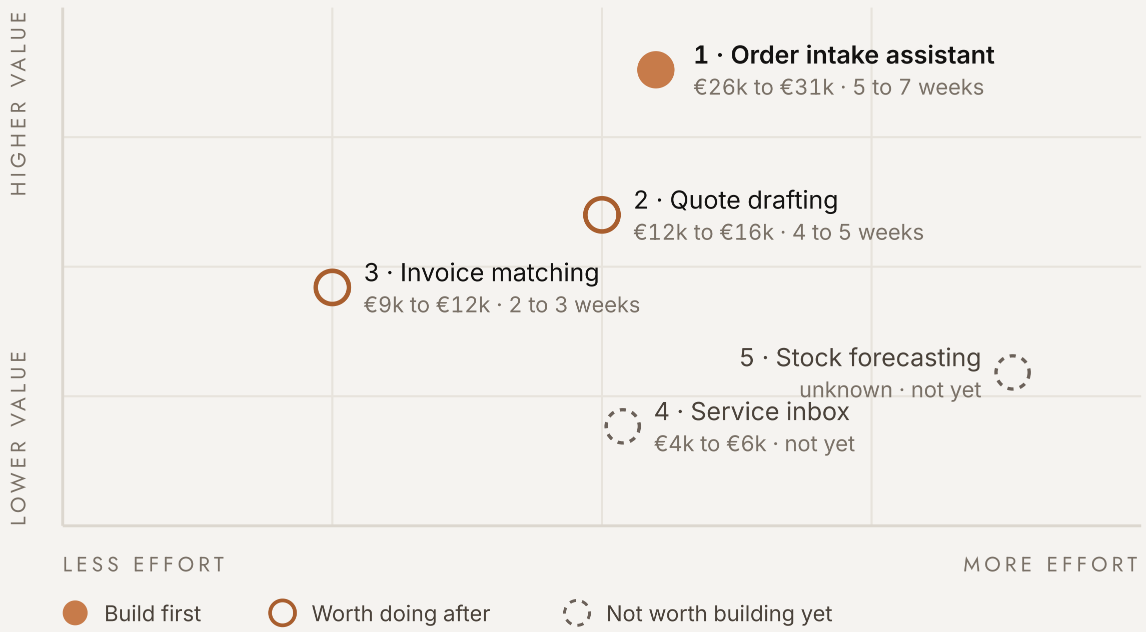
The service inbox becomes worth building once order status can be read live from the ERP, because then a draft reply contains a fact rather than a placeholder. That is the same integration the order intake assistant needs, so it may arrive as a side effect. Stock forecasting becomes worth revisiting after roughly eighteen months of clean post migration data, which puts it in 2028 at the earliest.

05 Five candidates, and the order to take them in.

Value
Removable hours a year at €38 loaded cost.

Effort
Build and integration weeks before anything runs live.

Everything we found is plotted below on the only two axes that decide the order of work: what it is worth in a year, and what it takes to build. Confidence is carried in the table, not the plot, because an uncertain estimate should not look precise.



#	OPPORTUNITY	VALUE A YEAR	EFFORT	CONFIDENCE
1	**Order intake assistant**	€26,000 to €31,000	5 to 7 weeks	High
2	**Quote drafting**	€12,000 to €16,000	4 to 5 weeks	Medium
3	**Supplier invoice matching**	€9,000 to €12,000	2 to 3 weeks	High
4	Service inbox assistant	€4,000 to €6,000	4 weeks	Low
5	Stock forecasting	Unknown	10 weeks +	Low

THE THREE WORTH DOING

01 Order intake assistant

BUILD FIRST

Order documents arriving in the shared mailbox are read, the lines are matched against your article master, and a draft order is prepared in the ERP for inside sales to approve. Anything the match is unsure about goes to a review queue instead of into the system.

VALUE A YEAR	BUILD EFFORT	CONFIDENCE
€26,000 to €31,000	5 to 7 weeks	High · volumes measured

02 Quote drafting

WORTH DOING AFTER

A request comes in, comparable past quotes are surfaced automatically, and the document is assembled once the commercial manager has decided the price. The decision stays where it is. The forty minutes of assembly around it does not.

VALUE A YEAR	BUILD EFFORT	CONFIDENCE
€12,000 to €16,000	4 to 5 weeks	Medium · 15 quotes timed

03 Supplier invoice matching

WORTH DOING AFTER

Invoices are collected from mail and supplier portals, matched line by line against the purchase order, and booked for approval. Only mismatches reach a person. The smallest of the three builds, and the one with the cleanest rule behind it.

VALUE A YEAR	BUILD EFFORT	CONFIDENCE
€9,000 to €12,000	2 to 3 weeks	High · rule already written

HELD BACK, AND WHY

04 · Service inbox
The questions repeat, the answers do not. Revisit once the ERP integration from opportunity 01 makes live order status available to a draft reply.

