Right Prompt, *Right Task*

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The Diagnostic

Example report: extract

Based on a real Diagnostic, with details changed to protect the client.

Prepared for: a building maintenance firm with about 20 staff
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Contents

This extract shows 2 parts of a real Diagnostic report. Every section of the full report is listed below, with the parts included here marked.

Section of the full report	In this extract
Executive Summary	Full report only
1. Current AI Adoption Level	Full report only
2. Blocker Diagnosis	Full report only
3. Process Opportunity Analysis: 6 processes mapped	Full report only
Process 1: Invoicing and Job Completion	**Included**
Process 2: Technician Job Notes	Full report only
Process 3: Customer Communication and Status Updates	Full report only
Process 4: Compliance Renewal Tracking	Full report only
Process 5: Quoting and Template Generation	Full report only
Process 6: Job Scheduling and Dispatch	Full report only
4. Summary: AI Readiness at a Glance (shortened here)	**Included**
5. Recommended Development Pathway	Full report only
6. What Happens After Your Diagnostic	Full report only

At a Glance

From section 4 of the full report, shortened to the firm's position, its main blocker and the recommended next step.

Where the firm stands	Level 101: Tool Awareness. Individual experimentation, no governance framework.
Main blocker	Workflow Gap: high-volume manual processes not yet redesigned for AI integration.
Recommended next step	Tailored AI Productivity Workshop for all staff, including development of an AI Fair Use Policy and mapping of the first automation targets.

One Process in Full: Invoicing and Job Completion

From section 3 of the full report: 1 of the 6 processes mapped, with its 3 lists and estimated saving.

Current state: When a technician completes a job and sets it to ready, the office team must gather the job information, verify it against the technician's notes, populate an invoice template, and email it to the client. With about 300 jobs cycling monthly, this is high-volume, pattern-based document generation. The director identified this as the one change he would most like to make.

Priority	Task	Action
Automate Now	Invoice drafts generated from completed job data. An estimated 90 to 95% of the content is standard.	High value
Automate Now	Follow-up on jobs marked complete with no invoice sent within 24 hours.	High value
Needs a Person Checking	Invoice checks before anything is sent, particularly for non-standard jobs or complex installations. AI drafts; a person approves.	AI assists
Leave Alone	Pricing decisions, credit terms, and payment dispute resolution. These require commercial judgement and customer relationship awareness.	Human only

Estimated saving: Recovering an estimated 10 to 15 hours per week of office time currently spent on invoice creation and chasing. The follow-up check targets the 5 to 10% of items the director estimates slip through the cracks.

The full report goes on to cover the remaining sections, worked out from the client's own figures.

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