

AI Audit — Final Report

Example Facility Ltd · 18 employees · Facility services, Canton Solothurn · Audit week: [sample]

This is a sample. "Example Facility Ltd" is a fictional company and every number in this document is illustrative. The structure, depth, and scoring method are exactly what you receive from the real one-week AI Audit (CHF 4'900 fixed, fully credited toward an implementation package within 6 months).

1 · Executive summary

Finding: approx. **24 hours per week** of manual, repetitive work across 8 processes. Three processes are ready for automation now; realistic phase-1 relief is **~12 hours/week** (≈ CHF 26'000/year at a loaded cost of CHF 48/h). Recommended entry: the Micro package — after the audit credit, **CHF 1'000 net**. Estimated phase-1 payback: **under 3 months**. All figures are estimates based on the interviews and data reviewed during the audit week.

2 · Process inventory

#	Process	Volume	Manual effort	Systems involved
1	Supplier invoice intake & entry	~90 invoices/month	6.5 h/week	Email, PDF, bexio
2	Client email triage & standard replies	~180 emails/week	3.0 h/week	Outlook
3	Job intake: email → job sheet	~35 requests/week	4.0 h/week	Outlook, Excel
4	Monthly client reporting	14 clients/month	3.5 h/week equiv.	Excel, bexio, PDF
5	Quote creation	~8 quotes/week	2.5 h/week	Word, bexio
6	Shift-plan changes	daily	2.0 h/week	Excel, WhatsApp
7	Master data upkeep (sites, contacts)	ongoing	1.5 h/week	bexio, Excel
8	Payment reminders	~15/month	1.0 h/week	bexio

3 · Automation scores

Each process is scored 1–5 on impact, technical feasibility, and data readiness. The product ranks the portfolio; anything scoring low on data readiness moves to phase 2 with a preparation step.

Process	Impact	Feasibility	Data readiness	Priority
Supplier invoices	5	4	4	P1 — build now
Monthly client reporting	4	5	3	P2 — build now
Email triage + job intake	4	4	3	P3 — build now
Payment reminders	2	5	4	Quick win (bundled with P1)
Quote creation	3	4	3	Phase 2
Master data upkeep	3	3	2	Phase 2 — prerequisite cleanup
Shift-plan changes	3	2	2	Not now — data too fragmented

4 · The three builds, in detail

P1 — Supplier invoice intake (est. 4.5 of 6.5 h/week saved)

TODAY

Invoices arrive by email as PDF → printed or filed → line items typed into bexio by hand → coding errors surface at month-end.

TARGET

A Claude Skill reads each incoming PDF, extracts and codes the line items, and creates a *draft* entry via the bexio interface. A person approves every entry — nothing posts without review.

P2 — Monthly client reporting (est. 2.5 h/week equiv. saved)

TODAY

14 client reports assembled by hand each month from bexio exports and site Excel files; copy-paste errors recur.

TARGET

A Skill pulls the month's figures and site data, drafts all 14 reports in the house format; review takes ~15 minutes per report.

P3 — Email triage & job intake (est. 4.2 of 7.0 h/week saved)

TODAY

A shared inbox is triaged by two people; job requests are retyped into an Excel job sheet.

TARGET

A Skill classifies incoming mail, drafts standard replies for approval, and pre-fills the job sheet from the request text.

5 · Data readiness & safeguards

- **bexio**: clean and current — the strongest foundation; connected via its official interface (MCP).
- **Email**: unstructured but well-suited to language models; drafts only, humans send.
- **Site master data**: split across bexio and three Excel files with conflicts — consolidation is the phase-2 prerequisite.
- **Shift data**: too fragmented (Excel + WhatsApp) — fix the process before automating it.
- **revDSG**: processing stays inside the systems already in use; no client data enters model training; every outbound action has a human approval gate.

6 · Roadmap & investment

Phase 1 — recommended (6 weeks)

Item	Amount
Micro package: supplier-invoice Skill + bexio integration, incl. reminder quick win	CHF 5'900
AI Audit already paid — fully credited (booked within 6 months)	– CHF 4'900
Net investment, phase 1 (excl. 8.1% VAT)	CHF 1'000

Phase 2 option after master-data cleanup: reporting + email triage as add-on Skills (CHF 2'900 each) or Starter upgrade. Ongoing operation available as Managed AI Operations from CHF 1'200/month.

7 · Next steps

1. Decision on phase 1 (this quote is valid for 6 months from the audit date).
2. Kick-off week 1: access setup, the five-phase method starts at Discovery hand-over.
3. Go-live target: week 6, with a two-week supported parallel run.

Sample document. "Example Facility Ltd" is fictional; all figures are illustrative estimates, produced with the same method used in real audits. Real reports run 10–14 pages including appendices (interview notes, system inventory, scoring rationale per process). eFlury Consulting · Keltenweg 4 · 2540 Grenchen · Switzerland

This is what CHF 4'900 buys — and it's free if we build together.

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