

SAMPLE REPORT

AI Ops Blueprint Sample Report

An anonymized excerpt showing the structure of a paid AI Ops Blueprint. The real report is built from leadership discovery, employee signal capture, workflow evidence, ROI assumptions, governance constraints, and implementation readiness.

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How To Use This Sample

Use this sample to understand the decision structure. Do not copy the numbers into a proposal.

Every real Blueprint depends on company-specific workflow volume, data access, ownership, risk, and willingness to change process.

Decision Gate: The Blueprint exists to reduce uncertainty before implementation money is spent.

Executive Summary

The client team was not failing because they lacked AI enthusiasm. They were failing because useful work lived in scattered habits, undocumented spreadsheets, meeting transcripts, Slack threads, and manager memory.

Leadership needed three things:

- A clear view of which workflows were worth improving first.
- A way to separate safe quick wins from higher-risk automation candidates.
- A practical 30/60/90 day path that did not create another pile of disconnected AI experiments.

Recommendation: install three low-risk quick wins immediately, validate one finance automation with controlled examples, and defer customer-facing autonomy until review controls and source data are cleaner.

Opportunity At A Glance

Signal	Finding
Recoverable time	340 hours per month across reviewed workflows
Validated candidates	37 workflow candidates with enough signal to score
First sprint value	\$62K per year in conservative annualized value
Payback window	46 days if the first sprint lands within expected range
Highest risk area	Customer-facing communication without review controls
Best starting point	Meeting action capture, weekly ops brief, invoice exception triage

Current State

Managers spent 8 to 12 hours weekly rebuilding updates from meetings, invoices, Slack threads, customer handoff notes, and one-off spreadsheets. Some employees were using AI tools informally, but the work was not governed, documented, or repeatable.

The biggest bottleneck was not tool access. It was workflow visibility. Leadership could not see what repeated work existed, which systems were involved, who owned the review step, or where AI would create measurable improvement.

Target State

The team needs a reviewed weekly operating brief, an exception queue for repeatable finance issues, and a ranked AI backlog that prevents random experiments from becoming shadow infrastructure.

Success looks like this:

- Managers receive a consistent weekly brief from approved sources.
- Action items from meetings are captured in one reviewed format.
- Invoice exceptions are routed by reason, owner, and review status.
- Leadership has a ranked backlog with ROI assumptions and risk boundaries.
- Every AI-assisted workflow has an owner, reviewer, and maintenance rule.

Impact-Effort Matrix

Quadrant	Meaning	Sample Candidates
Quick Wins	Low effort, visible value, safe to install immediately	Meeting action capture, invoice exception triage, weekly ops brief
Major Projects	High value, requires access, integration, and governance	Customer onboarding command center, inventory exception prediction
Fill-Ins	Useful after the core bottlenecks are handled	Policy lookup assistant, vendor comparison prompt SOP
Ignore For Now	Too vague, low frequency, or not worth the risk yet	General company chatbot, autonomous customer email replies

Recommended Solution 1: Ops Meeting Action System

Implementation level: Level 1, training and assistant.

Owner: Operations Manager.

Setup effort: 2 business days.

Estimated recurring cost: \$20 to \$60 per month.

Value assumption: 45 hours per month recovered from manual action-item cleanup and follow-up reconstruction.

Risk boundary: Low. The assistant drafts the output, but the meeting owner reviews and approves every action item before it enters the operating cadence.

Why this fits:

- Meeting transcripts already exist.
- The workflow is frequent and visible.
- The output format can be standardized quickly.
- Failure risk is low because no customer action happens without review.

Next validation step:

- Test on five recent meetings.
- Compare assistant output against human notes.
- Track missing owner, missing date, hallucinated action, and wrong priority.

Recommended Solution 2: Invoice Exception Triage

Implementation level: Level 2, workflow automation.

Owner: Controller.

Setup effort: 1 to 2 weeks after data access is approved.

Estimated recurring cost: \$100 to \$400 per month.

Value assumption: \$31K to \$48K per year in time and error reduction if review accuracy meets threshold.

Risk boundary: Medium. The workflow can classify and route exceptions, but it must not release payment, approve vendors, or change accounting records without human review.

Why this fits:

- Exceptions are repeated and measurable.
- The team can define a clear owner for each category.
- The work is valuable enough to justify a controlled pilot.
- Risk can be managed with logs and reviewer approval.

Next validation step:

- Run the workflow against historical examples.
- Record classification accuracy and review time.
- Confirm which fields are safe to process automatically.

Recommended Solution 3: Onboarding Command Center

Implementation level: Level 3, custom workflow and operating layer.

Owner: COO.

Setup effort: 4 to 6 weeks after scope validation.

Estimated implementation range: \$15K+.

Value assumption: \$120K+ per year if onboarding cycle time drops by 30 percent.

Risk boundary: Medium. This touches customer handoff, CRM status, internal documentation, and executive reporting. It needs implementation discipline, access control, logging, and rollback.

Why this fits:

- The pain is cross-functional.
- Cycle time has business value.
- Manual handoffs create visible delay.
- The workflow is too important for a throwaway tool.

Next validation step:

- Complete the implementation brief.
- Map required systems and owners.
- Identify the human review points.
- Confirm baseline onboarding time and current error rate.

30/60/90 Day Roadmap

Window	Focus	Output
Days 1 to 7	Install safe wins	Meeting capture, weekly ops brief, and approved prompt SOPs for three repeated workflows
Days 8 to 30	Validate first automation	Invoice exception triage tested on historical examples with review accuracy documented
Days 31 to 60	Build first production sprint	Highest-confidence workflow deployed with owner, reviewer, logging, rollback, and success metrics
Days 61 to 90	Install operating cadence	Monthly backlog review, governance updates, manager training, and fractional ownership decision

Financial Impact

The first sprint should only proceed if three validation inputs hold:

- The workflow occurs often enough to matter.
- Human review accuracy stays above the agreed threshold.
- The implementation does not create new compliance, customer, or financial risk.

Conservative case: \$31K per year in time and error reduction.

Expected case: \$62K per year in annualized value.

Aggressive case: \$120K+ per year if onboarding cycle time improves and manager follow-up load drops.

Required Output: All ROI numbers must be treated as assumptions until the first pilot validates workflow volume, review accuracy, and cycle-time improvement.

Next Step

Recommended path: proceed with one controlled implementation sprint after the quick wins are installed and invoice exception testing confirms the expected review accuracy.

Do not build: a general company chatbot, autonomous customer email replies, or anything that changes financial records without human review.

Decision needed from leadership:

- Confirm the workflow owner.
- Approve the data boundary.
- Approve the reviewer.
- Approve the first success metric.
- Decide whether AI-CTO.IO owns the sprint or trains the internal operator to run it.