

Sales: personalised inbound lead follow-up

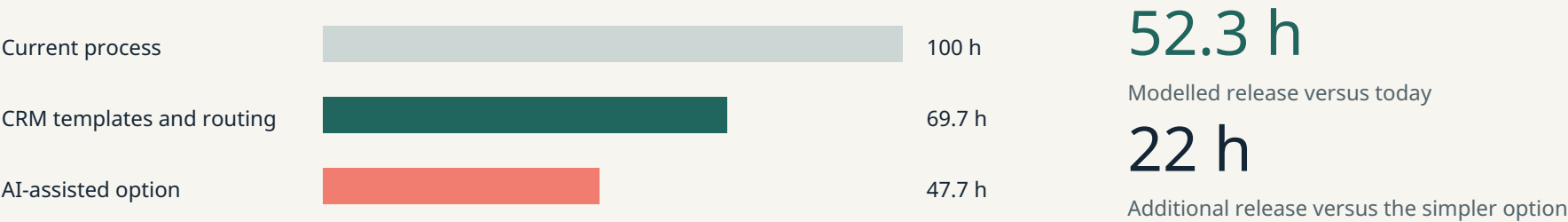
Test AI with human review

Run a bounded comparison with the simpler option, keeping human approval and a recovery path.

PROPOSED TREATMENT BY TASK

1. Check enquiry and suppression status	2. Draft a sourced, personalised reply	3. Account executive checks and approves the reply	4. Record the approved follow-up in CRM
Rules-based automation	AI assistance to test	Human decision	Rules-based automation

MONTHLY EFFORT / ACTIVE WORK + UPKEEP



Setup, financial costs and waiting time excluded.

OUTCOME: Qualified reply rate (% of enquiries) | Baseline 4 | Simpler 4.5 | AI 6 | Threshold ≥ 4 . Reported as measured.

Permitted data use	Accountability	Data and delivery	Error control and recovery	Action boundary
Reported - reconfirm	Reported - reconfirm	Reported - reconfirm	Reported - reconfirm	Reported - reconfirm

CAPACITY REINVESTMENT

Examine difficult enquiries and feed recurring objections into approved response guidance.

The decision and its basis

An interpretation task, promising reported task evidence and the proceeding conditions support a bounded comparison.
The modelled AI capacity advantage over the simpler option is 22 hours per month, before setup effort and financial costs.

Outcome comparison

Qualified reply rate (% of enquiries). Baseline: 4. Threshold: at least 4.

Simpler: 4.5 (meets). AI: 6 (meets).

Evidence: Reported as measured. Invented matched comparison, including exceptions. These are scenario inputs, not actual measurements.

One measure does not establish acceptable quality, fairness or control on its own. Check difficult cases and the stated stop criteria.

Team comparison plan

Context: Sales. Unit of work: inbound enquiries.

Authority: Act only after a person approves each case. Customer contact or public-facing output.

Scope: Compare both options on 100 permitted enquiries over four weeks, stratified by segment; review every draft. This sample is illustrative, not assurance.

Challenge cases: Include suppressed contacts, duplicate accounts, missing CRM fields and unsupported product claims; compare by customer segment.

Workflow boundary

Starts: A prospect submits a permitted inbound enquiry

Finished: An account executive approves the reply and CRM follow-up task

Reported incident: Sales staff repeatedly re-enter CRM details and rewrite generic replies.

Primary outcome: capacity. Main friction: rework. Process: clear.

Assumptions and calculation

Volume: 500 items/month. Current active effort: 12 minutes/item. Baseline: Reported as measured. Source: Invented fixture representing a four-week operating log; no real organisation or personal records..

CRM templates and routing: 8 minutes/item + 3 upkeep hours/month. Evidence: Reported as measured.

AI: 2 preparation/execution + 2 review + 1 expected rework minutes/item, plus 6 upkeep hours/month. Evidence: Reported as measured.

One-off setup: 24 hours. Waiting: Not estimated hours/item, excluded from active effort.

Monthly effort = items x total active minutes / 60 + upkeep. Released capacity = baseline - option effort. Financial costs are unestimated. Capacity release is not cash savings.

Review sensitivity

1 review minutes/item: 39.3 monthly hours; AI advantage over the simpler option: 30.3 hours.

2 review minutes/item: 47.7 monthly hours; AI advantage over the simpler option: 22 hours.

