

DEMONSTRATION REPORT

AI audit of your company

A full example of deep AI diagnostics
across all 15 company departments.

PREPARED FOR

Company / contact person

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A deep AI audit of every department (single methodology).

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SAMPLE DEPARTMENT AUDIT

AI in the Marketing dept

Implementation plan for a 50–500-person company:
processes, AI agents, stack, KPIs, risks and roadmap.

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01 Executive summary

The goal of adopting AI in marketing is to turn the department from a set of manual tasks into a managed system in which research, content, creatives, advertising, CRM communications and analytics are supported by AI tools and agents.

Area	What changes	Expected impact
Research	Competitors, market, reviews and trends are analyzed regularly and to a template	Hypotheses and strategy adjustments emerge faster
Content	Content is produced like a factory: one idea becomes dozens of formats	Growth in speed and volume without a proportional increase in the team
Performance	Creatives, ads, hypotheses and campaign analysis are accelerated by AI	More tests, faster shutdown of weak campaigns
CRM	The database is segmented, emails and sequences are personalized	Higher conversion and retention
Analytics	Reports and conclusions are prepared automatically	Decisions are made faster

Key principle: do not adopt AI in the abstract, but tie it to specific processes, KPIs, owners and quality-control rules.

02 Structure of the Marketing department

Function	Responsibility	AI focus
Head of Marketing / CMO	Strategy, budget, KPIs, priorities	AI roadmap, dashboard, impact control
Brand Manager	Positioning, brand, tone of voice	Brand Guardian, messaging matrix
Performance Marketer	Google, Meta, TikTok, LinkedIn Ads	Hypotheses, creatives, campaign analysis
Content Manager	Articles, newsletters, social media, landing pages	Content factory, editing, repurposing
SMM Manager	Social media, community, publications	Content plan, replies, social listening
Designer / Creative Producer	Banners, video, visuals	AI creatives, adaptations, video
SEO Specialist	Search optimization	Clusters, briefs, content gaps, GEO/AEO
CRM / Email Marketer	Newsletters, sequences, segments	Personalization, nurture, reactivation
Marketing Analyst	Reports, CAC, CPL, ROMI	AI dashboards, anomaly detection, summaries
Marketing Ops	CRM, automations, integrations	Integration of LLM, CRM, Ads, BI, knowledge bases

03 AI process map

Area	Processes	AI result
Research	market, competitors, reviews, social trends	weekly research memo and list of hypotheses
Strategy	ICP, JTBD, positioning, messaging	a single messaging matrix for channels and segments
Content	plan, articles, posts, video, emails	content factory and repurposing
SEO / GEO	keywords, content gaps, AI-search visibility	briefs, FAQ, schema, optimization for AI answers
Performance	ads, creatives, landing pages, tests	more hypotheses and faster budget optimization
Creative	banners, video, avatars, voiceover	mass production of variants
CRM	segmentation, nurture, upsell, reactivation	personal sequences and triggers
Analytics	dashboards, reports, forecasts, anomalies	automatic conclusions and actions
Brand control	checking style, promises, risks	fewer errors and less chaos in communication

04 Market and audience research

AI is used for the regular collection and structuring of information: competitor changes, new offers, reviews, search demand, social-media discussions, customer questions and reasons for refusal.

Process	How AI is used	Tools
Market analysis	collecting trends, categories, new products and shifts in demand	ChatGPT, Claude, Gemini, Perplexity
Competitor analysis	comparing sites, offers, prices, ad messaging	Similarweb, Semrush, Ahrefs, Crayon
Review analysis	clustering pains, expectations, objections and triggers	ChatGPT, Claude, Brandwatch, Sprinklr
Search demand	query clusters, seasonality, intent, content gaps	Semrush, Ahrefs, Surfer SEO, Clearscope
Audience	ICP, JTBD, segments, purchase motives	ChatGPT, Claude, SparkToro, Audiense
Social listening	mentions of the brand, competitors, trends, negativity	Brandwatch, Talkwalker, Sprout Social

Weekly AI workflow

- Collect changes on competitors' sites and in their advertising.
- Compare offers, prices, lead magnets, landing pages and creatives.

- Identify new customer pains from reviews, comments and inquiries.
- Formulate 5–10 new marketing hypotheses.
- Hand the hypotheses to the performance, content and CRM teams.

05 Positioning, ICP and messaging

Document	What it contains	How AI helps
Brand Book Lite	mission, positioning, tone of voice, forbidden phrasing	generation and review of communications
ICP Matrix	segments, pains, triggers, barriers, offers	campaign personalization
Messaging Matrix	key messages for each segment and channel	a single communication logic
Objection Map	customer objections and responses	support for sales, advertising and landing pages
Competitor Positioning Map	differences from competitors	building comparative campaigns
Campaign Strategy Brief	goal, audience, offer, channels, KPI	standardizing campaign launches

06 Content marketing and the AI content factory

The content factory is a process in which one strategic topic is turned into a set of materials for different channels: SEO, social media, newsletters, video, landing page, advertising and FAQ.

Process	What the human does	What AI does
Topic selection	sets priorities and strategy	suggests topics based on ICP, SEO and trends
Research	checks sources and facts	gathers theses and structure
Draft	approves the meaning	writes the first version
Editing	checks accuracy and style	shortens, strengthens, adapts
Design	approves the visual logic	creates layout and format ideas
Publishing	controls the calendar	prepares channel adaptations
Analysis	makes the decision	gathers metrics and conclusions

Example of unpacking a single topic

Format	Count
SEO article	1
LinkedIn / Facebook post	3-5
Instagram carousel	2
Reels / TikTok / Shorts script	3-5
Email newsletter	2
FAQ block	1
Landing section	1
Ad creatives	10-20 variants

07 SEO, GEO and AEO

SEO is complemented by optimization for AI answers: the brand must be clear not only to the search engine but also to systems that generate a short answer for the user.

Process	AI optimization	Tools
Keyword research	automatic clustering of queries	Semrush, Ahrefs
Content gap analysis	finding missing topics and pages	Semrush, Surfer SEO
SEO brief	article structure, H1-H3, intent, FAQ	Surfer SEO, Clearscope
On-page SEO	meta tags, internal links, readability	Surfer SEO, Semrush
Technical SEO	errors, duplicates, indexing	Screaming Frog, Semrush
GEO / AEO	visibility in AI search and AI answers	Profound, Peec AI, Semrush AI
FAQ / Schema	structured data and answers to frequent questions	ChatGPT, SEO tools

08 Performance marketing

Stage	AI action	Result
Brief	creating a campaign brief by product, audience and goal	a single campaign start
Hypotheses	20–50 advertising hypotheses	more tests
Angles	angles: pain, benefit, status, fear, price, urgency	variety of messaging
Copy	ad and CTA variants	fast preparation of tests
Visuals	ideas for banners, video, hooks	mass creatives
Landing	structure and block variants	better conversion
Analysis	CPL, CAC, CTR, CVR, ROAS, anomalies	faster decisions
Iteration	what to shut down, scale, rewrite	cycle of improvements

Performance AI must not spend budget on its own without rules. A human approves the strategy, limits, forbidden offers and final scaling decisions.

09 Creative production

Task	AI capability	Tools
Banners	fast variants for formats and audiences	Canva AI, Firefly, AdCreative.ai
Images	concepts, illustrations, moodboards	Midjourney, Firefly, DALL-E
Video	short clips, b-roll, animations	Runway, Pika, CapCut AI
Talking avatar	video with an AI speaker	HeyGen, Synthesia, D-ID
Voiceover	voiceover and voice variants	ElevenLabs, PlayHT
Editing	cutting, subtitles, repurposing	Descript, OpusClip, CapCut AI
Brand consistency	checking brand compliance	Adobe GenStudio, Frontify, Writer

10 Email, CRM and lifecycle marketing

Scenario	AI function	Metric
Welcome sequence	a personal series after registration	activation rate
Abandoned form	return after an unfinished application	form completion rate
Lead nurturing	nurturing by interests and funnel stage	MQL-to-SQL
Reactivation	reactivating the old database	reactivation rate
Upsell / cross-sell	the next product based on customer behavior	upsell revenue
Event reminders	reminders and personal arguments	attendance rate
Review request	requesting a review after an event or purchase	review conversion
Churn prevention	finding customers at risk of leaving	retention rate

11 Social media and community

Process	AI optimization	Tools
Content plan	ideas for the month by segments and products	ChatGPT, Claude, Jasper
Posts	text variants and tone-of-voice adaptation	ChatGPT, Writer
Comments	draft replies and classification of negativity	Sprout Social, Hootsuite AI
Monitoring	mentions of the brand, competitors and trends	Brandwatch, Talkwalker
Short video	scripts, hooks, subtitles and editing	OpusClip, CapCut AI, Runway
Influencers	search and relevance assessment	Modash, HypeAuditor

12 Landing pages and CRO

Element	What AI checks
First screen	whether it is clear what is being sold and for whom
CTA	whether the next step is visible and specific enough
Social proof	whether there are reviews, cases, numbers, logos
Objections	whether the customer's fears are addressed
Price	whether the value is explained
Form	whether it is too long and complex
Mobile version	whether there is any conversion loss

13 Marketing analytics

Report block	Content
Spend	spend by channels, campaigns and days
Leads	number of leads and quality
CPL / CAC	cost per lead and per customer
Conversion	conversions by funnel stage
Winners	best campaigns, audiences, ads, landing pages
Losers	weak campaigns and reasons
Anomalies	sharp deviations in CPL, CTR, CVR, spend
Actions	what to shut down, strengthen, check, test

Recommended format: a short daily AI summary for the Head of Marketing and a weekly executive summary for the CEO.

14 Marketing knowledge base

Section	Content
Products	descriptions, prices, advantages, limitations
ICP	customer segments, pains, triggers, barriers
Competitors	competitors, differences, prices, offers
Brand voice	communication style, examples and anti-examples
Offers	promotions, lead magnets, terms
Cases	cases, reviews, results
Objections	objections and responses
Legal restrictions	what cannot be promised
Campaign history	past campaigns, creatives and results
FAQ	frequent customer questions

15 AI agents for the Marketing department

Agent	Task	Output
Market Research Agent	monitoring the market, competitors, reviews and trends	weekly research memo
Content Strategy Agent	preparing the content plan	topics, formats, CTAs, KPIs
Creative Production Agent	creating creative variants	copy, hooks, prompts, scripts
Performance Optimization Agent	analyzing campaigns	what to shut down, strengthen, test
CRM / Lifecycle Agent	personalizing communications	sequences, segments, triggers
Brand Guardian Agent	checking style and risks	comments and a publishing block on violations

16 Recommended AI stack

Category	Tools
LLM / general-purpose assistant	ChatGPT Enterprise, Claude Team, Gemini, Microsoft Copilot
Content	Jasper, Writer, Copy.ai
Design	Canva AI, Adobe Firefly
Video	Runway, Pika, Synthesia, HeyGen, Descript, OpusClip
SEO	Semrush, Ahrefs, Surfer SEO, Clearscope
Ads	Google Ads AI, Meta Advantage+, AdCreative.ai
CRM / Marketing automation	HubSpot, Salesforce MC, Klaviyo, Mailchimp, ActiveCampaign
Analytics	GA4, Looker Studio, Power BI, Tableau
Social listening	Brandwatch, Talkwalker, Sprout Social
CRO	Optimizely, VWO, Unbounce, Instapage
Knowledge base	Notion AI, Confluence AI, Guru, Glean
Automation	Zapier AI, Make, n8n

17 AI marketing KPIs

Area	KPI
Productivity	campaigns per marketer, launch speed
Content	content units per month, cost per content unit
Creatives	number of tested variants, CTR, hook rate
Performance	CPL, CAC, ROAS, ROMI, CVR
SEO	organic traffic, rankings, leads from organic
Email	open rate, CTR, conversion, unsubscribe
Social	ER, reach, saves, comments, shares
CRO	landing-page conversion rate
Analytics	report preparation speed, number of anomalies
Quality	brand compliance, factual accuracy, approval rejection rate
Economics	hours saved, lower production cost, revenue growth

18 Risks and control

Risk	Control
Hallucinations	fact-checking and mandatory sources for factual statements
Brand voice violations	brand guideline and Brand Guardian Agent
Legal errors	legal checklist and approval flow
Poor-quality content	a human editor and quality criteria
Uniform style	a library of examples, anti-examples and different creative angles
Data leakage	corporate AI accounts, ban on sensitive data, DPA
Advertising errors	budget limits, manual campaign approval
Over-automation	a human approves the strategy and critical decisions
Growth of hidden costs	usage dashboard, limits, cost owner

19 90-day implementation roadmap

Period	Actions	Result
1–2 weeks	describe processes, tools, budgets, bottlenecks and AI use cases	marketing AI audit
2–4 weeks	assemble the knowledge base: product, ICP, FAQ, objections, brand voice	a ready knowledge base
4–6 weeks	launch 5 pilots: content factory, ads generator, campaign analyst, SEO assistant, email personalization	first measurable effects
6–10 weeks	integrate CRM, Ads, GA4, BI, knowledge base and LLM	semi-automatic workflows
10–12 weeks	approve AI policy, approval flow, KPIs, owners and scaling	a managed marketing AI system

20 Implementation priorities

No.	Process	Why
1	Content plan and posts	fast to adopt, few integrations
2	Ad copy	immediately increases the number of hypotheses
3	Campaign analysis	saves time for the CMO and performance team
4	Email segmentation	affects conversion and retention
5	SEO briefs	accelerates organic growth
6	Brand Guardian	reduces risks and increases consistency

21 Final target model

Within 90 days the Marketing department should have not just a set of AI tools, but a managed operating system: a knowledge base, a prompt library, AI agents, integrations with CRM/Ads/BI, quality control and transparent KPIs.

Component	Target state
Knowledge base	an up-to-date base of product, audience, competitors, brand and campaigns
AI workflows	standardized processes for research, content, ads, CRM and analytics
AI agents	agents for research, content, creatives, performance, CRM and brand control
Governance	data rules, approvals, limits and accountability
Measurement	before/after KPIs, impact dashboard and regular review

22 Sources and reference points

The document draws on both practical AI-transformation templates and open market reference points regarding the use of GenAI in marketing, customer experience, performance content and AI-search visibility.

Source	Use
McKinsey – The state of AI	reference points on GenAI adoption areas and impact in marketing & sales
Adobe – AI and Digital Trends / GenStudio	AI-powered workflows, content supply chain and brand governance
Salesforce – AI marketing tools	categories of AI tools for campaigns, personalization and optimization
Business Insider – AI-search / GEO	context on the growth of brand visibility in AI search and LLM-driven queries

This is a demonstration example of a deep audit of **one** department. A full AI audit covers every department in your company. Request one at auditari.com – we'll tailor the audit to your structure.

SAMPLE DEPARTMENT AUDIT

AI in the Sales dept

Implementation plan for a 50–500-person company:
processes, use-cases, AI agents, KPIs, risks and roadmap.

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Company / contact person

01 Role of the Sales department

The Sales department turns market interest into revenue: lead generation and qualification, running deals, preparing proposals and contracts, closing and growing accounts. It is a process with a large volume of routine, repetitive actions (CRM data entry, document preparation, call analysis), where AI delivers the biggest and fastest impact.

02 AI transformation goals

Goal	What changes	Impact
Response speed	leads are processed in minutes, not hours	higher lead → meeting conversion
CRM data quality	records are filled automatically from calls and emails	accurate forecasts and analytics
Productivity	routine (notes, proposals, follow-ups) is automated	more time for live selling
Predictability	AI scores close probability and deal risks	a managed pipeline
Scalability	growth without proportional hiring	lower CAC

Key principle: AI does not make decisions for the rep and does not talk to the client blind. It prepares, analyzes and suggests – the decision and the final communication stay under human control.

03 Typical department structure

Role	Responsibility	AI focus
Head of Sales / CRO	strategy, plan, pipeline, team	AI forecast, dashboard, coaching insights
SDR (Sales Development)	lead generation, qualification, meetings	scoring, sequences, research
Account Executive	running and closing deals	prep briefs, proposals, follow-up
Account Manager / CSM	retention, upsell, cross-sell	health score, next-best-action
Sales Operations	CRM, processes, reporting, integrations	automations, data hygiene, BI
Sales Enablement	scripts, training, materials	knowledge base, playbooks, call analytics

04 Process map (sales funnel)

Stage	Processes	AI result
Lead generation	sourcing, enrichment, inbound requests	a prioritized list of scored leads
Qualification	BANT/MEDDIC, first touch	auto-qualification and routing
Discovery / meetings	preparation, running, notes	prep briefs and auto minutes
Proposal	proposals, quotes, contract	documents generated from a template
Negotiation	objections, alignment	prompts and an Objection Map
Closing	contract, invoice, signature	auto-fill and deadline control
Post-sale	onboarding, upsell, renewal	next-best-action triggers

05 Core process map

Process	Today	How AI helps	Tools	Impact	Prio
Inbound lead handling	manual, with delay	instant scoring and routing	HubSpot/SF AI, ChatGPT	+conversion	High
CRM data entry	rep does it manually	auto from calls and emails	Gong, Fireflies, tl;dv	+accuracy, -time	High
Meeting preparation	manual research	auto brief on the client	ChatGPT, Clay, Apollo	time savings	High
Proposals and contracts	templates by hand	generated from deal data	PandaDoc AI, ChatGPT	faster cycle	High
Follow-up emails	irregular	auto drafts from context	Lavender, ChatGPT	+replies	Med
Lost-deal analysis	rarely/subjective	AI breakdown of causes	Gong, ChatGPT	+win rate	Med
Revenue forecast	manual in spreadsheets	AI deal scoring	Einstein, Clari	more accurate forecast	Med

06 Detailed AI use-case map

Each use case is described in a single format: process, problem, AI solution, tools, integrations, human role, KPI, risks, complexity and priority.

