

SAMPLE REPORT

Quick Wins Implementation Sample Report

An anonymized excerpt showing what a small implementation engagement leaves behind: installed fixes, before/after outcomes, delivery log, owner handoff notes, and the next AI operations decision.

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How To Use This Sample

Use this sample to understand the handoff structure.

The real Quick Wins report depends on the workflows selected during intake, approved tools, risk boundaries, and the owner who will maintain each fix.

Decision Gate: Quick Wins should install useful low-risk improvements and reveal whether deeper Blueprint work is justified.

Executive Summary

The team had obvious operational friction that did not require a full diagnostic before taking action. The work was repeated, low risk, and owned by managers who could review the outputs.

Four fixes were installed:

- Meeting-to-action capture.
- Weekly executive ops brief.
- Invoice exception intake.
- Internal policy assistant.

Estimated recovered time: 45 hours per month.

Recommendation: continue using the installed fixes for 30 days, track failures weekly, and move into Blueprint before connecting CRM, finance, or customer-facing workflows.

Installed Fixes

Fix	Owner	Before	After	Impact
Meeting-to-action capture	Operations Manager	Action items lived in transcripts, Slack, and memory	Every meeting creates a reviewed owner/date/action table	18 hrs/mo recovered
Weekly executive ops brief	COO	Leaders rebuilt updates from five systems before Monday standup	Approved source notes compile into a consistent weekly brief	12 hrs/mo recovered
Invoice exception intake	Controller	Finance manually sorted vendor questions and missing fields	Exceptions enter one queue with reason, owner, and review status	9 hrs/mo recovered
Internal policy assistant	People Ops	Managers answered repeated policy questions from old docs	Scoped assistant cites approved policy files and escalates edge cases	6 hrs/mo recovered

Fix 1: Meeting-to-Action Capture

Purpose: convert meeting transcripts into a consistent reviewed action table.

Owner: Operations Manager.

Approved inputs: transcript, attendee list, meeting agenda, and any pasted notes from the meeting owner.

Forbidden inputs: customer PII, HR matters, legal matters, passwords, financial account information, and private strategy not approved for the assistant.

Output format:

- Action item.
- Owner.
- Due date.
- Context.
- Blocker.
- Review status.

Review rule: no action item enters the operating cadence until the meeting owner reviews it.

Failure mode: hallucinated action, missing owner, vague date, or priority mismatch.

Fix 2: Weekly Executive Ops Brief

Purpose: turn approved source notes into a consistent weekly brief.

Owner: COO.

Approved inputs: manager updates, KPI notes, open blockers, active projects, and customer escalation notes approved for leadership review.

Output format:

- What changed.
- What is blocked.
- What needs leadership decision.
- What moved since last week.
- What risks need review.

Review rule: each department owner checks their section before the brief is sent.

Failure mode: stale update, wrong owner, unsupported claim, or missing blocker.

Fix 3: Invoice Exception Intake

Purpose: structure repeated finance exceptions so the Controller can route them faster.

Owner: Controller.

Approved inputs: vendor name, exception reason, invoice status, missing field, responsible owner, and notes approved for finance review.

Forbidden actions: payment approval, vendor approval, accounting-system changes, or customer-facing messages.

Output format:

- Exception reason.
- Responsible owner.
- Missing data.
- Next action.
- Risk flag.
- Review status.

Review rule: the Controller approves the category before any action is taken.

Failure mode: wrong exception category, missing vendor context, unsupported payment recommendation, or unapproved data field.

Fix 4: Internal Policy Assistant

Purpose: answer repeated manager questions from approved internal policy documents.

Owner: People Ops.

Approved inputs: policy PDFs, manager handbook, onboarding FAQ, and approved escalation guidance.

Forbidden inputs: employee-specific HR matters, legal claims, medical information, performance issues, or compensation decisions.

Output format:

- Short answer.
- Source document.
- Confidence note.
- Escalation rule.
- Suggested next step.

Review rule: managers can use the answer for orientation, but edge cases go to People Ops.

Failure mode: stale source, overconfident answer, missing citation, or failure to escalate.

Four-Day Delivery Log

Day	Work Completed	Evidence
Day 1	Selected safe fixes, confirmed owners, approved tools, and out-of-scope items	Intake notes and owner approval
Day 2	Configured first workflows with fake data and approved source examples	Draft prompts, assistant settings, and test examples
Day 3	Tested with workflow owners and corrected output formats	Pass/fail notes and revised instructions
Day 4	Delivered handoff notes and next-step recommendation	Owner checklist and decision memo

Owner Handoff

The fixes are only useful if owners maintain them. The client should follow these rules for the first 30 days:

- Do not let the meeting assistant assign tasks without human review.
- Update the approved source folder before each weekly brief.
- Keep invoice exception automation away from payment release decisions.
- Review assistant failures every Friday for the first month.

- Move to Blueprint before connecting CRM, finance, or customer-facing workflows.

Before And After

Before:

- Managers rebuilt work from scattered notes.
- Finance sorted the same exception types manually.
- Policy answers depended on memory and old documents.
- Leadership had no consistent view of repeated friction.

After:

- Four repeated workflows now have standard inputs and outputs.
- Each fix has an owner, review rule, and failure mode.
- The team has a short-term time-savings estimate.
- One larger workflow emerged as a Blueprint candidate.

Next AI Operations Decision

Recommendation: keep the four quick wins in place for 30 days and track time saved, missed outputs, and owner confidence.

Move to Blueprint if:

- The team wants to connect production systems.
- The workflow touches customer, financial, legal, HR, or regulated data.
- Leadership needs a ranked backlog and ROI math.
- The company wants to train internal operators rather than depend on ad hoc AI habits.

Stop or stay internal if:

- The fixes are useful but low value.
- The team can maintain them without outside help.
- There is not enough workflow volume to justify implementation spend.

Required Output: The next paid step should be based on evidence, not enthusiasm.