

Find Your First AI Win

A self-guided AI audit for established businesses. Scan the business, then work through one process with the person who knows it best.

Choose Your First Opportunity

Start where a repeated problem affects customers, cash or delivery. Ask the people doing the work to show one recent example.

1. Scan the Business

Mark the repeated problems you can point to. For each area, name one real example - avoid guessing from a software demo.

Sales

Missed inquiries, slow quotes or follow-ups without an owner?

One example:

Service & Delivery

Missing job details, slow handoffs or repeated corrections?

One example:

Finance & Admin

Duplicate entry, invoice errors or reports assembled by hand?

One example:

People & Decisions

Chasing updates, searching for answers or owner approvals?

One example:

Choose a frequent problem with a visible business effect. Start with a process you can observe and change within a small pilot.

Find the Bottleneck

Follow one recent job, quote, request or report from start to finish. Include the email, spreadsheets and workarounds people actually use.

2. Audit One Workflow

Workflow, outcome and person responsible

What starts it? What counts as finished?

For each step: person / source or system / active minutes / waiting time / missing information.

Step 1

Step 2

Step 3

Step 4

Where did it wait, repeat or require the owner?

What did that delay or error affect?

Starting examples for your chosen focus: Preparing quotes; handing sold work to delivery; collecting job details; assembling reports.

Improve the Process First

Choose the process change before the tool. A clear rule or a system connection may solve the problem; AI is useful where interpretation is needed.

3. Rebuild the Weak Step

What input, ownership or rule is missing?

Which record is the reliable source? Who keeps it current?

What must the next person receive before accepting the work?

What would the improved sequence look like?

Choose the Right Mechanism

Rule

A clear condition and action, such as routing a complete request.

Integration

An exact transfer between systems, without retyping.

AI Tool

Interpret messy information or prepare a draft you can check.

Human Judgment

Approve consequential decisions and handle unusual cases.

Our first fix and why it fits

No tool can resolve a business policy your company has not decided.

Check the Business Case

Keep recovered time, cash savings and additional gross profit separate. Use conservative assumptions, then test them against real work.

4. Estimate the Value

Runs/week ____ Current active minutes/run ____

Expected minutes/run including review ____ Working weeks/year ____

Annual capacity hours = runs/week x (current minutes - expected minutes) / 60 x working weeks.

What specific work will replace the recovered admin time?

Distinct avoided cash costs: \$ ____ / year

Additional revenue you can fulfill: \$ ____ / year Gross margin: ____%

Ongoing software/support/review cash costs: \$ ____ / year

One-time implementation cost: \$ ____

Incremental gross profit = additional fulfilled revenue x gross margin. Year-one modeled net benefit = distinct avoided cash costs + incremental gross profit - ongoing cash costs - implementation cost.

Do not count the same capacity as both eliminated payroll and new work. Do not deduct costs twice if already included in margin. Check delivery capacity, adoption and quality with your finance team.

Conservative case and the assumption most likely to be wrong

Plan the First Implementation

Start with one process, a named owner and a measurable result. Test awkward cases before expanding what works.

5. Define a Small Pilot

Scope: jobs, users and time period

Outcome metric, baseline and quality check

Who owns it? What must a human approve?

Failure/exception route: who notices and finishes the work?

What would justify expanding? What would make us stop?

Turn Your Findings into a Working Process

Found a process worth improving? Book a free 30-minute consultation to discuss the bottleneck, its business value and what a first implementation could look like.

[Book a Free Consultation](#)

For a company-wide review, the paid SparkOS Transformation Audit maps systems and workflows, designs the strongest opportunities and builds a prioritized roadmap with implementation options.

This mini audit is a starting exercise, not a savings guarantee or a completed professional assessment.