Use case 1 · Lead scoring and instant routing

Process: inbound leads from forms, ads and chat land in a queue

Problem: processing is delayed; the best leads get lost among weak ones

AI solution: AI scores a lead by profile, behavior and intent signals and instantly assigns an owner and priority

Tools: HubSpot/Salesforce AI, Clay, 6sense, ChatGPT

Integrations: CRM, forms, ad accounts, chat, Slack

Human role: confirms qualification and runs the communication

KPI: lead response time, lead → meeting rate

Risks: model bias — rule-based control and review of exceptions

Complexity: Medium · **Priority:** High

Use case 2 · Auto call minutes and CRM entry

Process: after a call the rep writes notes and updates the record manually

Problem: 20–40% of data never reaches the CRM; time is lost

AI solution: call transcription, auto summary, next steps and CRM field updates

Tools: Gong, Fireflies, tl;dv, ChatGPT

Integrations: telephony / Zoom / Meet, CRM

Human role: checks and confirms the summary before saving

KPI: CRM data completeness, time on admin tasks

Risks: recording privacy – consent and a retention policy

Complexity: Medium · **Priority:** High

Use case 3 · Proposal and contract generation

Process: the rep assembles the proposal/contract from templates by hand

Problem: slow, error-prone, inconsistent wording

AI solution: document generated from deal data and the playbook + a check of risky wording

Tools: PandaDoc AI, ChatGPT, DocuSign

Integrations: CRM, document storage, e-sign

Human role: approves the price, terms and final document

KPI: proposal preparation time, deal cycle speed

Risks: legal inaccuracies – mandatory lawyer review

Complexity: Medium · **Priority:** High

Use case 4 · Pre-meeting prep brief

Process: before a meeting the rep looks up client info across various sources

Problem: slow and inconsistent; weak prep lowers conversion

AI solution: auto brief on the company, contact, interaction history, triggers and likely objections

Tools: ChatGPT, Clay, Apollo, LinkedIn

Integrations: CRM, calendar, email

Human role: uses the brief and runs the meeting

KPI: show rate, meeting→opportunity rate

Risks: stale data – verify key facts

Complexity: Low · **Priority:** High

Use case 5 · Lost-deal analysis and forecast

Process: loss reasons are logged rarely and subjectively; the forecast is manual

Problem: no systematic understanding of losses; an inaccurate forecast

AI solution: AI analyzes calls/emails/stages, clusters loss reasons and estimates deal close probability

Tools: Gong, Clari, Salesforce Einstein, ChatGPT

Integrations: CRM, conversation intelligence, BI

Human role: makes decisions on deals and strategy

KPI: win rate, forecast accuracy

Risks: false conclusions on small data – human review

Complexity: High · **Priority:** Medium

07 AI agents for the department

Agent	Task	Inputs	Output	Integrations
Lead Qualification Agent	lead scoring and routing	leads, profile, behavior	priority + owner	CRM, forms, Slack
Meeting Notetaker Agent	minutes and CRM updates	call recording	summary + CRM fields	Zoom, CRM
Proposal Agent	proposal/contract generation	deal data, playbook	document draft	CRM, PandaDoc
Follow-up Agent	email drafts and reminders	deal history	email + task	CRM, email
Deal Risk Agent	deal risk analysis	stages, activity, calls	risk score + actions	CRM, Gong
Forecast Agent	revenue forecast	pipeline, history	forecast + anomalies	CRM, BI

08 AI systems & tools

Category	Tools	Use for
LLM / assistant	ChatGPT Enterprise, Claude Team, Gemini	summaries, copy, analysis
Conversation intelligence	Gong, Chorus, Fireflies, tl;dv	calls, coaching, notes
Lead intelligence	Clay, Apollo, Clearbit, 6sense	enrichment, scoring, intent
CRM / automation	HubSpot, Salesforce, Pipedrive	records, tasks, workflow
Outreach / sequences	Outreach, Salesloft, Instantly, Lavender	sequences, emails
Documents / e-sign	PandaDoc, DocuSign	proposals, contracts, signature
Forecasting / BI	Clari, Salesforce Einstein, Looker Studio	forecast, pipeline health
Governance	enterprise accounts, DLP, policies	data security

09 Integrations

System	Role	What it gives
CRM (HubSpot / Salesforce)	data core	a single source of truth on deals
Telephony / Zoom / Meet	calls and meetings	a source of conversations to analyze
Email / calendar	communications	context for follow-up and prep
Conversation intelligence	conversation analysis	auto-fill and coaching
Document / e-sign	documents	a fast signing cycle
BI / dashboards	analytics	forecast and KPI control
Slack / Teams	notifications	instant signals on leads and risks

10 Department knowledge base

Section	What's stored
Product and pricing	descriptions, packages, discount policy
ICP and segments	customer profiles, pains, triggers
Sales playbook	stages, criteria, scripts
Objection map	objections and responses
Templates	proposals, contracts, emails, sequences
Cases and references	success stories, numbers, testimonials
Competitors	comparisons, battle cards
Prohibited promises	what cannot be guaranteed
Deal history	won / lost, reasons

11 KPIs & impact metrics

Area	KPI
Speed	lead response time, sales cycle length
Conversion	lead→meeting, meeting→opportunity, win rate
Productivity	deals/meetings per rep, time on admin tasks
Data quality	CRM completeness, forecast accuracy
Revenue	revenue, ARPU, upsell/cross-sell, CAC
Retention	churn, renewal rate
AI quality	summary accuracy, share of accepted AI drafts

12 Risks & constraints

Risk	Control
Call-recording privacy	consent, retention policy, access limits
False AI conclusions	human-in-the-loop, fact-checking
Errors in proposals/contracts	mandatory review, approved templates, e-sign
Outreach spam	limits, personalization, compliance (GDPR / CAN-SPAM)
Customer data leakage	enterprise accounts, no sensitive data, DLP
Over-automation	a human runs communication and closes deals
Dependence on CRM quality	data hygiene, required fields

13 90-day implementation plan

Period	Actions	Result
1-2 weeks	audit of sales processes, CRM, calls and bottlenecks	an AI use-case map
2-4 weeks	assemble the knowledge base: product, ICP, playbook, objections, templates	a ready knowledge base
4-6 weeks	pilots: lead scoring, call notetaker, proposal generator	first measurable results
6-10 weeks	integrations CRM + telephony + BI, sequences, forecast	semi-automated workflows
10-12 weeks	policies, KPIs, roles, scaling	a managed AI sales system

14 Quick wins (first 30–60 days)

Initiative	Why it's fast
Auto call minutes and CRM entry	minimal integrations, instant time savings
Inbound lead scoring	works on existing CRM data
Templated proposals and emails via AI	ready templates + LLM
Pre-meeting prep briefs	requires no deep integrations
Auto follow-up reminders	simple rules + drafts

15 Mid-term initiatives

Initiative	What it gives
Personalized outreach sequences with AI	more quality touches, a higher pipeline
Coaching based on call analysis	growth in win rate and conversation quality
Lost-deal analysis + battle cards	a systematic understanding of losses
Health score and next-best-action	better retention and upsell

16 Complex but high-value initiatives

Initiative	What it gives
Company-wide AI forecast and pipeline health	predictability and control
Autonomous agents with end-to-end integrations	scale without growing routine
Dynamic pricing and proposals	optimized margin and conversion
A single data layer (CRM + calls + product + BI)	a complete picture of the client

17 Summary roadmap

Initiative	Impact	Complexity	Prio	Timeline
Call notetaker + CRM	+data, -time	Medium	High	2–4 weeks
Lead scoring & routing	+conversion	Medium	High	2–4 weeks
Proposal generator	-deal cycle	Medium	High	3–5 weeks
Meeting prep	+show / opportunity	Low	High	1–2 weeks
Outreach sequences	+pipeline	Medium	Medium	4–6 weeks
Deal risk & forecast	+win rate	High	Medium	6–10 weeks
Autonomous agents	scale	High	Medium	10–12+ weeks

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SAMPLE DEPARTMENT AUDIT

AI in the Customer Support

Implementation plan for a 50–500-person company:
processes, use-cases, AI agents, KPIs, risks and roadmap.

PREPARED FOR

Company / contact person

01 Role of the Customer Support department

Customer support protects the revenue that sales earned: it handles inquiries in chat, email and by phone, resolves problems, brings customers back to the product and feeds the business signals about systemic failures. It is the most «assembly-line» department in the company: up to 60–70% of inquiries are typical and repetitive (order status, payment, setup, access), which is exactly why AI delivers the fastest measurable impact here – in weeks, not months.

02 AI transformation goals

Goal	What changes	Impact
Response speed	first reply in seconds 24/7, not in hours	lower FRT, higher CSAT
Deflection of typical inquiries	AI bot closes typical questions without an agent	30–50% of tickets without a human
Quality and consistency	answers rely on a single knowledge base	fewer errors and off-script replies
Agent productivity	routine (summaries, drafts, tags) is automated	lower AHT, more tickets per agent
Quality control	QA covers 100% of conversations instead of a 2–5% sample	systematic coaching, fewer escalations

Key principle: AI replies to the customer on its own only within approved scenarios and the knowledge base. Anything involving money, complaints, contract termination or non-standard cases is escalated to a human. An agent can always take over the dialog.

03 Typical department structure

Role	Responsibility	AI focus
Head of Support	strategy, SLA, budget, team	FRT/CSAT dashboards, escalation funnel
L1 agents	first line: typical inquiries, chat, email	AI drafts, knowledge-base suggestions
L2 / technical support	complex cases, bugs, integrations	auto-summaries of history, similar cases, logs
QA specialist	conversation quality scoring, scorecards	AI scoring of 100% of dialogs, anomaly sampling
Knowledge manager	knowledge base, macros, articles	auto-drafts of articles from resolved tickets
Support Ops	helpdesk, routing, reporting, integrations	AI-workflow setup, metrics monitoring

04 Process map (inquiry lifecycle)

Stage	Processes	AI result
Inquiry intake	chat, email, phone, messengers, forms	single queue, instant acknowledgment
Classification / routing	topic, language, priority, assignment	auto-tags and routing in 2–3 seconds
First response	typical questions, statuses, instructions	AI bot or draft for the agent
Escalation	handoff to L2, development, billing	auto-summary of the case, no re-telling
Resolution	diagnosis, fix, confirmation	suggestions from similar cases and the knowledge base
QA control	conversation scoring, feedback to agents	AI scoring of every conversation against a checklist
Root-cause analysis	why customers reach out in the first place	clusters of root causes for the product

05 Core process map

Process	Today	How AI helps	Tools	Impact	Prio
Typical questions (FAQ)	agent answers manually	AI bot answers from the knowledge base	Intercom Fin, Zendesk AI	–30–50% tickets	High
Ticket classification	manual or simple rules	auto topic, priority, sentiment	Zendesk AI, Freddy	routing in seconds	High
Agent replies	written from scratch or from macros	AI draft based on ticket context	Zendesk AI, ChatGPT	–20–40% AHT	High
Line-to-line handoff	agent re-tells the history	auto-summary of the ticket	Zendesk AI, Claude	faster escalation	High
Conversation QA	manual 2–5% sample	AI scores 100% against a checklist	Klaus, MaestroQA	full coverage	Med
Knowledge-base updates	episodic, manual	article drafts from tickets	Notion AI, Guru	up-to-date base	Med
Reporting and causes	manual exports	clustering of topics and trends	Claude, BI dashboards	fewer repeats	Med

06 Detailed AI use-case map

Each use case is described in a single format: process, problem, AI solution, tools, integrations, human role, KPI, risks, complexity and priority.

Use case 1 · First-line AI bot (chat and email)

Process: typical inquiries: order status, payment, access, instructions

Problem: agents spend 50–70% of their time on the same questions; the queue grows at night and on weekends

AI solution: a bot built on the company knowledge base answers 24/7, performs simple actions (status, links, password reset) and hands complex cases to an agent with full context

Tools: Intercom Fin, Zendesk AI Agents, Freshdesk Freddy

Integrations: helpdesk, knowledge base, CRM, billing (read-only)

Human role: approves scenarios, reviews low-scored dialogs, takes over escalations

KPI: deflection rate, FRT, CSAT of bot dialogs

Risks: made-up answers — strict grounding in the knowledge base and a «talk to a human» button

Complexity: Medium · **Priority:** High

Use case 2 · Auto-classification and ticket routing

Process: every inquiry needs tagging, priority scoring and assignment to an agent

Problem: manual classification is slow and inconsistent; urgent cases wait in the general queue

AI solution: AI determines topic, language, product, sentiment and urgency; VIP and «hot» complaints go to a priority queue for the right team

Tools: Zendesk Intelligent Triage, Freshdesk Freddy, Claude API

Integrations: helpdesk, CRM (customer segment), Slack alerts

Human role: Support Ops maintains the rules, reviews routing errors once a week

KPI: time to assignment, classification accuracy, SLA breaches

Risks: wrong priority — safeguard rules for complaints and key accounts

Complexity: Low · **Priority:** High

Use case 3 · AI reply drafts for agents

Process: an agent reads the ticket, looks for the answer in the knowledge base and writes the text

Problem: slow; quality depends on agent experience; new hires take months to ramp up

AI solution: AI proposes a ready draft based on the ticket history, knowledge base and brand tone; the agent edits and sends it in one click

Tools: Zendesk AI Copilot, Intercom Copilot, ChatGPT Enterprise

Integrations: helpdesk, knowledge base, product catalog

Human role: the agent always reviews and confirms the answer before sending

KPI: AHT, share of accepted drafts, CSAT

Risks: blind acceptance of drafts — selective QA specifically of AI-assisted replies

Complexity: Low · **Priority:** High

Use case 4 · Auto-summaries of tickets and QA of 100% of conversations

Process: QA manually listens to/reads a sample of conversations; on escalation an agent re-tells the history

Problem: QA covers 2–5% of dialogs; handing off a case eats up 10–15 minutes per ticket

AI solution: AI generates a summary of every ticket (problem, steps, status) and scores 100% of conversations against a QA checklist: greeting, accuracy, empathy, compliance

Tools: Klaus (Zendesk QA), MaestroQA, Claude API

Integrations: helpdesk, telephony (transcripts), QA scorecards

Human role: the QA specialist calibrates checklists and reviews anomalies instead of listening to everything

KPI: QA coverage, internal quality score, number of escalations

Risks: formal scoring — monthly calibration of AI scores against human ones

Complexity: Medium · **Priority:** High

Use case 5 · Root-cause analysis of inquiries

Process: reports show the number of tickets, but not «why customers reach out»

Problem: the same product problem generates hundreds of tickets for months; the product team doesn't know about it

AI solution: AI clusters tickets by root cause, calculates the cost of each cluster in support hours and produces a top-10 for product and engineering

Tools: Claude API, Zendesk Explore, BI (Looker Studio)

Integrations: helpdesk, product analytics, Jira (bugs)

Human role: the Head of Support prioritizes clusters together with the product team

KPI: tickets per 100 customers, share of repeat inquiries

Risks: false clusters on small samples — manual validation before handing off to the product team

Complexity: High · **Priority:** Medium

07 AI agents for the department

Agent	Task	Inputs	Output	Integrations
First-line Bot Agent	typical inquiries 24/7	knowledge base, customer data	answer or escalation	helpdesk, KB, CRM
Triage Agent	classification and routing	ticket text, segment	tags + priority + queue	helpdesk, Slack
Reply Copilot Agent	reply drafts	ticket, knowledge base	draft for the agent	helpdesk, KB
Summary Agent	summaries of tickets and calls	history, transcripts	digest for escalation	helpdesk, telephony
QA Scoring Agent	scoring 100% of conversations	dialogs, QA checklist	score + anomalies	helpdesk, QA tool
Insights Agent	root causes of inquiries	ticket corpus	clusters + report for the product	helpdesk, BI, Jira

