

What a business diagnostic actually returns.

This fictional field-service company shows the report structure and decision logic. The facts below are demonstration inputs. No adoption, savings, or client outcome is claimed.

DECISION BRIEF

Repair the handoffs before adding an AI agent.

The supplied example shows enquiries arriving in a shared inbox, estimates assembled from memory, job evidence stored across phones, and invoice preparation waiting for office re-entry. The first opportunity is a controlled information path, not autonomous decision-making.

Configure Standardize service items, statuses, templates, and required fields in the existing field-service platform.	Integrate Move approved job evidence and invoice-ready data between the field platform and accounting.
Build later Draft intake summaries and follow-up only after sources and ownership are stable.	Keep human Price exceptions, safety judgment, customer commitments, credits, and payment approval.

01 / EVIDENCE RECEIVED

Known facts and unknowns stay separate.

The diagnostic does not turn assumptions into facts. Each conclusion keeps its evidence label and names the information needed to verify it.

OBSERVED IN DEMONSTRATION INPUT

Work crosses several disconnected surfaces.

Lead details begin in a shared inbox. Estimate details are assembled manually. Field photos and notes are not consistently attached to the job record. Invoice preparation requires office review and re-entry.

UNKNOWN / BASELINE REQUIRED

Economic effect is not yet measurable.

Lead volume, response time, estimate turnaround, invoice lag, rework, conversion, and average job value were not supplied. A credible savings or revenue claim cannot be calculated yet.

02 / OPERATING MAP

Follow the work from demand to cash.

Every stage names the source, accountable role, decision, output, and exception. The compact view below shows where the demonstration workflow loses continuity.

■ Enquiry received	■ Details re-entered
■ Estimate assembled	■ Job scheduled
■ Evidence scattered	■ Completion reviewed
■ Invoice rebuilt	■ Payment followed up
■ Exceptions escalated	■ Result measured

03 / RANKED LEAKS

Priority follows dependency, not novelty.

No score is presented as measured impact. The order reflects the supplied workflow dependencies and must be confirmed with operating data.

PRIORITY 01

No stable service and pricing structure

Quotes cannot be reliably drafted or compared until services, units, exclusions, approval rules, and exception ownership are explicit.

PRIORITY 02

Job evidence does not close the loop

Photos, notes, approvals, changes, and completion status need one job record before downstream invoice automation is safe.

PRIORITY 03

Invoice readiness depends on memory

A deterministic readiness check should verify required evidence and approved changes before a draft reaches accounting.

PRIORITY 04

Follow-up has no accountable queue

Reminders can be automated only after owner, due time, stop condition, escalation, and source of truth are defined.

04 / 30-60-90 SEQUENCE

Earn complexity in stages.

Each phase must leave observable evidence before the next phase is approved.

01 Days 1–30 Baseline response and invoice lag. Define service items, required intake fields, job statuses, evidence rules, owners, and exception paths.	02 Days 31–60 Configure the existing platform. Connect one bounded handoff. Introduce queues and audit records. Test with a small set of real jobs.
03 Days 61–90 Add source-backed drafting where stable inputs exist. Compare the pilot with baseline. Expand only if quality and control hold.	04 Stop conditions Pause if ownership is unclear, required data is absent, the source cannot be audited, or a human approval boundary is bypassed.

WHAT THIS SAMPLE PROVES

The system produces a bounded decision path.

It demonstrates report structure, evidence separation, prioritization, and automation boundaries. It does not prove client adoption, implementation success, financial return, or suitability for a particular company.

THE NEXT INPUT

Baseline

Measure current volume, delay, error, rework, and ownership before promising an effect.

THE NEXT DECISION

One pilot

Select a contained workflow with a human owner, acceptance test, and reversible rollout.

USE YOUR FACTS

Replace the demonstration input with your operating reality.

Start with one recurring workflow, the systems it crosses, and the result that matters.

Request a diagnostic