spurbuck advisory

AI Opportunity Assessment

Sample report

Prepared for

Example Co

A wholesale distributor with 180 staff

This is a sample.

Example Co, its people and every figure here are invented to show what you receive. A real assessment is written from your own processes, systems and data.

What you receive, shown on one invented company.

An AI Opportunity Assessment ends with a set of documents you keep, whether or not you build with us. This sample shows a cut-down version of each, for a company that doesn't exist.

Page 3	**Board summary**	A short paper your executive team can take to the board, in plain English, with the risks stated.
Page 4	**Opportunity register**	Every use case found, scored on value, effort and risk, with the reasoning written down.
Page 5	**Business case**	Baseline, target and monthly running cost for the automation most likely to return the investment. A real report costs two or three.
Page 6	**Readiness and controls**	What the use case connects to, what has to be fixed in the data first, and what the agent may do alone.
Page 7	**Roadmap**	The order to build in, what each stage proves, and the points where you can stop or continue.

What is left out. The fee for an assessment, and the build cost in the business case. Both depend on your organisation and your systems, so a made-up figure here would mislead. Where a real report states them, this sample shows a black bar.

AI: where we invest first

Recommended first build
Invoices
ranked 1 of 5

Running cost
$2,100
a month, all five cost lines

Staff time returned
110 hours
a month, against baseline

The recommendation

- Fund the first build now. Decide on the second after eight weeks of measured results.
- Risks: data quality in the supplier file, and reliance on one model provider. Each has a mitigation in the plan.
- Controls: payments above the approval limit still need a person, and every action is logged.

Sequence and decision points

Stage	What it proves	Board decides
1. Invoice processing	Agents can run inside finance, with approvals	Week 8
2. Management report	Reporting can be trusted without re-keying	Week 16
3. Enquiry triage	Customer-facing drafts meet your standard	Week 24

> Mapped to Australia's Guidance for AI Adoption. Written in plain English, with the risks stated.

Opportunity register

Every process we looked at was scored the same three ways. Five made the shortlist; the top three were costed in full.

Processes reviewed
23
across four business areas

Shortlisted
5
scored and ranked

Business cases
3
costed in full

The shortlist

Process	Value	Effort	Risk	Rank
Supplier invoice processing	High	Low	Low	1
Month-end management report	High	Medium	Low	2
Customer enquiry triage	Medium	Low	Medium	3
Stock reorder suggestions	Medium	Medium	Medium	4
Contract review	Medium	High	**High**	Later

Why invoice processing ranks first

- About 1,400 invoices a month are keyed by hand, in two systems.
- The data is ready: most arrive as PDFs from the same 30 suppliers.
- A person keeps approving every payment, so the delivery risk is low.

How each score is reached

- Value: the hours the process takes today and what its errors cost.
- Effort: how ready the data is, how many systems are involved and how many exceptions there are.
- Risk: what happens when the process is done wrong, and who would notice.

Supplier invoice processing

Ranked first: the most hours, the cleanest data and the lowest delivery risk on the shortlist.

Today
117 hours
a month: 1,400 invoices at 5 minutes each

With the agent
7 hours
a month, approving and handling exceptions

Staff time returned
110 hours
a month, against today's baseline

What changes

- Today, 1,400 invoices a month are keyed by hand into two systems.
- The agent reads each invoice, matches it to its purchase order and prepares the entry for approval.
- About 6% (84 a month) don't match and go to a person, with the reason attached.
- The 56 a month over the approval limit wait for the finance manager, as they do today.

Monthly running cost

Cost line	How it behaves	A month
Model usage	Scales with volume	$160
Platform and integration	Fixed each month	$640
People in the loop	7 hours at $60 an hour	$420
Monitoring and upkeep	Fixed each month	$680
Build and change	Allowance for changes after go-live	$200
Total		**$2,100**

Against today

The same work costs $7,020 a month in staff time today (117 hours at $60 an hour). The running cost above is $4,920 a month less.

Build cost and payback

Build cost: [redacted]
Payback: [redacted]

Left out of this sample. A real business case states both.

What it needs, and what it may do.

Systems and access

- Accounts inbox: read only.
- Finance system: read purchase orders, write draft bills.
- Supplier file: read only.

To fix in the data first

- Merge 41 duplicate supplier records.
- Record the approval limit for each cost centre in one place.

The agent's scope

May do alone

- Read invoices as they arrive
- Match each to its purchase order
- Prepare the draft entry

Needs a person

- Any invoice that doesn't match
- Any invoice over the approval limit
- Every payment

Never

- Change a supplier's bank details
- Release a payment
- Create a new supplier

Mapped to Australia's six essential practices

Essential practice	For this agent
Decide who is accountable	The finance manager owns the agent and is named in its written scope.
Understand impacts and plan accordingly	Accounts staff move from keying to approving. Suppliers see no change.
Measure and manage risks	Duplicate and altered invoices are the main risk: every invoice is matched to its order, and changed bank details are always held.
Share essential information	Finance staff can see which entries the agent prepared.
Test and monitor	Tested on three months of past invoices before go-live. A weekly report shows volumes, corrections and cost.
Maintain human control	Every payment is approved by a person, and the finance manager can pause the agent at any time.

One stage at a time, with a decision after each.

Each stage proves something the next one depends on. The board funds one step, sees measured results, then decides again.

Sequence and decision points

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Left for later

- Stock reorder suggestions: worth revisiting once the first three are running.
- Contract review: high effort and high risk today. Not recommended yet.

Want this for your own organisation?

It starts with a free thirty-minute discovery session with Tom Buckley. Book at **spurbuck.com/book** or email **tom@spurbuck.com**.

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