08 AI systems & tools

Category	Tools	Use for
LLM / assistant	ChatGPT Enterprise, Claude Team, Gemini	drafts, summaries, analysis
Helpdesk AI	Zendesk AI, Intercom Fin, Freshdesk Freddy	bot, triage, copilot in tickets
Chatbots / no-code	Voiceflow, Botpress, Chatbase	scripted bots on the website and in messengers
Voice AI	Deepgram, ElevenLabs, telephony AI-IVR	call transcription, voice bot
QA analytics	Klaus (Zendesk QA), MaestroQA	conversation scoring, agent coaching
Knowledge base	Notion AI, Guru, Confluence AI	articles, macros, auto-updates
Translation	DeepL, built-in LLMs	multi-language support with one team
Governance	corporate accounts, DLP, policies	customer data security

09 Integrations

System	Role	What it gives
Helpdesk (Zendesk / Intercom / Freshdesk)	support core	single queue and inquiry history
CRM	customer profile	segment, plan, purchase history for the bot and agents
Knowledge base	source of answers	AI answers only from approved content
Telephony / voice	calls	transcripts for QA and summaries
Billing / back office	statuses and operations	the bot shows order or payment status
Jira / development tracker	bugs and features	escalation of technical cases with context
Slack / Teams	notifications	alerts on SLA, VIP complaints, anomalies

10 Department knowledge base

Section	What's stored
Product and plans	features, limits, prices, terms
Customer FAQ	typical questions and approved answers
Instructions / how-to	step-by-step setup and action scenarios
Known issues	current bugs, workarounds, statuses
Policies	refunds, compensation, SLA, warranties
Brand tone	how we address customers, what we don't say
Macros and templates	ready answers by scenario
Escalation matrix	who steps in and when
Forbidden promises	what the bot and agent cannot guarantee

11 KPIs & impact metrics

Area	KPI
Speed	FRT (first response), AHT (handling time), resolution time
Deflection	share of tickets closed by AI without an agent
Satisfaction	CSAT, NPS, ratings of bot dialogs
Effectiveness	FCR (resolved on first contact), repeat inquiries
Productivity	tickets per agent, queue coverage, SLA compliance
Economics	cost per ticket, cost per resolution
AI quality	bot answer accuracy, share of accepted drafts, escalation rate

12 Risks & constraints

Risk	Control
Made-up bot answers	answers only from the knowledge base, source citations, confidence threshold
Customer «stuck» in the bot	«talk to a human» button always available, auto-escalation after 2 failed attempts
Personal data leakage	PII masking, corporate accounts, DLP, DPA with vendors
Errors in money matters	refunds/compensation – humans only; the bot only informs
Quality drop at scale	QA of 100% of conversations, weekly anomaly review
Outdated knowledge base	KB owner, regular update cycle from fresh tickets
Team resistance	AI as an assistant, not a replacement; agent metrics aren't penalized during the pilot

13 90-day implementation plan

Period	Actions	Result
1–2 weeks	audit channels, inquiry topics, SLA and knowledge base; measure FRT/AHT/CSAT	AI use-case map + baseline metrics
2–4 weeks	collect and clean up the knowledge base: FAQ, instructions, policies, brand tone	knowledge base ready for AI
4–6 weeks	pilots: AI drafts for agents + auto-classification on part of the queue	first measurable impact on AHT
6–10 weeks	launch the first-line AI bot on limited scenarios + auto-summaries	deflection 15–30% without a CSAT drop
10–12 weeks	QA of 100% of conversations, dashboards, policies, expanded bot scenarios	a managed AI support system

14 Quick wins (first 30–60 days)

Initiative	Why it's fast
AI reply drafts for agents	built-in helpdesk feature, impact from day one
Auto-classification and ticket tags	works on the existing flow, no process changes
Auto-summaries of tickets on escalation	one prompt + integration, savings on every handoff
Bot for the top-20 FAQ	limited scope, quick launch on the knowledge base
Call transcription	ready APIs, immediately provides material for QA

15 Mid-term initiatives

Initiative	What it gives
Full AI bot with actions (status, refunds, access)	deflection 30–50% of typical inquiries
QA scoring of 100% of conversations + agent coaching	systematic growth of quality and CSAT
Auto-updates of the knowledge base from resolved tickets	the base stays current, the bot gets smarter
Multi-language support via AI translation	new markets without hiring native agents

16 Complex but high-value initiatives

Initiative	What it gives
Voice AI: voice bot and analysis of 100% of calls	automation of the phone channel
Proactive support based on product signals	inquiries are pre-empted before they appear
Closed loop «tickets → root causes → product»	–15–25% of inquiries thanks to fixes
Single data layer (helpdesk + CRM + product + billing)	full customer context in every dialog

17 Summary roadmap

Initiative	Impact	Complexity	Prio	Timeline
AI drafts for agents	–20–40% AHT	Low	High	1–2 weeks
Auto-classification and routing	faster SLA	Low	High	2–3 weeks
Auto-summaries of tickets	faster escalation	Low	High	2–3 weeks
First-line AI bot	–30–50% tickets	Medium	High	4–8 weeks
QA of 100% of conversations	+quality, +CSAT	Medium	Medium	6–8 weeks
Root-cause analysis	fewer inquiries	High	Medium	8–10 weeks
Voice AI and proactivity	scale	High	Medium	10–12+ weeks

This is a demonstration example of a deep audit of **one** department. A full AI audit covers every department in your company. Request one at **auditari.com** — we'll tailor the audit to your structure.

SAMPLE DEPARTMENT AUDIT

AI in Customer Success

Implementation plan for a 50–500-person company:
processes, use-cases, AI agents, KPIs, risks and roadmap.

PREPARED FOR

Company / contact person

01 Role of the Customer Success department

Customer Success is responsible for making sure the client gets value and stays: onboarding, product adoption, account health monitoring, QBR reports, contract renewals and expansion (upsell/cross-sell). In a 50–500-person company, CS is what retains the revenue that sales has already brought in: 5% growth in retention has a disproportionately larger effect on profit than 5% in new sales. At the same time, CSM work is overloaded with routine — pulling account data from different systems, preparing reports, manual health scores done «by feel» — and this is exactly where AI delivers the fastest effect: it spots churn signals earlier than a human and frees up time for real work with the client.

02 AI transformation goals

Goal	What changes	Impact
Early churn detection	health score is calculated automatically from product and communication data	risk is visible 60–90 days before renewal
Faster time-to-value	onboarding is guided by an assistant following a plan, not «however it goes»	client gets value in the first weeks
CSM productivity	QBRs, summaries and notes are prepared automatically	one CSM handles 1.5–2 times more accounts
Managed expansion	AI suggests the moment and reason for upsell	NRR growth without pressuring the client
Revenue predictability	renewal forecast based on health score	financial plan relies on data, not gut feel

Key principle: AI does not make decisions for the manager and does not talk to the client «blindly». It prepares, analyzes and suggests — decisions and final communication stay under human control.

03 Typical department structure

Role	Responsibility	AI focus
Head of CS	retention strategy, NRR/GRR, team	AI renewal forecast, risk dashboard
CSM (Customer Success Manager)	account portfolio, adoption, QBR	health score, auto-summaries, next-best-action
Onboarding Manager	launching new clients, time-to-value	onboarding plans, auto-reminders, checklists
Renewal / Account Manager	renewals, re-signing, pricing	renewal forecast, building the value case
CS Ops	processes, data, integrations, reporting	automations, data hygiene, BI
Support Liaison	link with support, escalations	auto-analysis of tickets, signals into health score

04 Process map (customer lifecycle)

Stage	Processes	AI result
Onboarding	kick-off, launch plan, training	personalized plan + automatic step tracking
Adoption	feature activation, team training	under-usage signals + prompts
Health monitoring	usage, tickets, NPS, communications	a single health score for every account
QBR / reports	data collection, presenting value	auto-generated report with metrics
Renewal	forecast, negotiations, re-signing	risk score + value case for the client
Upsell / cross-sell	finding needs, offers	next-best-action with trigger and argument
Churn-risk handling	save plans, escalations, win-back	early signal + recommended action plan

05 Core process map

Process	Today	How AI helps	Tools	Impact	Prio
Account health scoring	manually, «by feel» of the CSM	auto-scoring from usage/tickets/NPS	Gainsight, Vitally, ChurnZero	risks visible earlier	High
QBR preparation	2-4 hrs of manual data gathering	auto-report with metrics and insights	Gainsight, ChatGPT, BI	hrs/quarter per account	High
Onboarding new clients	checklist in a spreadsheet, gets forgotten	plan + auto-reminders + progress	Planhat, Rocketlane	faster time-to-value	High
Pre-call briefing	searching across CRM/email/tickets	auto-summary of the whole history	ChatGPT, Claude, Gong	prep in 2 min	High
Notes and CRM updates	manually after the call	transcription + auto-minutes	Fireflies, tl;dv	+data completeness	Med
Renewal forecast	spreadsheet, rarely updated	AI forecast on health score	ChurnZero, Clari	more accurate forecast	Med
NPS and feedback analysis	read selectively	clustering of themes and sentiment	ChatGPT, Dovetail	systematic insights	Med

06 Detailed AI use-case map

Each use case is described in a single format: process, problem, AI solution, tools, integrations, human role, KPIs, risks, complexity and priority.

Use case 1 · Health score and early churn signals

Process: the CSM watches accounts selectively; risk is noticed only when the client has already written about cancelling

Problem: subjective assessments; 60–70% of churn is «unexpected», although the signals were in the data

AI solution: the model aggregates product usage, login dynamics, tickets, correspondence tone and NPS into a single health score; on a drop — an alert to the CSM with the cause and a recommended action plan

Tools: Gainsight, ChurnZero, Vitally, Amplitude

Integrations: product analytics, CRM, helpdesk, email, Slack

Human role: the CSM verifies the cause, chooses a plan and runs the communication with the client

KPIs: share of «predicted» churn, gross churn, time from signal to action

Risks: false alerts on small data — threshold calibration and human review

Complexity: High · **Priority:** High

Use case 2 · Automated QBR report preparation

Process: before the quarterly review the CSM manually collects metrics from product analytics, CRM and tickets into a presentation

Problem: 2–4 hours per account; reports are irregular, small clients get no QBR at all

AI solution: AI gathers usage metrics, achieved goals, ROI figures and open questions and generates a draft QBR report in the branded template

Tools: Gainsight, ChatGPT/Claude, Looker Studio, Gamma

Integrations: product analytics, CRM, BI, template store

Human role: the CSM checks the figures, adds context and runs the meeting

KPIs: QBR preparation time, account coverage by reviews, renewal rate after QBR

Risks: wrong figures in a client-facing report — mandatory review before sending

Complexity: Medium · **Priority:** High

Use case 3 · Onboarding assistant

Process: a new client goes through kick-off, setup and training following a checklist in a spreadsheet

Problem: steps get lost, the client «gets stuck» and never reaches value; the first 90 days determine retention

AI solution: the assistant guides the client through the plan: auto-reminders about the next step, answers to common questions from the knowledge base, a signal to the CSM if progress stalls for more than N days

Tools: Planhat, Rocketlane, Intercom Fin, ChatGPT

Integrations: product analytics, email, in-app messenger, CRM

Human role: the Onboarding manager runs the key sessions and steps in when the client gets stuck

KPIs: time-to-value, share of onboardings completed within 30/60/90 days

Risks: «roboticizing» the first impression — live touchpoints are preserved

Complexity: Medium · **Priority:** High

Use case 4 · Next-best-action for upsell

Process: upsell offers arise chaotically — when the CSM «remembered» or the client asked themselves

Problem: missed expansion opportunities; or the opposite — offers at the wrong moment that annoy

AI solution: AI analyzes usage (limits, new teams, feature requests from tickets) and suggests to the CSM the moment, product and argument for an expansion offer

Tools: Gainsight, Vitals, Amplitude, ChatGPT

Integrations: product analytics, CRM, billing, Slack

Human role: the CSM decides whether the offer is appropriate and makes it personally

KPIs: expansion revenue, upsell conversion rate, NRR

Risks: pressuring an unhappy client — upsell only with a healthy health score

Complexity: Medium · **Priority:** High

Use case 5 · Auto-summary of client history before a call

Process: before a call the CSM reviews CRM, email, tickets and colleagues' notes across different systems

Problem: 15–30 minutes of prep or a call «blindly»; after a CSM change the context is lost

AI solution: in 2 minutes AI compiles a summary: who the client is, status, latest tickets and sentiment, open promises, risks, topics for the conversation

Tools: ChatGPT/Claude, Gong, Fireflies, Glean

Integrations: CRM, helpdesk, email, calendar, notes store

Human role: the CSM verifies key facts and runs the conversation

KPIs: call preparation time, CSAT after calls, speed of account handover

Risks: stale or mixed-up facts — verification of critical points

Complexity: Low · **Priority:** High

07 AI agents for the department

Agent	Task	Inputs	Output	Integrations
Health Score Agent	scoring account health	usage, tickets, NPS, emails	score + alert + cause	analytics, CRM, Slack
QBR Agent	generating quarterly reports	metrics, goals, history	draft QBR report	BI, CRM, templates
Onboarding Agent	running the launch plan	plan, progress, questions	reminders + answers	email, in-app, CRM
Renewal Risk Agent	forecasting renewals	health score, contracts	risk score + action plan	CRM, billing
Expansion Agent	signals for upsell	usage, limits, tickets	next-best-action	analytics, CRM
Meeting Summary Agent	summaries and minutes	call recordings, history	summary + CRM fields	Zoom, CRM

08 AI systems & tools

Category	Tools	Use for
LLM / assistant	ChatGPT Enterprise, Claude Team, Gemini	summaries, reports, correspondence analysis
CS platforms	Gainsight, ChurnZero, Vitally, Planhat	health score, playbooks, lifecycle
Product analytics	Amplitude, Mixpanel, Pendo	usage data, adoption, signals
Meeting AI	Gong, Fireflies, tl;dv	calls, notes, client sentiment
CRM	HubSpot, Salesforce, Pipedrive	accounts, contracts, tasks
Survey / NPS AI	Delighted, Qualtrics, Dovetail	NPS/CSAT, feedback analysis
Knowledge base	Notion AI, Guru, Intercom Fin	answers, onboarding content
Governance	corporate accounts, DLP, policies	security of client data

09 Integrations

System	Role	What it gives
CRM (HubSpot / Salesforce)	data core	single source of truth on accounts and contracts
Product analytics	behavior in the product	raw material for health score and adoption
Helpdesk (Zendesk / Intercom)	support tickets	signals of problems and sentiment into the health score
Email / calendar	communications	context for summaries and follow-up
Zoom / Meet + meeting AI	calls and QBR	transcriptions, notes, tone of conversations
Billing / subscriptions	money and contracts	renewal dates, limits, expansion signals
Slack / Teams	notifications	instant alerts on risks and opportunities

10 Department knowledge base

Section	What's stored
Product and pricing	features, packages, limits, expansion terms
Client segments	tiers, ICP, success criteria for each segment
Onboarding playbook	launch plans by segment, checklists, timelines
Health score model	metrics, weights, alert thresholds, rules
QBR templates	report structure, value metrics, ROI calculations
Renewal playbook	negotiation scenarios, discount policy, escalations
Save plans	common churn causes and proven retention plans
Cases and benchmarks	success stories, target adoption metrics
Account history	QBRs, incidents, promises, loss reasons

11 KPIs & impact metrics

Area	KPI
Revenue retention	NRR (net revenue retention), GRR (gross revenue retention)
Churn	logo churn, revenue churn, share of «predicted» churn
Adoption	active users, depth of feature usage, license utilization
Time-to-value	time to first value, onboarding completion within 30/60/90 days
Expansion	expansion revenue, upsell/cross-sell rate
CSM productivity	accounts per CSM, time on admin tasks, QBR coverage
AI quality	health score accuracy, share of accepted AI drafts, false alerts

12 Risks & constraints

Risk	Control
Client data privacy	corporate accounts, DPA, access restrictions, DLP
False health alerts	threshold calibration, human review, CSM feedback
Wrong figures in client reports	mandatory QBR review before sending
Over-automation of relationships	live touchpoints are preserved, AI only prepares
Upsell «at the wrong moment»	offers only with a healthy health score
Dependence on data quality	data hygiene, required fields, integration audit
Privacy of call recordings	consent, retention policy, access restrictions

13 90-day implementation plan

Period	Actions	Result
Weeks 1-2	audit of the lifecycle, usage data, tickets, churn causes	map of AI use cases and data sources
Weeks 2-4	assemble the knowledge base: playbooks, QBR templates, health metrics	ready knowledge base
Weeks 4-6	pilots: auto-summaries, QBR generator, meeting notetaker	first measurable effects
Weeks 6-10	health score v1: integration of analytics + CRM + helpdesk, alerts	working scoring with alerts
Weeks 10-12	renewal forecast, next-best-action, policies, KPIs, roles	a managed AI retention system

14 Quick wins (first 30-60 days)

Initiative	Why it's fast
Auto-summary of client history before a call	LLM + existing CRM data, no complex integrations
Auto-minutes of calls and CRM updates	ready-made tools, instant time savings
QBR drafts via AI on a template	template + metrics from BI, manual final review
Clustering of NPS feedback and tickets	works on accumulated data
Onboarding reminders on a checklist	simple rules + email automation

15 Mid-term initiatives

Initiative	What it gives
Health score v1 on unified data	early churn signals instead of «surprises»
Onboarding assistant with progress tracking	faster time-to-value, fewer stalls
Next-best-action for expansion	systematic upsell without pressuring the client
Renewal forecast on health score	accurate revenue forecast, earlier negotiations

16 Complex but high-value initiatives

Initiative	What it gives
Predictive churn model on your own data	accuracy higher than off-the-shelf scoring
Autonomous agents with end-to-end integrations	lifecycle routine without human involvement
Unified data layer (product + CRM + tickets + billing)	a full 360 view of the client
Automatic save plans by risk type	fast reaction to every churn scenario

17 Summary roadmap

Initiative	Impact	Complexity	Prio	Timeline
Auto-summary + notetaker	-time, +data	Low	High	1-2 weeks
QBR generator	review coverage	Medium	High	2-4 weeks
NPS/ticket analysis	systematic insights	Low	Medium	2-4 weeks
Onboarding assistant	+time-to-value	Medium	High	4-6 weeks
Health score + alerts	-churn	High	High	6-10 weeks
Renewal forecast	+forecast	Medium	Medium	8-10 weeks
Expansion next-best-action	+NRR	Medium	Medium	10-12+ weeks

This is a demonstration example of a deep audit of **one** department. A full AI audit covers every department in your company. Request one at auditari.com — we'll tailor the audit to your structure.

