

AI Readiness Audit Report (Preview)

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Ken Sample - Sole Proprietor (Home Services) – Operations Department

All client details, tools, and proprietary methods have been replaced with placeholders (XXXXXXXX XXXXXXXX).

1. Department Assessed: Operations — Service Workflow

This audit examined the Operations Department’s service workflow, focusing on how service estimates are prepared, reviewed, and delivered to customers. The goal is to identify inefficiencies, operational risks, and opportunities for automation.

Category	Pain Points Identified
Workflow	<ul style="list-style-type: none"> - Manual preparation of service estimates - Information scattered across emails and folders - No standardized estimate format
Data Handling	<ul style="list-style-type: none"> - Pricing pulled from multiple locations - No central repository - High chance of missing key details
Operational Risks	<ul style="list-style-type: none"> - Delayed estimate delivery - Missed follow-ups - Heavy reliance on the owner for approvals

1A. Pain Point Identification and Suggested AI Fixes

Pain Point	Root Cause	AI-Assisted Fix (Human-in-the-Loop)
Manual estimate preparation	Technician/owner assembles from memory or scattered notes	Technician inputs details into XXXXX-XXXXXX; AI assembles structured estimate instantly
Scattered pricing & missing info	Data stored in multiple places; inconsistent updates	AI pulls from the centralized XXXXX-XXXXXXX pricing datastore and fills missing fields



No standardized estimate format	Everyone creates their own version; no uniformity	AI uses standardized XXXXX-XXXXXX template for consistent estimates
Delayed estimate delivery	Manual prep + waiting for owner review	AI generates near-final quote instantly; human verifies in seconds
Missed follow-ups	No tracking or reminder triggers	AI logs quotes into XXXXX-XXXXXXX tracker and auto-schedules follow-ups
Heavy owner dependency	Only owner knows pricing rules and exceptions	Owner stays in review loop; AI handles 90% of assembly

2. Workflow Overview (Redacted)

BEFORE:

Customer Inquiry → Manual Info Gathering → Owner Prepares Estimate → Manual Review → Estimate Delivered → No Automated Follow-Up

AFTER (Proposed Future State):

Customer Inquiry → Centralized Intake → Standardized Estimate Assembly → Automated Review Triggers → Estimate Delivered → Follow-Up Activated

Note: Full workflow diagram redacted. Logic replaced with XXXXXXXX XXXXXXXX.

3. Readiness Score Breakdown

Criteria	Score (1-5)	Notes
Process Complexity	3	Standardizable with moderate variation
Availability	2	Pricing inconsistent; requires XXXXXXXX XXXXXXXX
Task Predictability	4	Highly repetitive service workflow