3 review minutes/item: 56 monthly hours; AI advantage over the simpler option: 13.7 hours.

With other inputs fixed, the capacity comparison is equal at 4.64 review minutes/item.

Conditions for proceeding

Permitted data use: reported. Permission reported by the respondent; reconfirm for the proposed processing.

Accountability: reported. Sales operations lead

Data and delivery: reported. Access and delivery capacity reported as available.

Error control and recovery: reported. A sales representative checks sources and suppression status before sending. Rejected drafts return to the queue.

Action boundary: reported. Act only after a person approves each case. Impact: Customer contact or public-facing output. Check source claims, contact permission, suppression lists and duplicate outreach. Separate drafting from sending.

Bounded comparison

Owner: Sales operations lead. Review date: 2026-11-30.

Success: Maintain at least 4% qualified replies, no unsupported claims and less total effort than CRM templates.

Stop or redesign: Stop for unsupported claims, suppressed contacts or a qualified reply rate below the agreed floor.

Data and systems: Permitted inbound enquiries, approved product claims and CRM fields..

Plausible failure: An inaccurate claim or message to a suppressed contact..

Set a scope, sample and budget cap with the owner before starting. No sample size or error threshold here constitutes assurance.

Capacity reinvestment plan

Intended use: Examine difficult enquiries and feed recurring objections into approved response guidance.

Accountable role: Sales operations lead. Planned allocation: 20 hours/month.

Effectiveness measure: Qualified replies and fewer unresolved recurring objections.

Protect time for better decisions and feedback, and track whether the intended outcome improves.

Measure capacity released, time actually reallocated and outcomes separately. Reinvestment uses released capacity; it is not an additional saving.

Method and limitations

Workflow Decision Map v2.1 is a practical synthesis, not a certification. Self-reported conditions require reconfirmation by the organisation. Unknowns are not treated as permission or evidence. This report does not authorise a pilot. Every input in this example is invented; there are no measured client results.

Method: <https://www.maliwansavage.info/ai-automation-audit/methodology>

Background: <https://www.maliwansavage.info/ai-blog/ai-opportunity-assessment-prioritisation>

Finance: contractor timesheet and invoice reconciliation

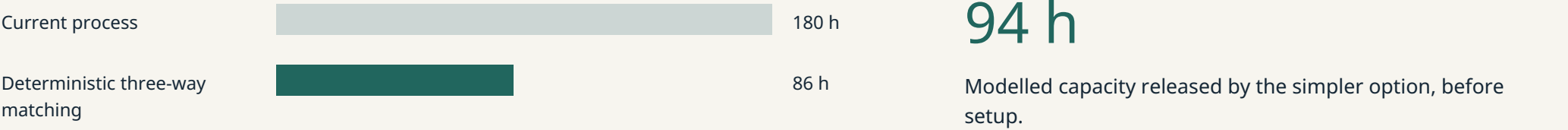
Evaluate the simpler option first

Compare the simpler process or rules-based option with the current approach before committing to a wider build.

PROPOSED TREATMENT BY TASK

1. Validate invoice and supplier identifiers	2. Match approved hours, rates and invoice totals	3. Flag duplicates and tolerance breaches	4. Finance reviewer resolves exceptions and approves
Rules-based automation	Rules-based automation	Rules-based automation	Human decision

MONTHLY EFFORT / ACTIVE WORK + UPKEEP



Setup, financial costs and waiting time excluded.

OUTCOME: Seeded mismatches detected (% of known mismatches) | Baseline 94 | Simpler 100 | Threshold >= 100. Reported as measured.

Permitted data use	Accountability	Data and delivery	Error control and recovery	Action boundary
Reported - reconfirm	Reported - reconfirm	Reported - reconfirm	Reported - reconfirm	Reported - reconfirm

CAPACITY REINVESTMENT

Investigate recurring supplier discrepancies and improve intake and exception rules.

The decision and its basis

The confirmed map contains stable rules and human decisions, without an identified interpretation task.

Outcome comparison

Seeded mismatches detected (% of known mismatches). Baseline: 94. Threshold: at least 100.

Simpler: 100 (meets).

Evidence: Reported as measured. Invented matched comparison, including exceptions. These are scenario inputs, not actual measurements.

One measure does not establish acceptable quality, fairness or control on its own. Check difficult cases and the stated stop criteria.

Team comparison plan

Context: Finance. Unit of work: invoices.