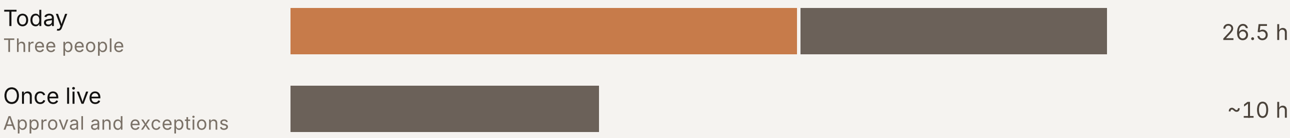
05 · Stock forecasting
Two years of gaps in the sales history from the system migration. Revisit after roughly eighteen months of clean data, so 2028 at the earliest.

06 The order intake assistant.

Why this one
It holds over half the recoverable time, it touches one system rather than four, and it can run beside the current process until it has earned trust.

Orders arrive as PDFs and email text in the shared mailbox, and three people spend most of their week turning them into ERP lines. That is the single largest block of mechanical work in the business, and it is the kind of work this technology is genuinely good at.

THE WEEK THIS WORKFLOW COSTS, BEFORE AND AFTER



HOW IT WOULD WORK

01 An order lands in the shared mailbox and is picked up automatically, PDF or plain text.

02 The lines are read out of the document: article description, quantity, reference, requested date.

03 Each line is matched against your article master and given a match score.

04 A draft order appears in a review screen with the source document beside it, matched lines in green and uncertain ones flagged.

05 Inside sales approves or corrects, and only then is the order written to the ERP. Every correction is kept, so the matching improves on the terms your customers actually use.

WHAT IT DELIBERATELY WILL NOT DO

- **Write to the ERP unattended.** Not in the first phase, and not until the match rate has been stable for a quarter.
- **Handle phone orders.** Out of scope. They stay exactly as they are.
- **Check stock or promise a date.** That conversation with the warehouse stays with a person.
- **Invent an article.** No confident match means a flag, never a guess.
- **Replace anyone.** The design assumes the same team, handling more.

5 to 7 wks
From kickoff to running alongside the current process

€7k to €10.5k
Indicative build, fixed in a proposal before anything starts

~7 months
To pay for itself, assuming only half the recovered time is used

07 What has to be true for these numbers to hold.

Before a proposal
The two items marked as open below are checked first. If either fails, the recommendation changes and we will say so rather than work around it.

Every figure in this document rests on something we either measured, were told, or could not yet confirm. Here they are, separated.

ASSUMPTIONS

WHAT WE ASSUMED	BASIS	STATUS
Order volume of about 240 a week	Measured, 3 weeks	Confirmed
September is a representative month	Told by the team	Accepted
Loaded hourly cost of €38	Given by finance	Confirmed
46 productive weeks a year	Holiday schedule	Confirmed
Your ERP allows order creation through an API or import file	Not yet answered by the supplier	**Open**
The article master is complete enough to match against	Sampled, 12% gap found	**Open**

RISKS, AND WHAT WE WOULD DO ABOUT THEM

RISK	IF IT HAPPENS	LIKELIHOOD
The ERP has no usable interface	Fall back to a generated import file, which your team uploads. Adds roughly a week and leaves about 3 hours a week on the table.	Medium
Article matching stays below 85%	The review step takes longer than modelled and the saving lands nearer 11 hours than 16. Still worth building, on a longer payback.	Medium
The team keeps working around it	The most common reason automation fails. Handled by involving the two people who do the work in the review screen design, not by training them afterwards.	Low to medium
A large customer changes document format	Extraction quality drops for that customer until the template is retrained. A day of work, covered under maintenance.	Low

On the build figure. The €7,000 to €10,500 range is indicative, based on the scope described in section 06 and on the ERP question resolving in the ordinary way. An implementation is quoted at a fixed price in a separate proposal, after those two open items are closed. Nothing in this Audit commits you to it.

08 Three ways forward, and one of them is nothing.

The Audit is finished and settled on its own. What happens next is entirely your decision, and stopping here is a normal outcome we have no problem with.

OPTION A

Take it in house

Everything in this document is yours: the workflow maps, the figures, the reasoning. Your own IT partner can build from it, or you can shelve it. No part of it is locked to us.

OPTION B

Build the recommendation

We close the two open items in section 07, then quote the order intake assistant at a fixed price. If either item fails, we tell you before you spend anything on a build.

OPTION C

Start with the small one

Supplier invoice matching is two to three weeks and the cleanest rule of the three. A smaller way to find out whether working like this suits you.

Aivonto.com

Consulting firm helping businesses through automation, implementation & strategy.

QUESTIONS ABOUT THIS AUDIT

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ABOUT THIS SPECIMEN

A composite example, matching the structure and detail of a real Audit. Figures illustrate the method rather than describe any one client.