

Make the repeat work easier.

AI Opportunity Audit / Illustrative sample / 15 October 2026

Example only, not a customer result. A fictional two-person service business uses email, a shared calendar and a spreadsheet. It repeatedly answers scope questions, drafts quotes and chases missing intake details. No task timings or savings have been measured.

START HERE

Use approved reply drafts for repeat questions. Keep the person sending each reply. First test whether templates solve the problem; use AI only where a draft needs context from a longer enquiry.

01 HIGH / Reply drafting

Payoff: fewer repeated first drafts, with the owner checking facts and tone.

What it takes: ten anonymized enquiries, approved answers and one reviewer. Test ten held-out examples; require zero invented prices or commitments before use.

02 MEDIUM / Intake completeness

Payoff: fewer back-and-forth messages before preparing a quote.

What it takes: one short form with required fields and a missing-information checklist. Start with ordinary rules; AI is unnecessary for checking empty fields.

03 MEDIUM / Quote narrative

Payoff: a clearer first draft of the scope description.

What it takes: an approved scope library. Keep prices, tax and totals in the existing calculator. Compare drafts with five accepted examples; a person approves every quote.

04 LOW / Autonomous customer replies

Skip for now: unsupervised messages can make commitments or disclose information.

Revisit only after a reviewed draft workflow demonstrates reliable answers, clear escalation and an owner who can stop it. No automatic sending in this recommendation.

ONE-WEEK DECISION

Time ten manual replies, then ten reviewed drafts of similar difficulty. Count editing time and mistakes, not generation speed alone. Continue only if review-adjusted time falls and quality stays acceptable. Stop and keep templates if it does not.

Unknown: monthly volume, current handling time, tool permissions and subscription cost. Do not claim ROI until measured. Use anonymized examples; no passwords, payment details or private customer files are needed for this first test.