Authority: Act only after a person approves each case. Financial records, commitments or payments.

Scope: Replay 200 historical invoices with seeded duplicates, rate changes and missing approvals. No posting or payment; compare false negatives and false positives.

Challenge cases: Include duplicates, changed rates, missing approvals and currency or period mismatches. Test missed errors and false alerts; reconcile totals to source records.

Workflow boundary

Starts: An invoice arrives with approved timesheets and a contracted rate

Finished: Accounts payable approves matched invoices or assigns exceptions; payment is separate

Reported incident: Duplicate invoices and rate mismatches require repeated manual checks.

Primary outcome: capacity. Main friction: transfer. Process: clear.

Assumptions and calculation

Volume: 1,200 items/month. Current active effort: 9 minutes/item. Baseline: Reported as measured. Source: Invented fixture representing a four-week operating log; no real organisation or personal records..

Deterministic three-way matching: 4 minutes/item + 6 upkeep hours/month. Evidence: Reported as measured.

One-off setup: 24 hours. Waiting: Not estimated hours/item, excluded from active effort.

Monthly effort = items x total active minutes / 60 + upkeep. Released capacity = baseline - option effort. Financial costs are unestimated. Capacity release is not cash savings.

Conditions for proceeding

Permitted data use: reported. Permission reported by the respondent; reconfirm for the proposed processing.

Accountability: reported. Accounts payable lead

Data and delivery: reported. Access and delivery capacity reported as available.

Error control and recovery: reported. Exact matching and tolerance checks flag exceptions. An independent finance reviewer approves; the original records and reversal path are retained.

Conditions for proceeding (continued)

Action boundary: reported. Act only after a person approves each case. Impact: Financial records, commitments or payments. Separate extraction, deterministic reconciliation, approval and payment. Preserve source records and independent review.

Bounded comparison

Owner: Accounts payable lead. Review date: 2026-11-30.

Success: Detect all seeded material mismatches without increasing false holds, with less total review effort.

Stop or redesign: Stop for any missed material mismatch, missing approval or unreconciled total.

Data and systems: Structured invoices, approved timesheets and contracted rates; no payment credentials..

Plausible failure: A duplicate or incorrect amount is approved for payment..

Set a scope, sample and budget cap with the owner before starting. No sample size or error threshold here constitutes assurance.

Capacity reinvestment plan

Intended use: Investigate recurring supplier discrepancies and improve intake and exception rules.

Accountable role: Finance operations manager. Planned allocation: 40 hours/month.

Effectiveness measure: Fewer recurring discrepancies, false holds and late resolutions.

Protect time for better decisions and feedback, and track whether the intended outcome improves.

Measure capacity released, time actually reallocated and outcomes separately. Reinvestment uses released capacity; it is not an additional saving.

Method and limitations

Workflow Decision Map v2.1 is a practical synthesis, not a certification. Self-reported conditions require reconfirmation by the organisation. Unknowns are not treated as permission or evidence. This report does not authorise a pilot. Every input in this example is invented; there are no measured client results.

Method: <https://www.maliwansavage.info/ai-automation-audit/methodology>

Background: <https://www.maliwansavage.info/ai-blog/ai-opportunity-assessment-prioritisation>

Talent: candidate evidence packs and shortlist decisions

Defer or redesign this proposal

Resolve the blocking condition or narrow the design before using it in operations.

PROPOSED TREATMENT BY TASK

1. Check completeness of application records

2. Summarise role-relevant evidence with source links

3. Decide who progresses to the shortlist

Rules-based automation

AI assistance to test

Human decision

MONTHLY EFFORT / ACTIVE WORK + UPKEEP

Current process



90 h

Structured evidence checklist



64 h

AI-assisted option



36 h

54 h

Modelled release versus today

28 h

Additional release versus the simpler option

Deferred proposal: capacity is conditional, not committed.

OUTCOME: Evidence accurately traceable to applications (% of statements) | Baseline 95 | Simpler 98 | AI 99 | Threshold ≥ 98 . Reported as measured.

Permitted data use

Reported - reconfirm

Accountability

Reported - reconfirm

Data and delivery

Reported - reconfirm

Error control and recovery

Reported - reconfirm

Action boundary

Blocked

CAPACITY REINVESTMENT

Review difficult cases and improve role criteria and feedback with hiring managers.