SAMPLE DEPARTMENT AUDIT

AI in HR & People

Implementation plan for a 50–500-person company:
processes, use-cases, AI agents, KPIs, risks and roadmap.

PREPARED FOR

Company / contact person

01 Role of the HR department

The HR department supplies the company with people and their productivity: hiring and onboarding, learning and development, performance cycles, compensation, engagement and personnel administration. A large share of this work consists of repetitive operations on text and data (screening hundreds of CVs, taking interview notes, answering the same employee questions, summarizing surveys), and this is exactly where AI delivers the fastest measurable impact: a recruiter runs more openings, the HR team responds in minutes, and decisions rely on data rather than gut feeling.

02 AI transformation goals

Goal	What changes	Impact
Hiring speed	CV screening and first candidate replies – in minutes	shorter time-to-hire
Hiring funnel quality	unified scorecards and structured interview notes	higher quality of hire
HR productivity	routine (JDs, letters, certificates, FAQ) automated	more time for people
Retention	early attrition signals from surveys and 1:1s	lower turnover
Scalability	headcount growth without proportional HR growth	stable HR-to-employee ratio

Key principle: AI does not make decisions for HR. It screens, structures, drafts and highlights signals – but final decisions on hiring, promotion or dismissal are always made by a human. Every AI candidate score must be explainable and contestable.

03 Typical department structure

Role	Responsibility	AI focus
HR Director / Head of People	strategy, budget, policies, C-level reporting	people analytics, dashboards, hiring forecast
Recruiter / Talent Acquisition	openings, sourcing, interviews, offers	CV screening, outreach, scorecards
HR Generalist / People Partner	manager support, cases, 1:1s, conflicts	signal aggregation, communication drafts
L&D; Manager	training, development programs, knowledge assessment	course generation, personalized tracks
C&B; Specialist	grades, salary bands, bonuses, benefits	market benchmarking, equity analysis
HR Ops / Admin	personnel records, documents, certificates, HRIS	auto-documents, HR chatbot, workflow

04 Process map (employee lifecycle)

Stage	Processes	AI result
Opening and sourcing	role profile, JD, candidate search	ready JD and a list of relevant candidates
Screening	CV review, first replies, shortlist	ranked shortlist with rationale
Interview	scheduling, conducting, notes, evaluation	auto-notes and completed scorecards
Offer and onboarding	offer, documents, first-90-days plan	generated documents and onboarding plan
Development and training	tracks, courses, progress assessment	personalized development plans
Performance review	goals, feedback collection, calibration	feedback summaries and review drafts
Engagement and retention	surveys, eNPS, exit interviews	driver themes and attrition signals

05 Core process map

Process	Today	How AI helps	Tools	Impact	Prio
CV screening	manual, hours per opening	review and ranking against criteria	Ashby AI, ChatGPT	-80% time	High
Job posts and letters	from scratch or old templates	generated from the role profile	ChatGPT, Claude	faster launch	High
Interview notes	recruiter writes manually	transcription + scorecard	Metaview, Fireflies	+evaluation quality	High
Answers to employee FAQ	HR replies to everyone	chatbot from the knowledge base	Claude, Slack bot	-50% tickets	High
Onboarding	checklists by hand	auto-plan + newcomer assistant	HRIS + LLM	faster ramp-up	Med
Survey analysis	reading comments manually	clustering of themes and sentiment	CultureAmp, ChatGPT	+depth of insight	Med
Certificates and documents	request-wait-docu ment	auto-generation from a template	HRIS workflow	minutes instead of days	Med

06 Detailed AI use-case map

Each use case is described in a single format: process, problem, AI solution, tools, integrations, human role, KPI, risks, complexity and priority.

Use case 1 · AI CV screening and candidate ranking

Process: an opening receives 100–500 applications; the recruiter reviews every CV

Problem: hours of manual screening; strong candidates get lost; criteria vary between recruiters

AI solution: AI reviews CVs against the approved role criteria, ranks candidates and writes a rationale for each

Tools: Ashby AI, Greenhouse, ChatGPT/Claude API

Integrations: ATS, careers site, job boards, email

Human role: the recruiter reviews the entire shortlist and a sample of rejections; the final yes/no is up to the human

KPI: screening time per opening, screening → interview conversion

Risks: model bias — job-related criteria only, regular audit of rejections, no auto-reject

Complexity: Medium · **Priority:** High

Use case 2 · Job posting generation and personalized outreach

Process: the recruiter writes JDs, posts and cold candidate letters by hand

Problem: slow opening launches; template letters yield a low response rate

AI solution: AI generates a JD from the role profile and grade, adapts it to channels and writes personalized outreach based on the candidate profile

Tools: ChatGPT, Claude, hireEZ, LinkedIn Recruiter AI

Integrations: ATS, LinkedIn, email, job boards

Human role: approves the JD and the band; reviews letters before sending

KPI: time to publish an opening, outreach response rate

Risks: discriminatory wording — an inclusive-language check before publishing

Complexity: Low · **Priority:** High

Use case 3 · Interview notes and structured scorecards

Process: the interviewer runs the conversation, takes notes and then fills in the evaluation at the same time

Problem: notes are incomplete; evaluations are subjective; decisions rely on the interviewer's memory

AI solution: interview transcription, a summary of answers by competency and a scorecard draft for the interviewer to confirm

Tools: Metaview, Fireflies, tl;dv, ChatGPT

Integrations: Zoom/Meet, ATS, calendar

Human role: the interviewer edits and confirms the scorecard; the candidate decision is up to the hiring team

KPI: scorecard completeness, interview → offer conversion, evaluation consistency

Risks: candidate privacy — explicit consent to record, restricted access, retention period

Complexity: Medium · **Priority:** High

Use case 4 · Onboarding assistant and HR chatbot

Process: the newcomer and employees ask HR the same questions: leave, sick leave, policies, access

Problem: HR spends up to 30% of its time on repetitive answers; the newcomer waits and gets lost

AI solution: a Slack/Teams chatbot answers from the knowledge base (policies, FAQ, onboarding materials) with a link to the source; complex cases are escalated to a human

Tools: Claude/ChatGPT + RAG, Slack/Teams bot

Integrations: knowledge base, HRIS, Slack/Teams, ticketing system

Human role: HR maintains the knowledge base and handles escalated cases

KPI: share of questions closed by the bot; response time; newcomer ramp-up

Risks: outdated policies in the base — a knowledge-base owner and regular review

Complexity: Medium · **Priority:** High

Use case 5 · Engagement survey analysis and attrition signals

Process: surveys twice a year; hundreds of text comments read selectively

Problem: insights get lost; the risk of resignation is learned from the notice

AI solution: AI clusters comments by theme and sentiment, compares teams over time and highlights early attrition signals (eNPS drops, workload/salary themes)

Tools: CultureAmp, Peakon, ChatGPT/Claude

Integrations: survey platform, HRIS, BI dashboards

Human role: the People Partner validates signals and holds conversations; no automated actions regarding people

KPI: eNPS, voluntary turnover, share retained after a signal

Risks: "surveillance" instead of care — analysis of aggregates only, transparent rules for the team

Complexity: High · **Priority:** Medium

07 AI agents for the department

Agent	Task	Inputs	Output	Integrations
CV Screening Agent	review and ranking of applications	CVs, role criteria	shortlist + rationale	ATS, email
Sourcing Agent	search and first contact	role profile, market	list + outreach drafts	LinkedIn, ATS
Interview Notes Agent	notes and scorecards	interview recording	summary + evaluation draft	Zoom, ATS
Onboarding Agent	newcomer support	onboarding plan, FAQ	answers + reminders	HRIS, Slack
HR Helpdesk Agent	answers to questions	knowledge base, policies	answer + escalation	Slack, tickets
Attrition Signal Agent	attrition signals	surveys, eNPS, HRIS	alerts + driver themes	survey, BI

08 AI systems & tools

Category	Tools	Use for
LLM / assistant	ChatGPT Enterprise, Claude Team, Gemini	JDs, letters, summaries, analysis
ATS with AI	Greenhouse, Lever, Ashby	hiring funnel, screening, scorecards
Sourcing	LinkedIn Recruiter AI, hireEZ	candidate search and enrichment
HRIS	BambooHR, HiBob, Personio	records, documents, workflow
L&D; platforms	360Learning, Docebo, LMS + LLM	courses, tracks, knowledge assessment
Survey / engagement	CultureAmp, Peakon, Officevibe	surveys, eNPS, sentiment analysis
Meeting AI	Metaview, Fireflies, tl;dv	transcription of interviews and 1:1s
Governance	corporate accounts, DLP, policies	protection of candidate and staff data

09 Integrations

System	Role	What it gives
ATS (Greenhouse / Ashby)	hiring core	a single candidate funnel and scorecards
HRIS (BambooHR / HiBob)	people-data core	source of truth for documents and analytics
Zoom / Meet + calendar	interviews and 1:1s	source of conversations for notes
Slack / Teams	communications	channel for the HR bot and notifications
Survey platform	feedback	data for engagement analysis
LMS	learning	progress and personalized tracks
BI / dashboards	analytics	hiring and retention KPIs over time

10 Department knowledge base

Section	What's stored
Company policies	leave, sick leave, remote, expenses
JD templates	role profiles, requirements, opening scripts
Grades and bands	grade structure, salary ranges, bonuses
Onboarding materials	30/60/90 plans, access, instructions
Employee FAQ	common questions and approved answers
Competency model	competencies by role and level
Interview guides	structured questions, evaluation criteria
Hiring history	funnels, sources, rejection reasons
Legal constraints	what may not be asked and stored; data retention periods

11 KPIs & impact metrics

Area	KPI
Hiring speed	time-to-hire, time-to-fill, screening time
Hiring cost	cost per hire, cost of candidate sources
Hiring quality	quality of hire, passing the probation period
Retention	voluntary turnover, retention at 90 days / 1 year
Engagement	eNPS, survey participation rate
HR productivity	openings per recruiter, request response time, share of questions closed by the bot
AI quality	shortlist accuracy, share of accepted AI drafts, complaints about unfair screening

12 Risks & constraints

Risk	Control
Bias in candidate screening	job-related criteria only, audit of rejections, a human reviews every reject
GDPR and candidate privacy	consent to processing and recording, retention periods, right to erasure
Leak of salary and health data	role-based access, corporate accounts, DLP, ban on sensitive data in public LLMs
Incorrect HR bot answers	answers only from the knowledge base with a link to the source, escalation to a human
Depersonalization of HR	AI takes the routine, not the conversations; complex cases are always handled by a human
"Surveillance" of employees	analysis of aggregated data only, transparent rules, no hidden monitoring
Legal requirements for AI in hiring	recording the role of AI in decisions, score explainability, compliance with local law

13 90-day implementation plan

Period	Actions	Result
1-2 weeks	audit of hiring processes, HRIS/ATS, HR tickets and bottlenecks	AI use-case map
2-4 weeks	assemble the knowledge base: policies, JDs, grades, FAQ, interview guides	ready knowledge base
4-6 weeks	pilots: CV screening, interview notes, HR chatbot	first measurable impact
6-10 weeks	integrations ATS + HRIS + Slack + survey, onboarding assistant	semi-automated workflows
10-12 weeks	AI-in-hiring policies, KPIs, roles, scaling	a managed AI HR system

14 Quick wins (first 30-60 days)

Initiative	Why it's fast
Generating JDs and candidate letters	ready templates + LLM, no integrations
AI CV screening on 1-2 pilot openings	works on top of the existing ATS
Interview notes and scorecards	one integration with Zoom/Meet
HR chatbot based on the FAQ	the knowledge base already partly exists
Auto-certificates and standard documents	templates + data from HRIS

15 Mid-term initiatives

Initiative	What it gives
Onboarding assistant with 30/60/90 plans	faster ramp-up and less load on HR
AI analysis of engagement surveys	sentiment drivers by team over time
Personalized development tracks in L&D;	learning tailored to the role and gaps, not "one for all"
Feedback summaries for performance review	fuller and fairer reviews in less time

16 Complex but high-value initiatives

Initiative	What it gives
Attrition forecast based on signals	retaining key people before the notice
People analytics: a single data layer (ATS + HRIS + survey)	people decisions on data, not gut feeling
Workforce planning and hiring forecast	a hiring plan in sync with the business plan
C&B; benchmarking and equity analysis	competitive bands and fair pay

17 Summary roadmap

Initiative	Impact	Complexity	Prio	Timeline
JDs and letters via AI	faster opening launches	Low	High	1-2 weeks
AI CV screening	-80% screening time	Medium	High	2-4 weeks
Interview notes + scorecards	+evaluation quality	Medium	High	2-4 weeks
HR chatbot from the knowledge base	-50% of standard tickets	Medium	High	4-6 weeks
Onboarding assistant	faster ramp-up	Medium	Medium	6-8 weeks
Engagement analysis + signals	lower turnover	High	Medium	6-10 weeks
People analytics data layer	decisions on data	High	Medium	10-12+ weeks

This is a demonstration example of a deep audit of **one** department. A full AI audit covers every department in your company. Request one at auditari.com – we'll tailor the audit to your structure.

SAMPLE DEPARTMENT AUDIT

AI in Finance

Implementation plan for a 50–500-person company:
processes, use-cases, AI agents, KPIs, risks and roadmap.

PREPARED FOR

Company / contact person

01 Role of the Finance department

The Finance department supplies the company with cash, accuracy and control: processing source documents, supplier payments (AP), invoicing and collecting receivables (AR), month-end close, budgeting and plan-vs-actual (FP&A;), cash flow management, management and tax reporting. It is the most document-heavy department: up to 70% of working time goes to data entry, reconciliations and report preparation – this is exactly where AI delivers fast, measurable impact without changing the accounting policy.

02 AI transformation goals

Goal	What changes	Impact
Close speed	source documents, reconciliations and anomalies processed automatically	close in 3–5 days instead of 10–15
Data quality	invoices recognized and posted without manual entry	fewer errors in journal entries
Predictability	AI builds a rolling forecast for cash and P&L;	managed liquidity, fewer cash gaps
Productivity	routine (reconciliations, matching, reports) automated	the team focuses on analysis, not data entry
Control	anomalies and duplicate payments caught automatically	fewer losses and less fraud

Key principle: AI prepares calculations, draft journal entries and reports, but a finance professional approves every payment, entry and report. No number goes to the bank, the ledger or the tax authority without human review.

03 Typical department structure

Role	Responsibility	AI focus
CFO / Head of Finance	strategy, liquidity, reporting, team	AI forecast, dashboards, what-if scenarios
Chief Accountant	accounting, close, taxes, audit	auto-reconciliations, entry control, close checklist
AP/AR Accountant	invoices, payments, billing, receivables	Document AI, matching, debtor reminders
Financial analyst (FP&A;)	budget, plan-vs-actual, models, reports	report generation, variance analysis, driver models
Treasurer / cash management	payment calendar, banks, FX	cash flow forecast, balance optimization
Financial controller	policies, limits, compliance	anomalies, audit trail, access control

04 Process map (Finance department)

Stage	Processes	AI result
Source-document processing	receiving, recognizing, posting documents	auto-extraction of data from invoices and acts
Payments (AP)	approval, payment calendar, disbursement	draft payments + duplicate control
Billing (AR)	invoicing, payment control, receivables	auto-invoices and smart reminders
Month-end close	reconciliations, accruals, adjustments	checklist + auto-reconciliation of accounts
Planning / budget	budget, plan-vs-actual, scenarios	driver models and variance analysis
Cash flow	forecast, gaps, placement of balances	13-week rolling forecast
Management reporting	P&L, balance sheet, dashboards, commentary	report + variance explanations in natural language

05 Core process map

Process	Today	How AI helps	Tools	Impact	Prio
Invoice entry	manually from PDF/email	OCR + extraction + posting	Vic.ai, Ramp, DocuWare	-80% entry time	High
Payment reconciliation	manually in spreadsheets	auto-matching of bank to invoices	ERP AI, HighRadius	faster reconciliation	High
Debtor reminders	irregular	auto-emails by debt age	Upflow, ChatGPT	-DSO	High
Month-end close	checklist in one's head	AI checklist + anomaly detection	FloQast, Numeric	-3-7 days of cycle	High
Plan-vs-actual analysis	manual roll-ups	auto-variance + commentary	Datarails, Cube	fast insight	Med
Cash flow forecast	spreadsheet once a month	rolling 13-week forecast	Agicap, ChatGPT	fewer gaps	Med
Management reports	analyst compiles manually	report generation on request	Power BI Copilot	report in minutes	Med

06 Detailed AI use-case map

Each use case is described in a single format: process, problem, AI solution, tools, integrations, human role, KPI, risks, complexity and priority.

Use case 1 · Document AI for invoices and source documents

Process: invoices, acts and delivery notes arrive by email/PDF and are entered manually

Problem: 5–15 min per document, errors in amounts and details, lost documents

AI solution: OCR + LLM recognizes the document, extracts details, amounts and VAT, suggests the accounting account and creates a draft journal entry in the ERP

Tools: Vic.ai, Ramp, DocuWare, ABBYY, ChatGPT

Integrations: email, ERP/1C/BAS, document workflow (Vchasno/M.E.Doc)

Human role: the accountant reviews and confirms every entry

KPI: cost and time to process an invoice, % of documents with no manual edits

Risks: misrecognized amounts – dual control above an amount threshold

Complexity: Medium · **Priority:** High

Use case 2 · AI cash flow forecast

Process: the treasurer compiles a forecast in a spreadsheet from various sources once a month

Problem: the forecast quickly goes stale; cash gaps are spotted too late

AI solution: the model gathers balances, the payment calendar, receivables and customer payment-behavior history and builds a 13-week rolling forecast with scenarios

Tools: Agicap, HighRadius, ChatGPT + banking APIs

Integrations: banks (API/statements), ERP, AR/AP modules

Human role: the treasurer approves the forecast and decisions on gaps

KPI: forecast accuracy (actual vs forecast), number of cash gaps

Risks: the model on abnormal periods – manual scenario adjustments

Complexity: Medium · **Priority:** High

Use case 3 · Auto-reconciliation and payment matching

Process: the bank statement is reconciled with invoices and bills manually

Problem: hours on reconciliation; mismatches linger for weeks; duplicate payments

AI solution: AI matches the payment, invoice and order (2-way/3-way matching), closes matches automatically and routes exceptions to a queue with an explanation

Tools: HighRadius, Ramp, ERP modules, ChatGPT for exceptions

Integrations: bank, ERP/1C/BAS, AP/AR

Human role: the accountant handles only exceptions, not the whole statement

KPI: % of auto-reconciled transactions, reconciliation time, duplicates found

Risks: false matching – auto-close only on a 100% match of details

Complexity: Medium · **Priority:** High

Use case 4 · AI month-end close assistant

Process: the close relies on the chief accountant's experience and manual checklists

Problem: close takes 10–15 days; anomalous entries are found after the fact

AI solution: AI runs the close checklist, automatically reconciles turnovers and balances, looks for anomalies in entries (unusual amounts, counterparties, accounts) and shows readiness status

Tools: FloQast, Numeric, BlackLine, ChatGPT

Integrations: ERP/1C/BAS, spreadsheets, document workflow

Human role: the chief accountant approves adjustments and signs off the close

KPI: days to close, number of post-close adjustments

Risks: missed anomalies — AI augments, not replaces, control

Complexity: High · **Priority:** High

Use case 5 · Management reports in natural language

Process: the analyst manually compiles P&L, cash and commentary for management every month

Problem: 2–4 days per report; answering "why did costs rise?" takes more days

AI solution: AI copilot over BI/ERP: generates a report on request ("show P&L; by business unit with variance commentary"), explains variance drivers and prepares a draft board commentary

Tools: Power BI Copilot, Looker, Datarails, ChatGPT

Integrations: ERP, BI, budget model, spreadsheets

Human role: the analyst checks the numbers and finalizes the conclusions

KPI: report preparation time, number of ad-hoc queries closed in a day

Risks: hallucinated numbers — report only from BI data, not from the LLM's memory

Complexity: High · **Priority:** Medium

07 AI agents for the department

Agent	Task	Inputs	Output	Integrations
Invoice Processing Agent	recognize and post source documents	PDF/photos of documents	draft journal entry	email, ERP
Reconciliation Agent	reconcile bank with ledger	statements, invoices	closed matches + exceptions	bank, ERP
Collections Agent	reminders to debtors	aging report, history	emails + escalations	AR, email, CRM
Close Assistant Agent	close checklist and anomalies	turnovers, entries	status + list of anomalies	ERP, FloQast
Cash Forecast Agent	liquidity forecast	balances, calendar, AR/AP	13-week forecast	banks, ERP
Reporting Agent	reports on request	BI, budget, actuals	report + commentary	BI, ERP, Slack

08 AI systems & tools

Category	Tools	Use for
LLM / assistant	ChatGPT Enterprise, Claude Team, Gemini	analysis, drafts, variance explanations
Document AI / OCR	Ramp, Vic.ai, DocuWare, ABBYY	invoices, acts, source documents
ERP / accounting	1C/BAS, SAP, NetSuite, Xero, QuickBooks	entries, registers, taxes
FP&A;	Datarails, Cube, Anaplan, Pigment	budget, plan-vs-actual, models
Spend management	Ramp, Payhawk, Pleo	cards, expenses, approvals
BI / reporting	Power BI (Copilot), Looker, Tableau	dashboards, reports on request
Payments / reconciliation	HighRadius, Upflow, banking APIs	reconciliation, collections, payments
Governance	corporate accounts, DLP, RBAC, audit log	security of financial data

09 Integrations

System	Role	What it gives
ERP / 1C / BAS	accounting core	a single source of truth for entries
Banks (API / statements)	cash	data for reconciliation and cash forecast
CRM	sales	forecast of receipts from deals, invoices
BI / dashboards	analytics	P&L, cash, KPIs in real time
Document workflow (Vchasno / M.E.Doc)	source documents and signatures	legally valid documents in the flow
E-invoicing / tax authority	compliance	tax-invoice registration, reporting without manual entry
Slack / Teams	communications	payment approvals and anomaly alerts

10 Department knowledge base

Section	What's stored
Accounting policy	accounting methods, depreciation, revenue recognition
Chart of accounts and analytics	accounts, line items, cost centers, projects
Close procedure	checklist, deadlines, owners
Payment policy	limits, approval levels, payment terms
Contracts and terms	payment terms of suppliers and customers
Budget model	drivers, assumptions, budget versions
Tax rules	VAT, income tax, reporting deadlines
Templates	reports, debtor letters, audit explanations
Close history	past adjustments, common errors, anomalies

11 KPIs & impact metrics

Area	KPI
Close speed	days to month-end close, % of close tasks on time
Forecast accuracy	cash forecast accuracy, budget variance
Turnover	DSO (receivables), DPO (payables), CCC
Process cost	cost to process one invoice, cost of finance function
Accounting quality	number of errors in entries, post-close adjustments
Productivity	documents per accountant, time per ad-hoc report
AI quality	% of documents with no manual edits, % of auto-reconciled transactions

12 Risks & constraints

Risk	Control
Hallucinated numbers	reports only from ERP/BI data; ban on "numbers from memory" of the LLM
Erroneous payments	dual approval, limits, auto-payments prohibited
Access control to financial data	RBAC, corporate accounts, segregation of duties
Lack of audit trail	logging of all AI actions, document versions, audit trail
Source-document recognition errors	amount threshold for dual review, sample control
Leakage of financial information	DLP, ban on public chats for financial data, encryption
Over-automation	a finance professional approves every entry and payment

13 90-day implementation plan

Period	Actions	Result
1-2 weeks	process audit: source documents, payments, close, reporting, bottlenecks	AI use-case map
2-4 weeks	assemble the knowledge base: accounting policy, chart of accounts, procedures, templates	ready knowledge base
4-6 weeks	pilots: Document AI on invoices, auto-reconciliation of the bank, debtor reminders	first measurable impact
6-10 weeks	integrations ERP + banks + BI, close checklist, cash forecast	semi-automated workflows
10-12 weeks	policies, limits, KPIs, roles, scaling to all legal entities	a managed AI finance system

14 Quick wins (first 30-60 days)

Initiative	Why it's fast
Document AI on incoming invoices	off-the-shelf services, impact visible within a week
Auto-reminders to debtors by aging	simple rules + template letters
AI draft explanations of plan-vs-actual variances	LLM on top of existing spreadsheets
Month-end close checklist	structuring without new systems
Search for duplicate payments and counterparties	a single pass over ERP history

15 Mid-term initiatives

Initiative	What it gives
Auto-reconciliation of bank with ledger (matching)	hours instead of days on reconciliation
Rolling 13-week cash forecast	managed liquidity, fewer gaps
FP&A; platform with a driver model	budget and scenarios without manual spreadsheets
AI copilot in BI for reports on request	report in minutes, less ad-hoc load

16 Complex but high-value initiatives

Initiative	What it gives
Continuous close (close in 1–3 days)	numbers for decisions almost in real time
AI fraud and anomaly detection in payments	protecting cash before a payment goes out
End-to-end data layer (ERP + banks + CRM + BI)	a complete financial picture of the company
What-if scenario modeling for the CFO	fast decisions on pricing, costs, FX

17 Summary roadmap

Initiative	Impact	Complexity	Prio	Timeline
Document AI for source documents	–80% entry time	Medium	High	2–4 weeks
Collections reminders	–DSO	Low	High	1–2 weeks
Auto payment reconciliation	faster reconciliation	Medium	High	3–5 weeks
Close checklist + anomalies	–close days	Medium	High	4–6 weeks
Cash flow forecast	fewer gaps	Medium	Medium	4–6 weeks
AI reports in BI	report in minutes	High	Medium	6–10 weeks
Continuous close + fraud detection	control and speed	High	Medium	10–12+ weeks

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SAMPLE DEPARTMENT AUDIT

AI in Operations

Implementation plan for a 50–500-person company:
processes, use-cases, AI agents, KPIs, risks and roadmap.

PREPARED FOR

Company / contact person

01 Role of the Operations department

The Operations department makes sure the company consistently delivers what it promises to customers: capacity and resource planning, project execution and service delivery, quality control, working with contractors, standard operating procedures (SOPs) and incident response. This is the most process-heavy part of the business: hundreds of repetitive actions, checklists, status meetings and documents – and this is exactly where AI removes the routine, makes processes transparent and cuts cycle time without additional hiring.

02 AI transformation goals

Goal	What changes	Impact
Process speed	statuses, minutes and documents are prepared automatically	shorter cycle time, fewer delays
Execution transparency	AI aggregates the state of tasks and meetings into a single view	control without micromanagement
Up-to-date SOPs	procedures are generated and updated from practice	fewer errors, faster onboarding
Resource planning	workload forecast based on history and pipeline	no overtime or idle teams
Consistent quality	AI verifies execution against checklists	fewer incidents and rework

Key principle: AI does not make operational decisions on its own. It gathers data, drafts procedures, flags deviations and suggests actions – decisions about processes, people and contractors are made by the manager.

03 Typical department structure

Role	Responsibility	AI focus
COO / Head of Ops	operations strategy, budget, SLA, team	ops dashboard, anomalies, forecasts
Process manager	processes, SOPs, optimization, automation	AI SOPs, process mining, workflow
Project / delivery manager	project execution, timelines, resources	auto-statuses, minutes, timeline risks
Quality manager	standards, checklists, quality audits	AI checklist verification, defect analysis
Vendor manager	contractors, contracts, supplier SLAs	SLA monitoring, contract analysis
Ops analyst	reporting, metrics, bottlenecks	natural-language BI queries, ticket/task analysis

04 Process map (operational cycle)

Stage	Processes	AI result
Capacity planning	demand, resources, workload calendar	workload forecast and resource plan
Execution / delivery	projects, tasks, statuses, deadlines	auto-statuses and early slippage signals
Quality control	checklists, acceptance, audits	AI verification and deviation report
Vendor management	selection, contracts, SLAs, payments	SLA and contract-risk monitoring
Documentation / SOP	procedures, instructions, onboarding	up-to-date SOPs generated from practice
Incidents	logging, escalation, review	classification, routing, post-mortem
Process optimization	metric analysis, bottlenecks	time-loss map and improvement plan

05 Core process map

Process	Today	How AI helps	Tools	Impact	Prio
SOP creation and updates	written manually, go stale	generation and updates from recordings	ChatGPT, Scribe, Notion AI	-errors	High
Meeting minutes	notes taken manually or not at all	auto-minutes + action items in tasks	Fireflies, tl;dv, Fathom	+execution	High
Project status reports	PM compiles manually	auto-summary from tasks and commits	Asana AI, ClickUp Brain	time savings	High
Quality control	spot checks	AI checks 100% against checklists	ChatGPT, custom LLM	-incidents	High
Resource planning	spreadsheets, intuition	forecast from history and pipeline	Float, Runn, BI+LLM	-idle time	Med
Incident handling	manual escalation	ticket classification and routing	Zendesk AI, Jira SM	-response time	Med
Bottleneck analysis	rarely, manually	process mining on task data	Celonis, BI+LLM	+throughput	Med

06 Detailed AI use-case map

Each use case is described in a single format: process, problem, AI solution, tools, integrations, human role, KPI, risks, complexity and priority.

Use case 1 · AI SOP assistant: creating and maintaining procedures

Process: procedures and instructions are written manually after process changes

Problem: SOPs go stale, new hires learn by word of mouth, errors recur

AI solution: AI drafts an SOP from screen recordings, meetings and chats; when a process changes, it proposes updates to existing procedures

Tools: ChatGPT/Claude, Scribe, Notion AI, Guidde

Integrations: Notion/Confluence, Google Drive, Slack

Human role: the process manager reviews and approves every SOP

KPI: % of processes with an up-to-date SOP, onboarding time

Risks: AI captures 'as-is', not 'as-should-be' — mandatory review by the process owner

Complexity: Low · **Priority:** High

Use case 2 · Auto-minutes for operational meetings and action-item tracking

Process: daily/weekly status meetings; agreements are recorded manually

Problem: action items get lost, no one tracks execution between meetings

AI solution: meeting transcription, auto-minutes, extraction of action items with owners and deadlines, task creation and overdue reminders

Tools: Fireflies, tl;dv, Fathom, ChatGPT

Integrations: Zoom/Meet, Asana/Jira/ClickUp, Slack

Human role: the manager reviews the minutes and confirms action items

KPI: % of action items completed on time, time spent on minutes

Risks: recording privacy — participant consent and a retention policy

Complexity: Low · **Priority:** High

Use case 3 · Bottleneck analysis from task and ticket data

Process: tasks and tickets move through stages in the tracker; where they 'get stuck' is only visible intuitively

Problem: bottlenecks are found late, optimization is done blindly

AI solution: AI analyzes task/ticket logs (time per stage, reopens, rework), clusters delay causes and builds a time-loss map with recommendations

Tools: Celonis, ClickUp Brain, BI + ChatGPT/Claude

Integrations: Jira/Asana/ClickUp, service desk, BI

Human role: the process manager verifies the findings and approves process changes

KPI: cycle time per stage, % of tasks with rework

Risks: false correlations on dirty data — tracker data-quality control

Complexity: High · **Priority:** Medium

Use case 4 · Workload forecasting and resource planning

Process: team workload is planned in spreadsheets based on experience

Problem: either overtime or idle time; new projects are accepted without understanding capacity

AI solution: AI forecasts workload from execution history, seasonality and the sales pipeline and proposes an allocation plan for people and contractors

Tools: Float, Runn, Forecast, BI + LLM

Integrations: task tracker, CRM (pipeline), calendar, HRM

Human role: the COO/PM approves the plan and decides on hiring or contractors

KPI: team utilization, % of projects without overtime

Risks: forecast on short history – confidence intervals and manual adjustment

Complexity: High · **Priority:** Medium

Use case 5 · AI quality control against checklists

Process: result quality (a document, release, order, site) is spot-checked manually

Problem: 10–20% of volume is checked, defects reach the customer

AI solution: AI checks 100% of results against approved checklists and standards, produces a deviation report and returns items for rework before handover to the customer

Tools: ChatGPT/Claude (custom prompts), Document AI

Integrations: task tracker, document storage, service desk

Human role: the quality manager handles edge cases and updates checklists

KPI: defect rate, % of customer incidents, cost of rework

Risks: formal checklist compliance without substance – periodic human audits

Complexity: Medium · **Priority:** High

07 AI agents for the department

Agent	Task	Inputs	Output	Integrations
SOP Agent	generate and update procedures	recordings, chats, old SOPs	SOP draft	Notion, Drive
Meeting Ops Agent	minutes and action items	meeting recordings	minutes + tasks	Zoom, Asana, Slack
Status Agent	auto-statuses for projects	tasks, commits, deadlines	summary + timeline risks	Jira, ClickUp
QC Agent	checklist verification	work outputs, standards	deviation report	tracker, storage
Incident Agent	classification and routing	tickets, SLA	priority + owner	service desk, Slack
Capacity Agent	workload forecasting	history, pipeline, calendar	resource plan	tracker, CRM, BI