The decision and its basis

Action boundary: Redesign the scope: keep consequential actions and decisions behind individual human approval. Test preparation or exception detection first; this diagnostic does not assess autonomous high-consequence decisions. Potential benefit does not override this condition.

The modelled AI capacity advantage over the simpler option is 28 hours per month, before setup effort and financial costs.

Time estimates are supporting information. The quality or service outcome must be tested directly.

Capacity figures describe a scenario only. They are not a benefit available to commit while the proposal is blocked.

Outcome comparison

Evidence accurately traceable to applications (% of statements). Baseline: 95. Threshold: at least 98.

Simpler: 98 (meets). AI: 99 (meets).

Evidence: Reported as measured. Invented matched comparison, including exceptions. These are scenario inputs, not actual measurements.

One measure does not establish acceptable quality, fairness or control on its own. Check difficult cases and the stated stop criteria.

Team comparison plan

Context: Talent. Unit of work: applications.

Authority: Act without approval for each case. People's access to employment or other opportunities.

Scope: Use synthetic applications with equivalent evidence in different formats. Check omissions and unequal treatment; an evidence metric alone cannot establish selection fairness.

Challenge cases: Use permitted or synthetic applications with equivalent evidence in varied formats. Check omissions, unsupported inferences and unequal treatment; review every progression or rejection decision.

Workflow boundary

Starts: An application arrives for an approved role

Finished: A shortlist is sent to the recruiter after the system excludes lower-ranked applications

Reported incident: Recruiters spend time assembling evidence. The proposal also automatically excludes lower-ranked applicants.

Primary outcome: quality. Main friction: rework. Process: clear.

Assumptions and calculation

Volume: 300 items/month. Current active effort: 18 minutes/item. Baseline: Reported as measured. Source: Invented fixture representing a four-week operating log; no real organisation or personal records..

Structured evidence checklist: 12 minutes/item + 4 upkeep hours/month. Evidence: Reported as measured.

AI: 2 preparation/execution + 3 review + 1 expected rework minutes/item, plus 6 upkeep hours/month. Evidence: Reported as measured.

One-off setup: 24 hours. Waiting: Not estimated hours/item, excluded from active effort.

Monthly effort = items x total active minutes / 60 + upkeep. Released capacity = baseline - option effort. Financial costs are unestimated. Capacity release is not cash savings.

Review sensitivity

2 review minutes/item: 31 monthly hours; AI advantage over the simpler option: 33 hours.

3 review minutes/item: 36 monthly hours; AI advantage over the simpler option: 28 hours.

4 review minutes/item: 41 monthly hours; AI advantage over the simpler option: 23 hours.

With other inputs fixed, the capacity comparison is equal at 8.6 review minutes/item.

Conditions for proceeding

Permitted data use: reported. Permission reported by the respondent; reconfirm for the proposed processing.

Accountability: reported. Talent acquisition lead

Data and delivery: reported. Access and delivery capacity reported as available.

Error control and recovery: reported. Source checks and an audit log have been tested, but the proposed automatic exclusion still removes human review for rejected applicants.

Action boundary: blocked. Redesign the scope: keep consequential actions and decisions behind individual human approval. Test preparation or exception detection first; this diagnostic does not assess autonomous high-consequence decisions.

Bounded comparison

Owner: Talent acquisition lead. Review date: 2026-11-30.

Success: At least 98% traceable statements, with every progression decision made by an accountable recruiter.

Stop or redesign: Stop for unsupported inferences, unequal treatment or any automated exclusion from consideration.

Data and systems: Approved role criteria and permitted application evidence; no real candidate data in this fixture..

Plausible failure: Unsupported inferences or automatic exclusion of a suitable candidate..

Set a scope, sample and budget cap with the owner before starting. No sample size or error threshold here constitutes assurance.

Capacity reinvestment plan

Intended use: Review difficult cases and improve role criteria and feedback with hiring managers.

Accountable role: Talent acquisition lead. Planned allocation: 15 hours/month.

Effectiveness measure: Fewer evidence omissions and better documented, consistently applied human decisions.

This proposal is deferred. Treat the reinvestment allocation as a contingent idea, not committed capacity.

Measure capacity released, time actually reallocated and outcomes separately. Reinvestment uses released capacity; it is not an additional saving.

Method and limitations

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Background: <https://www.maliwansavage.info/ai-blog/ai-opportunity-assessment-prioritisation>