08 AI systems & tools

Category	Tools	Use for
LLM / assistant	ChatGPT Enterprise, Claude Team, Gemini	SOPs, analysis, summaries, checklists
Workflow automation	Make, Zapier, n8n	connecting systems without code
Project management AI	Asana AI, Monday AI, ClickUp Brain	statuses, risks, task allocation
Process mining	Celonis, UiPath Process Mining	bottlenecks from actual logs
Meeting AI	Fireflies, tl;dv, Fathom	minutes, action items, meeting search
Document AI	Notion AI, Scribe, Google Document AI	procedures, instructions, document parsing
BI / analytics	Looker Studio, Power BI + Copilot	metrics, dashboards, natural-language queries
Governance	corporate accounts, DLP, policies	data and access security

09 Integrations

System	Role	What it gives
Task tracker (Jira / Asana / ClickUp)	execution core	single source of truth about work
Service desk (Zendesk / Jira SM)	incidents and requests	data for routing and SLA control
Zoom / Meet + calendar	meetings	source of minutes and action items
Notion / Confluence / Drive	knowledge and SOPs	base for AI assistants and onboarding
CRM	sales pipeline	input for workload forecasting
BI / dashboards	analytics	process metrics and KPI control
Slack / Teams	notifications	signals about deviations and escalations

10 Department knowledge base

Section	What's stored
SOPs and procedures	step-by-step instructions for all processes
Process map	stages, owners, inputs/outputs, SLAs
Quality checklists	acceptance criteria by type of work
Document templates	reports, acts, contracts, minutes
Vendor register	terms, SLAs, cooperation history, ratings
Incident base	cases, causes, resolutions, post-mortems
Metrics and standards	target cycle times, output norms
Onboarding materials	courses and guides for new people
Decisions and lessons learned	why processes were changed, what worked

11 KPIs & impact metrics

Area	KPI
Speed	process cycle time, incident response time
Reliability	on-time delivery, % SLA compliance
Cost	cost per process/operation, cost of rework
Standardization	% of processes with an up-to-date SOP, onboarding time
Incidents	count, MTTR, % of repeat incidents
Productivity	utilization, tasks per person, % overtime
AI quality	accuracy of minutes/SOPs, share of accepted AI drafts

12 Risks & constraints

Risk	Control
Incorrect AI conclusions about processes	human-in-the-loop, verification by the process owner
SOPs 'as-is' instead of 'as-should-be'	review by the process manager before publishing
Meeting-recording privacy	consent, retention policy, access restrictions
Operational-data leakage	corporate accounts, DLP, access roles
Over-automation of critical decisions	escalations and process stops are approved by a human
Dirty tracker data	data hygiene, mandatory fields, regular audits
Team resistance to change	training, pilots with early adopters, transparent metrics

13 90-day implementation plan

Period	Actions	Result
1-2 weeks	audit of processes, tracker, meetings, SOPs and bottlenecks	AI use-case map
2-4 weeks	build the knowledge base: process map, SOPs, checklists, templates	ready knowledge base
4-6 weeks	pilots: meeting minutes, SOP assistant, auto-statuses	first measurable impact
6-10 weeks	integrations tracker + service desk + BI, QC agent, incidents	semi-automated workflows
10-12 weeks	policies, KPIs, roles, scaling to all processes	a managed AI operations system

14 Quick wins (first 30-60 days)

Initiative	Why it's fast
Auto-minutes for meetings and action items in tasks	minimal integrations, instant time savings
AI SOP drafts from existing materials	ready recordings and chats + LLM
Auto-statuses for projects from the tracker	works on existing task data
Ticket classification and routing	simple rules + LLM
Template reports and acts via AI	ready templates + LLM

15 Mid-term initiatives

Initiative	What it gives
AI quality control of 100% of results	fewer customer defects, cheaper rework
Workload forecasting and resource planning	no overtime or idle time, justified hiring
Vendor SLA monitoring + contract analysis	managed vendors, fewer contract risks
Process mining on tracker data	an objective bottleneck map

16 Complex but high-value initiatives

Initiative	What it gives
End-to-end ops platform (tracker + desk + BI + LLM)	a full real-time picture of operations
Autonomous incident-management agents	response in minutes without an on-call person
Dynamic resource re-planning	automatic response to slippage and peak load
Digital twin of key processes	simulating changes before implementation

17 Summary roadmap

Initiative	Impact	Complexity	Prio	Timeline
Meeting minutes + action items	+execution, -time	Low	High	1-2 weeks
AI SOP assistant	-errors, -onboarding	Low	High	2-4 weeks
Auto-statuses for projects	transparency, -slippage	Medium	High	2-4 weeks
AI quality control	-defects	Medium	High	4-6 weeks
Incident routing	-response time	Medium	Medium	4-6 weeks
Workload forecasting	-idle time/overtime	High	Medium	6-10 weeks
Process mining + agents	+throughput	High	Medium	10-12+ weeks

This is a demonstration example of a deep audit of **one** department. A full AI audit covers every department in your company. Request one at auditari.com — we'll tailor the audit to your structure.

SAMPLE DEPARTMENT AUDIT

AI in Product

Implementation plan for a 50–500-person company:
processes, use-cases, AI agents, KPIs, risks and roadmap.

PREPARED FOR

Company / contact person

01 Role of the Product department

The Product department decides WHAT to build and WHY: discovery and user research, feedback analysis, roadmap prioritization, requirements and specifications for development, launches and metrics analysis. Most of the team's time goes into gathering and synthesizing information – interviews, tickets, reviews, analytics data, competitors. It is precisely this "information routine" where AI delivers the biggest impact: it shortens the path from a raw signal to a well-grounded product decision from weeks to days.

02 AI transformation goals

Goal	What changes	Impact
Discovery speed	synthesis of interviews and feedback in hours, not weeks	shorter idea → decision cycle
Signal completeness	100% of feedback is analyzed, not just a sample	fewer "blind spots" in pain points
Requirements quality	PRDs and user stories are generated from research data	fewer reworks in development
Grounded prioritization	impact/effort estimates rely on data	roadmap is defended with numbers
PM productivity	routine (notes, statuses, drafts) is automated	more time for strategy and customers

Key principle: AI does not make product decisions. It gathers, clusters and suggests – what to build, for whom and in what order is decided by the product team. Every AI conclusion carries a link to the primary source (ticket, interview, metric) that a human can verify.

03 Typical department structure

Role	Responsibility	AI focus
CPO / Head of Product	strategy, roadmap, portfolio, team	AI signal digests, roadmap scenarios
Product Manager	discovery, requirements, prioritization, launch	feedback synthesis, PRD drafts, hypothesis analysis
Product Designer	UX/UI, prototypes, design system	AI prototyping, solution variants
UX Researcher	interviews, usability tests, surveys	transcription, coding, insight synthesis
Product Analyst	metrics, funnels, A/B tests	natural-language queries, anomalies, reports
Product Ops	processes, tools, rituals, data	automations, data hygiene, templates

04 Process map (product cycle)

Stage	Processes	AI result
Discovery / research	interviews, surveys, market	synthesized insights with sources
Feedback analysis	tickets, reviews, NPS, calls	pain clusters with frequency and segments
Prioritization / roadmap	scoring, quarterly planning	data-backed impact/effort estimates
Requirements / specifications	PRDs, user stories, criteria	document drafts from research data
Design / prototypes	flows, mockups, tests	fast interactive prototypes
Launch	release notes, communication, enablement	generated launch materials
Metrics analysis	adoption, retention, A/B	auto-reports and explanations of deviations

05 Core process map

Process	Today	How AI helps	Tools	Impact	Prio
Feedback analysis	selective, manual	clustering of 100% of signals	Dovetail, Productboard AI	pain completeness	High
Interview analysis	notes, memory	transcription + theme coding	Dovetail, Claude, Grain	faster synthesis	High
PRD/story drafts	from scratch, manually	generation from discovery data	Claude, ChatGPT, Notion AI	-time, +quality	High
Product analytics	queries to an analyst	natural-language questions	Amplitude AI, PostHog	time-to-insight	High
Competitive monitoring	episodic	auto-digest of competitor changes	Klue, Crayon, ChatGPT	early detection	Med
Prototyping	days per mockup	prototype in an hour from a brief	Figma AI, v0, Lovable	fast tests	Med
Release materials	PM writes manually	generation from tickets and PRD	Claude, LaunchNotes	faster launch	Med

06 Detailed AI use-case map

Each use case is described in a single format: process, problem, AI solution, tools, integrations, human role, KPI, risks, complexity and priority.

Use case 1 · Feedback analysis across all channels

Process: feedback arrives via support tickets, store reviews, NPS comments, sales and CS calls

Problem: channels are fragmented; the PM sees 5–10% of signals; loud requests beat mass pain points

AI solution: a single pipeline collects all feedback, clusters pain points by theme, counts frequency, segment and revenue impact; a weekly digest of top pain points with quotes

Tools: Dovetail, Productboard AI, Kraftful, Claude/ChatGPT

Integrations: Zendesk/Intercom, App Store/Google Play, CRM, Gong, Slack

Human role: the PM validates clusters and decides what goes into the roadmap

KPI: % of channels in the pipeline, time-to-insight, number of decisions with a link to feedback

Risks: bias toward "loud" users — weighting by segment and ARR

Complexity: Medium · **Priority:** High

Use case 2 · Auto-drafts of PRDs and user stories

Process: the PM writes PRDs, user stories and acceptance criteria from scratch for every feature

Problem: 2–5 days per document; incomplete requirements — reworks and questions from development

AI solution: AI assembles a PRD draft from discovery insights, tickets and the company template: context, problem, solution, stories, criteria, edge cases, success metrics

Tools: Claude, ChatGPT, Notion AI, ChatPRD

Integrations: Notion/Confluence, Jira/Linear, Dovetail

Human role: the PM edits, approves the scope and the final document

KPI: PRD preparation time, number of clarifications from development, % of reworks

Risks: plausible but false requirements — review by the PM and tech lead is mandatory

Complexity: Low · **Priority:** High

Use case 3 · User interview analysis

Process: a researcher runs 5–15 interviews per cycle, manually transcribing and coding themes

Problem: synthesis takes 1–2 weeks; some insights are lost; knowledge stays in people's heads

AI solution: auto-transcription, theme tagging, cross-analysis of all interviews in a cycle, insight summaries with quotes; a cumulative research repository with search

Tools: Dovetail, Grain, Looppanel, Claude

Integrations: Zoom/Meet, research repository, Notion

Human role: the researcher verifies codes and formulates conclusions

KPI: research cycle time, number of interviews per cycle, insight reuse

Risks: respondent privacy — consent, anonymization, retention policy

Complexity: Medium · **Priority:** High

Use case 4 · Competitive monitoring

Process: competitor analysis is done once a quarter or before major decisions

Problem: competitor changes (features, pricing, positioning) are noticed months late

AI solution: an agent tracks competitors' sites, changelogs, reviews and job postings, and produces a weekly digest of changes with an assessment of their significance for our roadmap

Tools: Klue, Crayon, ChatGPT/Claude with web access

Integrations: Slack, Notion, roadmap tool

Human role: the PM interprets significance and the response

KPI: speed of detecting changes, number of decisions that account for competitive data

Risks: reactive "catch-up" — competitors inform, not dictate, the roadmap

Complexity: Low · **Priority:** Medium

Use case 5 · Generating and analyzing A/B hypotheses

Process: hypotheses for experiments emerge ad-hoc; results analysis waits on an analyst

Problem: few hypotheses, a long cycle; A/B results are interpreted superficially

AI solution: AI suggests hypotheses from funnel and feedback data (where the drop-off is, why), helps with experiment design, and afterward explains the result by segment and recommends the next step

Tools: Amplitude AI, PostHog, Mixpanel, Statsig, Claude

Integrations: product analytics, feature flags, BI

Human role: the analyst validates the methodology, the PM makes the decision

KPI: number of experiments per quarter, % of significant results, uplift in activation/retention

Risks: spurious correlations and p-hacking — statistical discipline, analyst review

Complexity: High · **Priority:** Medium

07 AI agents for the department

Agent	Task	Inputs	Output	Integrations
Feedback Intelligence Agent	feedback clustering	tickets, reviews, NPS, calls	top pain points + quotes	Zendesk, CRM, Slack
Research Synthesis Agent	synthesis of interviews and research	recordings, transcripts	insights + repository	Zoom, Dovetail
PRD Draft Agent	PRD/story drafts	insights, template, tickets	requirements document	Notion, Jira/Linear
Competitor Watch Agent	competitor monitoring	sites, changelogs, reviews	weekly digest	Slack, Notion
Analytics Copilot	answers to data questions	events, funnels, cohorts	report + explanation	Amplitude, BI
Launch Agent	launch materials	PRD, release tickets	release notes, FAQ	Jira, LaunchNotes, Slack

08 AI systems & tools

Category	Tools	Use for
LLM / assistant	Claude Team, ChatGPT Enterprise, Gemini	synthesis, drafts, analysis
Product analytics	Amplitude AI, Mixpanel Spark, PostHog AI	metrics, funnels, NL queries
Feedback intelligence	Dovetail, Productboard AI, Kraftful, Enterpret	feedback clustering
Research AI	Grain, Looppanel, Maze AI, Sprig	interviews, tests, surveys
Prototyping	Figma AI, v0, Lovable, Uizard	fast mockups and prototypes
Roadmap tools	Productboard, Aha!, airfocus AI	prioritization, planning
Meeting AI	Fireflies, tl;dv, Granola	meeting notes, decisions
Governance	corporate accounts, DLP, policies	user data security

09 Integrations

System	Role	What it gives
Product analytics (Amplitude / PostHog)	behavioral data	the basis for hypotheses and impact assessment
Support (Zendesk / Intercom)	user tickets	the largest channel of pain points
CRM + Gong	sales/CS calls	market requests and reasons for churn
Jira / Linear	development	linking requirements to delivery
Notion / Confluence	documents	PRDs, insights, research repository
Figma	design	prototypes and mockups in one cycle
Slack / Teams	communication	digests of signals and launches

10 Department knowledge base

Section	What's stored
Product strategy	vision, goals, north star metric
Personas and segments	profiles, JTBD, pain points, scenarios
Research repository	interviews, insights, surveys with tags
Feedback archive	pain clusters, frequencies, quotes
PRDs and decisions	requirements, ADRs, why we built/rejected
Metrics	event dictionary, dashboards, benchmarks
Competitors	profiles, comparisons, change digests
Templates	PRD, user story, hypothesis, release notes
Experiment history	hypotheses, results, conclusions

11 KPIs & impact metrics

Area	KPI
Insight speed	time-to-insight, response time to a data question
Discovery cycle	idea→validated decision cycle time, number of interviews
Product metrics	activation, retention, feature adoption, NPS
Feature adoption	% of users on a new feature within 30 days, depth of use
Prioritization	% of roadmap decisions with data grounding, % of features that hit their goal
PM productivity	time per PRD, share of time on discovery vs admin routine
AI quality	cluster accuracy, share of accepted AI drafts

12 Risks & constraints

Risk	Control
False AI insights	every conclusion links to a source, validation by PM/researcher
User data privacy	consent, anonymization, corporate accounts, DLP
Bias toward loud feedback	weighting by segment, ARR and frequency
AI-PRD without context understanding	the PM owns the scope; AI is only a draft
P-hacking in experiments	statistical methodology, analyst review
Leak of product plans via AI services	enterprise accounts, ban on public tools
Over-automation of discovery	live interviews are not replaced; AI only scales synthesis

13 90-day implementation plan

Period	Actions	Result
1–2 weeks	audit of discovery processes, feedback channels, analytics and documents	AI use-case map
2–4 weeks	assemble the knowledge base: strategy, personas, PRD templates, metrics dictionary	a ready knowledge base
4–6 weeks	pilots: feedback intelligence, PRD drafts, interview analysis	first measurable impact
6–10 weeks	integrations of support + analytics + Jira, analytics copilot, competitor watch	semi-automated workflows
10–12 weeks	policies, KPIs, roles, scaling to all product teams	a managed AI discovery system

14 Quick wins (first 30–60 days)

Initiative	Why it's fast
Clustering of support feedback	the data is already in Zendesk/Intercom
AI drafts of PRDs and user stories	a ready template + LLM, no integrations
Interview transcription and synthesis	minimal setup, instant time savings
Release notes and launch materials	generated from existing tickets and PRDs
Notes from product meetings	meeting AI connects in a day

15 Mid-term initiatives

Initiative	What it gives
A single feedback pipeline from all channels	a full picture of pain points with frequency and segments
Analytics copilot (natural-language questions)	time-to-insight in minutes instead of days
Research repository with AI search	insights accumulate and are reused
Competitive monitoring on autopilot	early detection of threats and opportunities

16 Complex but high-value initiatives

Initiative	What it gives
Data-backed roadmap prioritization	feature scoring on feedback, metrics and revenue
AI generation and pipeline of A/B hypotheses	more experiments, faster metric uplift
A single data layer (feedback + analytics + CRM + delivery)	the full signal → decision → impact loop
Prototype-to-test in a day (Figma AI / v0)	validating ideas before writing code

17 Summary roadmap

Initiative	Impact	Complexity	Prio	Timeline
Feedback intelligence	pain completeness	Medium	High	2–4 weeks
PRD draft agent	–time, +requirements quality	Low	High	1–2 weeks
Research synthesis	faster discovery	Medium	High	2–4 weeks
Analytics copilot	time-to-insight	Medium	High	4–6 weeks
Competitor watch	early detection	Low	Medium	3–5 weeks
A/B hypothesis pipeline	+product metrics	High	Medium	6–10 weeks
Data-backed roadmap	grounded decisions	High	Medium	10–12+ weeks

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SAMPLE DEPARTMENT AUDIT

AI in IT & Engineering

Implementation plan for a 50–500-person company:
processes, use-cases, AI agents, KPIs, risks and roadmap.

PREPARED FOR

Company / contact person

01 Role of the IT department

The IT department builds and maintains the product and internal infrastructure: sprint planning, development, code review, testing, deployment, monitoring, incident response and employee support. A large share of the work is repetitive tasks with clear artifacts (code, tests, logs, tickets, documentation), which is exactly where AI delivers one of the largest measurable effects: faster feature delivery, fewer bugs in production and faster recovery after failures.

02 AI transformation goals

Goal	What changes	Impact
Delivery speed	AI assistant writes boilerplate, tests and migrations	shorter feature lead time
Code quality	every PR passes AI review before a human one	fewer bugs in production
Stability	AI analyzes logs and metrics, suggests the failure cause	lower MTTR
Productivity	routine (tests, docs, tickets) automated	more time for architecture
Support scalability	helpdesk bot closes typical requests	IT grows slower than the company

Key principle: AI does not merge code or deploy to production on its own. It suggests, checks and accelerates — code review and deployment of critical changes are always confirmed by an engineer (human-in-the-loop).

03 Typical department structure

Role	Responsibility	AI focus
CTO / Head of Engineering	strategy, architecture, budget, team	DORA metrics, AI policies, tooling ROI
Team Lead	planning, code review, mentoring	AI review as the first filter, task breakdown
Developers	features, bug fixes, unit tests	coding assistant, test and docs generation
QA engineer	test plans, automated tests, regression	test autogeneration, flaky-test analysis
DevOps / SRE	CI/CD, infrastructure, monitoring	AI log analysis, IaC assistant, anomalies
Internal IT support	access, hardware, accounts	helpdesk bot, ticket auto-triage

04 Process map (development lifecycle)

Stage	Processes	AI result
Sprint planning	backlog, estimation, decomposition	draft user stories and estimates from history
Development	code, refactoring, migrations	generated code and boilerplate under control
Code review	PR review, comments	AI review before a human: bugs, style, security
Testing	unit / integration / e2e, regression	autogeneration of tests and test data
Deploy and monitoring	CI/CD, releases, metrics	anomaly analysis, release notes
Incidents	triage, diagnosis, post-mortem	cause hypotheses from logs, post-mortem draft
Internal IT support	tickets, access, onboarding	bot closes typical requests, escalates complex ones

05 Core process map

Process	Today	How AI helps	Tools	Impact	Prio
Writing code	all manual	assistant writes code, tests, migrations	Copilot, Claude Code, Cursor	+speed	High
Code review	waits on leads, queue	AI review in minutes before a human one	CodeRabbit, Graphite	-PR cycle time	High
Writing tests	often skipped	autogeneration of unit/e2e tests	Copilot, Codium, Playwright	+coverage	High
Incident analysis	manual search in logs	AI suggests the cause and a fix	Datadog, Sentry AI	-MTTR	High
Documentation	goes stale	auto docs from code and PRs	Claude Code, Mintlify	up-to-date docs	Med
IT tickets	engineers get distracted	bot closes 40-60% of typical ones	Slack bot + LLM	-workload	Med
Task estimation	subjective	estimation from history of similar tasks	LLM + Jira/Linear	more accurate plan	Med

06 Detailed AI use-case map

Each use case is described in a single format: process, problem, AI solution, tools, integrations, human role, KPI, risks, complexity and priority.

Use case 1 · AI coding assistant in daily development

Process: the developer writes code, tests, migrations and refactors manually

Problem: up to 40% of time goes to boilerplate, common patterns and searching the codebase

AI solution: an assistant in the IDE generates code from the repository context, explains someone else's code, writes tests and migrations; agentic mode completes a task end-to-end under supervision

Tools: GitHub Copilot, Claude Code, Cursor

Integrations: IDE, Git, CI

Human role: sets the task, reads and accepts every change; authorship and responsibility stay with the engineer

KPI: task lead time, share of AI-accepted code, velocity

Risks: blind acceptance of generated code — mandatory review and tests in CI

Complexity: Low · **Priority:** High

Use case 2 · AI code review

Process: every PR waits for review by a team lead or a colleague

Problem: the review queue is the main bottleneck; minor comments consume seniors' time

AI solution: an AI reviewer comments on the PR in minutes: bugs, vulnerabilities, style, forgotten edge cases; the human then looks at an already 'cleaned-up' PR and focuses on architecture

Tools: CodeRabbit, Graphite, GitHub Copilot code review

Integrations: GitHub/GitLab, CI, Slack

Human role: final approve and merge — only the engineer; AI does not block and does not merge

KPI: PR cycle time, number of comments found before human review

Risks: false positives and noise — rule tuning, confidence threshold

Complexity: Low · **Priority:** High

Use case 3 · Test autogeneration and QA automation

Process: QA writes test plans and automated tests manually; part of the code has no coverage

Problem: tests are written last; regression is long, flaky tests are ignored

AI solution: generation of unit tests from code, e2e scenarios from user stories, test data; analysis of flaky tests and fix suggestions

Tools: Copilot, Qodo (Codium), Playwright + LLM, mabl

Integrations: CI/CD, test runners, Jira/Linear

Human role: QA approves scenarios and owns the testing strategy

KPI: test coverage, escaped bugs, regression duration

Risks: tests that are 'fitted' to the code — QA-engineer review of scenarios

Complexity: Medium · **Priority:** High

Use case 4 · AI incident analysis and on-call assistant

Process: on a failure the on-call engineer manually reviews logs, metrics and recent releases

Problem: diagnosis takes hours; knowledge of past incidents lives in people's heads

AI solution: AI correlates alerts, logs and recent deploys, suggests a likely cause and steps from the runbook; after the incident it generates a post-mortem draft

Tools: Datadog Bits AI, Sentry AI (Seer), PagerDuty AI, Claude Code

Integrations: observability stack, CI/CD, Slack, PagerDuty

Human role: confirms the diagnosis, applies the fix, approves the post-mortem

KPI: MTTR, number of repeat incidents

Risks: a wrong diagnosis speeds up wrong actions — runbook and checklist are mandatory

Complexity: Medium · **Priority:** High

Use case 5 · Internal IT helpdesk bot

Process: employees write in Slack/email: access, VPN, passwords, hardware

Problem: typical requests distract engineers; response time is inconsistent

AI solution: a bot in Slack answers from the knowledge base, performs typical actions itself (password reset, policy-based access) and creates a triaged ticket for complex ones

Tools: Slack bot + Claude/GPT, Jira Service Management AI, Okta workflows

Integrations: Slack/Teams, ITSM, IdP (Okta/Google), MDM

Human role: approves sensitive access; the bot acts only within approved policies

KPI: share of tickets closed by the bot, first response time

Risks: granting excessive access — strict policies, an audit log of every action

Complexity: Medium · **Priority:** Medium

07 AI agents for the department

Agent	Task	Inputs	Output	Integrations
Coding Agent	implementing tasks under supervision	ticket, codebase	PR with code and tests	IDE, Git, CI
Code Review Agent	first review of every PR	diff, standards, history	comments + severity	GitHub/GitLab
Test Generation Agent	tests for new code	code, user stories	unit/e2e tests	CI, test runner
Incident Agent	triage and diagnosis of failures	alerts, logs, deploys	cause hypothesis + steps	Datadog, PagerDuty
Docs Agent	keeping documentation current	code, PRs, ADRs	updated docs and changelog	Git, wiki
Helpdesk Agent	internal IT support	request, knowledge base	answer / action / ticket	Slack, ITSM, IdP

08 AI systems & tools

Category	Tools	Use for
Coding assistants	GitHub Copilot, Claude Code, Cursor	code, tests, refactoring, agentic tasks
LLM / assistants	Claude Team, ChatGPT Enterprise, Gemini	analysis, texts, architecture drafts
Code review AI	CodeRabbit, Graphite, Copilot review	automatic first PR review
QA automation	Qodo (Codium), Playwright, mabl	generating and maintaining tests
Observability AI	Datadog Bits AI, Sentry AI, New Relic AI	anomalies, log analysis, RCA
DevOps / IaC	Copilot for Terraform, k8s assistants	infrastructure code, configs
Documentation AI	Mintlify, Notion AI, Claude Code	docs from code, changelog, ADR
Governance	corporate accounts, SAST, DLP, secret scanning	code and data security

09 Integrations

System	Role	What it gives
Git (GitHub / GitLab)	development core	code context for all AI tools
CI/CD (Actions / GitLab CI)	delivery pipeline	AI checks and tests on every PR
Jira / Linear	tasks and backlog	ticket → code → release linkage
Monitoring (Datadog / Sentry)	telemetry	data for AI incident diagnosis
Slack / Teams	communications	alerts, AI bots, helpdesk
ITSM (Jira SM / Freshservice)	internal tickets	auto-triage and closure of typical requests
Cloud (AWS / GCP / Azure)	infrastructure	IaC assistants, cost analysis

10 Department knowledge base

Section	What's stored
System architecture	diagrams, services, data flows
Coding standards	style, patterns, PR rules
Runbooks	actions for typical failures, on-call instructions
ADR	architecture decisions and their reasons
API documentation	contracts, examples, versions
Post-mortems	incident reviews, lessons learned
Onboarding	environment setup, first tasks
Security policies	access, secrets, working with data
Internal-support FAQ	typical requests and solutions

11 KPIs & impact metrics

Area	KPI
Speed	lead time for changes (from commit to production)
Release frequency	deployment frequency
Recovery	MTTR, change failure rate
Code review	PR cycle time, time to first review
Quality	escaped bugs, test coverage, number of hotfixes
Productivity	tasks per engineer, share of time on routine
AI quality	share of accepted AI-suggestions, AI-review accuracy

12 Risks & constraints

Risk	Control
Vulnerabilities in AI code	SAST/DAST in CI, mandatory human review, security checklist
License risks of generated code	public-code matching filters, license policy, dependency audit
Secrets and code in prompts	secret scanning, corporate accounts with no training on data, DLP
Blind trust in AI review	AI is the first filter, final approve only by a human
Skill degradation for juniors	mentoring, review without AI for learning tasks
Vendor lock-in	standard formats, 2 vendors for critical categories
Attacks via AI agents (prompt injection)	limited agent permissions, audit log, isolated environments

13 90-day implementation plan

Period	Actions	Result
1-2 weeks	audit of SDLC, DORA metrics, tools and bottlenecks	AI use-case map
2-4 weeks	knowledge base: standards, runbooks, ADR, onboarding; AI-code policy	ready knowledge base + policies
4-6 weeks	pilots: coding assistant on 1-2 teams, AI code review	first measurable effects
6-10 weeks	test autogeneration, AI incident analysis, helpdesk bot	semi-automated workflows
10-12 weeks	metrics, security gates, scaling to all teams	a managed AI development system

14 Quick wins (first 30-60 days)

Initiative	Why it's fast
Coding assistant for all developers	installs in a day, effect from the first week
AI code review on every PR	connects to GitHub in an hour
Autogeneration of unit tests for new code	works in the same assistant
Helpdesk bot based on the FAQ	ready knowledge base + Slack bot
AI drafts of release notes and changelog	generated from merged PRs

15 Mid-term initiatives

Initiative	What it gives
AI incident analysis + post-mortem drafts	lower MTTR, accumulation of knowledge
e2e regression automation with AI support	shorter release cycle, fewer escaped bugs
Docs Agent: up-to-date documentation from code	faster onboarding, fewer questions
AI estimation and decomposition of sprint tasks	more accurate planning, fewer carry-overs

16 Complex but high-value initiatives

Initiative	What it gives
Agentic development: ticket → PR under engineer supervision	typical tasks without manual coding
Self-healing infrastructure (auto-fix by runbook)	part of the incidents without human involvement
A single AI layer over code, tickets and telemetry	answers to any question about the system
AI analysis of tech debt and refactoring prioritization	managed technical debt

17 Summary roadmap

Initiative	Impact	Complexity	Prio	Timeline
Coding assistants	+development speed	Low	High	1–2 weeks
AI code review	–PR cycle time	Low	High	1–2 weeks
Test autogeneration	+coverage, –bugs	Medium	High	3–5 weeks
Helpdesk bot	–IT workload	Medium	Medium	4–6 weeks
AI incident analysis	–MTTR	Medium	High	4–8 weeks
Docs Agent	up-to-date docs	Medium	Medium	6–8 weeks
Agentic development	scale	High	Medium	10–12+ weeks

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SAMPLE DEPARTMENT AUDIT

AI in Analytics & BI

Implementation plan for a 50–500-person company:
processes, use-cases, AI agents, KPIs, risks and roadmap.

PREPARED FOR

Company / contact person

01 Role of the Analytics & BI department

Analytics and BI turn the company's raw data into decisions: they gather requirements from the business, build pipelines and the warehouse, prepare dashboards and regular reporting, answer ad-hoc requests, forecast demand and revenue, and monitor data quality. A large share of the work is routine: writing standard SQL queries, commentary on reports, documentation, and reconciling discrepancies in the numbers. This is exactly where AI delivers the biggest impact: the team answers the business in hours instead of days and frees up time for deep analysis.

02 AI transformation goals

Goal	What changes	Impact
Response speed	ad-hoc requests are answered in minutes via text-to-SQL	the business no longer waits for days
Self-service	managers query the data themselves in natural language	–50–70% of the queue to analysts
Data quality	anomalies and breaks in pipelines are caught automatically	trust in the numbers in reports
Depth of analysis	routine is automated – time for why-analysis and hypotheses	decisions, not just reports
Predictability	ML forecasts of demand, revenue, and churn	planning based on data

Key principle: AI speeds up the analysis, but an analyst validates the conclusions used for decisions. Generated SQL and auto-insights are reviewed – unverified numbers do not reach management.

03 Typical department structure

Role	Responsibility	AI focus
Head of Analytics / Data	data strategy, priorities, team	AI roadmap, quality control of conclusions
Data Analyst	ad-hoc analyses, reports, insights	text-to-SQL, auto-commentary, drafts
BI Developer	dashboards, data models, semantic layer	copilot in BI, auto-documentation
Data Engineer	pipelines, DWH, integrations	dbt model generation, debugging, tests
Data Scientist	ML models, forecasts, experiments	AutoML, feature engineering, code
Analytics Ops / Data Steward	data quality, catalog, access	AI anomaly monitoring, metadata

04 Process map (data lifecycle)

Stage	Processes	AI result
Requirements gathering	brief from the business, clarifying metrics	structured brief and draft spec
Data preparation / pipelines	ETL/ELT, dbt models, DWH	generated models and tests
Ad-hoc analyses	SQL queries, extracts, answers	text-to-SQL in minutes
Dashboards	layout, development, publishing	dashboard draft + auto-description
Regular reporting	weekly/monthly reports	auto-report with commentary
Forecasting	demand, revenue, churn models	forecast with confidence intervals
Data quality control	reconciliations, breaks, duplicates	auto-detection of anomalies and alerts

05 Core process map

Process	Today	How AI helps	Tools	Impact	Prio
Ad-hoc business requests	queue to an analyst, days	text-to-SQL + self-service	ThoughtSpot, Vanna AI	-response time	High
Report commentary	analyst writes it manually	auto-insights and explanations	Power BI Copilot, ChatGPT	time savings	High
Building pipelines	code written by hand, slow	generation of dbt models and tests	dbt + Copilot, ChatGPT	faster delivery	High
Data quality control	noticed after the fact	anomaly monitoring 24/7	Monte Carlo, GE	trust in data	High
Data documentation	outdated or missing	auto-description of tables and metrics	dbt docs + LLM	onboarding, self-service	Med
Forecasting	spreadsheets, expert judgment	ML forecast with validation	Prophet, AutoML	more accurate plan	Med
Data incident triage	manual root-cause search	AI lineage diagnostics	Monte Carlo, Datafold	faster fix	Med

06 Detailed AI use-case map

Each use case is described in a single format: process, problem, AI solution, tools, integrations, human role, KPIs, risks, complexity, and priority.

Use case 1 · Text-to-SQL: self-service queries in natural language

Process: the business asks questions of the data through a request to an analyst

Problem: the ad-hoc queue runs into days; analysts are busy with standard SQL

AI solution: an employee asks in natural language ("revenue by region for Q2"), AI generates SQL against the semantic layer and returns a table/chart

Tools: ThoughtSpot, Vanna AI, Snowflake Cortex, Looker

Integrations: DWH (BigQuery/Snowflake), metric dictionary, Slack

Human role: the analyst validates the semantic layer and spot-checks answers

KPIs: ad-hoc response time, % of self-service queries

Risks: plausible but incorrect SQL — validation of critical queries

Complexity: Medium · **Priority:** High

Use case 2 · Auto-commentary and insights for dashboards

Process: the analyst writes explanations for reports every week: what changed and why

Problem: an hour of routine; some dashboards live without commentary — nobody reads them

AI solution: AI analyzes metric changes, identifies drivers (segment, channel, region) and generates a text summary for each report

Tools: Power BI Copilot, Tableau Pulse, ChatGPT, Claude

Integrations: BI platform, DWH, email/Slack distribution

Human role: the analyst reviews conclusions before sending them to management

KPIs: dashboard adoption, time to prepare reports

Risks: incorrect attribution of causes — driver review by an analyst

Complexity: Low · **Priority:** High

Use case 3 · AI control of data quality and anomalies

Process: data reconciliations and checks are done manually or not at all

Problem: broken pipelines and duplicates are noticed after wrong numbers have already gone into a report

AI solution: monitoring of freshness, volume, schema, and distributions; anomalies are detected automatically, and an alert with a probable cause goes to Slack

Tools: Monte Carlo, Great Expectations, Datafold, Elementary

Integrations: DWH, dbt, orchestrator (Airflow), Slack

Human role: the data engineer confirms the incident and fixes the root cause

KPIs: data quality score, time-to-detect, number of incidents in reports

Risks: alert noise — threshold tuning and prioritization of critical tables

Complexity: Medium · **Priority:** High

Use case 4 · Accelerating pipeline development (dbt + AI)

Process: the data engineer writes SQL models, tests, and documentation by hand

Problem: standard transformations take days; documentation lags behind the code

AI solution: AI generates draft dbt models from a description, suggests tests, writes column descriptions, and helps debug pipeline errors

Tools: dbt + GitHub Copilot, ChatGPT, Claude Code

Integrations: dbt, git, DWH, CI/CD

Human role: the engineer code-reviews every generated model

KPIs: time from requirement to a finished model, test coverage

Risks: suboptimal SQL on large tables — review of query plans

Complexity: Medium · **Priority:** High

Use case 5 · Predictive models of demand, revenue, and churn

Process: the sales and procurement plan is built by experts in spreadsheets

Problem: forecasts are subjective; seasonality and trends are factored in "by eye"

AI solution: ML models forecast demand, revenue, and customer churn with confidence intervals; backtesting shows real accuracy

Tools: Prophet, BigQuery ML, Vertex AI, DataRobot

Integrations: DWH, CRM, ERP, BI dashboards

Human role: the data scientist validates the model, the business approves the plan

KPIs: forecast accuracy (MAPE), churn-forecast accuracy

Risks: the model breaks on a market shift — regular retraining and monitoring

Complexity: High · **Priority:** Medium

07 AI agents for the department

Agent	Task	Inputs	Output	Integrations
SQL Assistant Agent	text-to-SQL answers	question, semantic layer	SQL + table/chart	DWH, Slack
Insight Agent	report commentary	metrics, changes	text summary	BI, email
Data Quality Agent	anomaly detection	freshness, volume, schema	alert + cause	DWH, dbt, Slack
Pipeline Agent	draft dbt models	requirement, data schema	model + tests + docs	dbt, git
Forecast Agent	metric forecasts	historical data	forecast + intervals	DWH, BI
Metadata Agent	documentation and catalog	schemas, queries, lineage	table and metric descriptions	data catalog

08 AI systems & tools

Category	Tools	Use for
LLM / assistant	ChatGPT Enterprise, Claude Team, Gemini	SQL, analysis, text, debugging
BI with AI	Power BI Copilot, Tableau Pulse, Looker, ThoughtSpot	dashboards, auto-insights
Text-to-SQL	Vanna AI, Snowflake Cortex, ThoughtSpot Sage	self-service queries
Data engineering	dbt, Fivetran, Airbyte, Airflow	pipelines, transformations
Data quality	Monte Carlo, Great Expectations, Elementary	monitoring, tests, alerts
ML / forecasting	Prophet, BigQuery ML, Vertex AI, DataRobot	forecasts, scoring
Notebooks	Hex, Deepnote, Jupyter + AI	research, ad-hoc analyses
Governance	data catalog, DLP, access policies	security and control

09 Integrations

System	Role	What it gives
DWH (BigQuery / Snowflake)	data core	single source of truth for AI queries
CRM (HubSpot / Salesforce)	sales data	funnel, conversions, churn
ERP / finance system	operations data	revenue, costs, inventory
Product analytics (Amplitude / GA4)	user behavior	retention, funnels, adoption
Ad accounts	marketing data	spend and ROI by channel
Slack / Teams	insight delivery	alerts, reports, self-service queries
Data catalog	metadata	metric dictionary and lineage for AI

10 Department knowledge base

Section	What's stored
Metric dictionary	definitions, formulas, metric owners
Data schemas	tables, columns, relationships, lineage
Calculation business logic	rules: what counts as revenue, how we compute churn
SQL library	validated queries for standard questions
Dashboard catalog	what exists, for whom, where to find it
Access rules	who sees which data, PII policy
Analysis history	past studies and conclusions
Data quality rules	tests, thresholds, critical tables
FAQ	common business questions and ready answers

11 KPIs & impact metrics

Area	KPI
Speed	ad-hoc request response time, time-to-dashboard
Self-service	% of queries without an analyst, active users
Forecast accuracy	forecast accuracy (MAPE), churn-model accuracy
Data quality	data quality score, time-to-detect, incidents in reports
Adoption	active dashboard users, share of teams on data
Productivity	analyses per analyst, time on routine vs research
AI quality	% of accepted generated SQL, auto-insight accuracy

12 Risks & constraints

Risk	Control
Incorrect AI-generated SQL looks convincing	semantic layer, analyst review of critical queries
Divergence in metric definitions	a single metric dictionary with owners, calculation in one place
Incorrect auto-insights (correlation instead of causation)	human-in-the-loop before sending to management
Data leakage via external LLMs	corporate accounts, PII masking, DLP
AI access to sensitive data	row-level security, roles, query audit
ML model degradation	drift monitoring, regular retraining, backtesting
Blind trust in self-service	user training, an "AI answer, please verify" label

13 90-day implementation plan

Period	Actions	Result
1–2 weeks	audit of the data stack, DWH, dashboards, ad-hoc queue	AI use-case map
2–4 weeks	metric dictionary, semantic layer, documentation of key tables	a ready knowledge base
4–6 weeks	pilots: text-to-SQL on 2–3 domains, auto-commentary for reports	first measurable results
6–10 weeks	data quality monitoring, dbt+AI in delivery, first forecast	semi-automated workflows
10–12 weeks	access policies, KPIs, roles, scaling self-service	a managed AI analytics system

14 Quick wins (first 30–60 days)

Initiative	Why it's fast
AI assistant for writing SQL for analysts	works right away, no integrations
Auto-commentary for regular reports	ready dashboards + LLM
Auto-documentation of tables and metrics	generated from existing schemas
Basic data quality tests (dbt tests + AI)	quick coverage of critical tables
Draft analyses in AI notebooks	Hex/Deepnote with built-in AI

15 Mid-term initiatives

Initiative	What it gives
Text-to-SQL self-service for business teams	offloads analysts, fast answers
Full data quality monitoring (Monte Carlo)	trust in the numbers, fewer incidents
AI-accelerated pipeline delivery (dbt+Copilot)	faster from requirement to data
First ML forecasts (demand, revenue)	planning on data, not intuition

16 Complex but high-value initiatives

Initiative	What it gives
A semantic layer over the entire DWH	reliable text-to-SQL for the whole company
Churn and LTV models in operational processes	proactive customer retention
An autonomous analytics agent (question→analysis→report)	analytics on demand in minutes
A unified data layer (CRM + product + finance + marketing)	a complete picture of the business

17 Summary roadmap

Initiative	Impact	Complexity	Prio	Timeline
SQL assistant for analysts	-time on queries	Low	High	1-2 weeks
Auto-commentary for reports	+adoption	Low	High	2-4 weeks
Data quality monitoring	trust in data	Medium	High	4-6 weeks
Text-to-SQL self-service	-ad-hoc queue	Medium	High	4-8 weeks
dbt + AI in delivery	faster pipelines	Medium	Medium	4-6 weeks
ML forecasts	more accurate plan	High	Medium	6-10 weeks
Autonomous analytics agent	scale	High	Medium	10-12+ weeks

This is a demonstration example of a deep audit of **one** department. A full AI audit covers every department in your company. Request one at auditari.com — we'll tailor the audit to your structure.

SAMPLE DEPARTMENT AUDIT

AI in Legal & Compliance

Implementation plan for a 50–500-person company:
processes, use-cases, AI agents, KPIs, risks and roadmap.

PREPARED FOR

Company / contact person

01 Role of the Legal department

The Legal department protects the company in every deal and decision: contracts with clients and suppliers, corporate documents, intellectual property, compliance, personal data, disputes. For a 50–500-person company this is usually 2–6 lawyers who handle hundreds of documents a month. Most of their time is eaten by repetitive work – reviewing standard contracts, searching for precedent wording, answering the same business questions, tracking deadlines. This is exactly where AI delivers the greatest impact: it removes the routine so the lawyer can focus on risks and decisions.

02 AI transformation goals

Goal	What changes	Impact
Review speed	incoming contracts are analyzed by AI against the playbook in minutes	the approval cycle shrinks from days to hours
Business self-service	the business generates standard NDAs and contracts itself from templates	lawyers no longer block deals
Deadline control	deadlines, auto-renewals and obligations are tracked automatically	zero missed dates
Compliance transparency	legislative changes are monitored and mapped to processes	fewer regulatory surprises
Savings on outside counsel	routine matters are handled in-house	external spend only on complex cases

Key principle: AI is the lawyer's assistant, not a replacement. No document goes out without a lawyer's review and signature. A human bears legal responsibility for every conclusion and contract.

03 Typical department structure

Role	Responsibility	AI focus
Head of Legal / GC	strategy, key deals, risks, budget	risk dashboard, analytics across the contract portfolio
Contracts lawyer	drafting, review, approval	AI review against the playbook, template-based generation
Corporate counsel	corporate documents, M&A, IP	checklists, due diligence, IP registers
Compliance officer	policies, checks, regulatory work	monitoring legislative changes, counterparty screening
DPO	personal data, GDPR	register of processing, DPIA drafts, vendor control
Legal Ops / paralegal	registers, templates, processes, e-sign	contract repository, workflow automation

04 Process map (Legal department)

Stage	Processes	AI result
Requests from the business	"can we" questions, sign-off on actions	a Q&A; bot from the policy base answers standard questions
Contract drafting	preparing contracts and NDAs	generation from approved templates using deal data
Review of incoming contracts	analyzing third-party drafts	AI markup of risks and deviations from the playbook
Approval and signing	reconciling edits, e-sign	version control, edit consolidation, signing routes
Compliance monitoring	laws, checks, policies	digest of changes + mapping to company processes
Disputes and claims	claim work, litigation	case summaries, search for analogous positions
Storage and deadline control	archive, deadlines, renewals	repository with AI search and auto-reminders

05 Core process map

Process	Today	How AI helps	Tools	Impact	Prio
Review of incoming contracts	manual, 2-5 days	risk markup against the playbook	Spellbook, Luminance	-70% time	High
Standard NDAs and contracts	lawyer assembles manually	self-service generation from templates	Juro, Ironclad, ChatGPT	no lawyer needed	High
Business questions	emails/chats to lawyers	Q&A; bot from the policy base	Claude, ChatGPT + RAG	-50% requests	High
Deadline control	spreadsheets, memory	auto-register of dates and renewals	CLM, contract repository	0 misses	High
Legislative monitoring	newsletters, manual	digest of changes + impact on the company	legal research AI	fast reaction	Med
Claim work	every letter from scratch	drafts based on precedents	Claude, ChatGPT	faster responses	Med
Counterparty due diligence	selective, manual	auto-screening of registers and sanctions	YouControl, compliance tools	full coverage	Med

06 Detailed AI use-case map

Each use case is described in a single format: process, problem, AI solution, tools, integrations, human role, KPI, risks, complexity and priority.

Use case 1 · AI review of incoming contracts against the playbook

Process: the counterparty sends its draft; the lawyer reads it, looks for risks, makes edits

Problem: review takes 2–5 days; risky wording can be missed when documents pile up

AI solution: AI compares the contract against the company playbook: highlights risky clauses, deviations from standard positions, missing protective provisions and proposes edits

Tools: Spellbook, Luminance, Harvey, Claude

Integrations: document management, email, CLM

Human role: the lawyer reviews every flag, accepts or rejects edits, signs the final version

KPI: review time per contract, % of risky clauses found

Risks: false comfort that "AI checked it" — a full lawyer review of critical sections is mandatory

Complexity: Medium · **Priority:** High

Use case 2 · Self-service generation of standard contracts and NDAs

Process: the business asks for an NDA or a standard contract; the lawyer fills in the template manually

Problem: lawyers spend hours on documents with no legal work involved; the business waits

AI solution: an employee fills in a short form — AI assembles the document from an approved template, inserting details and terms within permitted limits; non-standard requests are escalated to a lawyer

Tools: Juro, Ironclad, PandaDoc, ChatGPT

Integrations: CRM, HR system, e-sign, contract register

Human role: the lawyer approves templates and deviation limits; reviews escalations

KPI: % of self-service contracts, time from request to signature

Risks: going beyond permitted limits — rigid template fields and automatic escalation of changes

Complexity: Medium · **Priority:** High

Use case 3 · Legal Q&A; bot for employees

Process: employees ask lawyers the same questions: leave, signatures, client data, procurement

Problem: up to 50% of lawyers' time goes to repetitive consultations; answers are inconsistent

AI solution: a bot based on policies, regulations and prior clarifications answers standard questions with a source reference; complex questions are routed to a lawyer

Tools: Claude, ChatGPT Enterprise + RAG over the policy base

Integrations: Slack / Teams, knowledge base, ticketing system

Human role: the lawyer validates the answer base and handles escalations

KPI: % of questions closed by the bot, response time

Risks: an answer without situational context — a disclaimer and mandatory escalation of atypical cases

Complexity: Low · **Priority:** High

Use case 4 · Contract repository with AI search and deadline control

Process: contracts sit in mailboxes, folders and drives; deadlines are tracked in spreadsheets

Problem: auto-renewals slip through, obligations get lost, searching "what did we sign with X" takes hours

AI solution: a single register: AI extracts parties, amounts, dates, obligations and special terms from each contract, builds a deadline calendar and answers queries in natural language

Tools: Ironclad, Juro, ContractPodAi, Luminance

Integrations: e-sign, document management, calendar, Slack

Human role: the lawyer verifies extracted data on upload and decides on reminders

KPI: missed deadlines, search time across the contract portfolio

Risks: errors in extracting dates/amounts – spot verification of critical fields

Complexity: Medium · **Priority:** High

Use case 5 · Compliance monitoring of legislative changes

Process: lawyers read newsletters and news, manually assess the impact on the company

Problem: changes are noticed late; impact assessment is unsystematic

AI solution: AI monitors sources (laws, regulatory acts, clarifications), filters what is relevant to the industry, maps it to company processes and policies and produces a digest with tasks

Tools: legal research AI, Claude, specialized compliance services

Integrations: policy base, ticketing system, email digest

Human role: the compliance officer assesses the impact and approves the action plan

KPI: time from a change being published to impact assessment, number of relevant changes missed

Risks: incomplete source coverage – the source list is approved and reviewed quarterly

Complexity: High · **Priority:** Medium

07 AI agents for the department

Agent	Task	Inputs	Output	Integrations
Contract Review Agent	risk markup against the playbook	incoming contract, playbook	risks + edits	DMS, CLM, email
Contract Drafting Agent	generation of standard documents	request form, templates	contract draft	CRM, e-sign
Legal Q&A; Agent	answers to business questions	policy base, clarifications	answer + source	Slack, Teams
Deadline Agent	control of dates and renewals	contract register	reminders + tasks	repository, calendar
Regulatory Watch Agent	legislative monitoring	legal sources, company profile	digest + impact	email, tickets
Counterparty Screening Agent	counterparty checks	registers, sanctions lists	risk profile	CRM, compliance tools

08 AI systems & tools

Category	Tools	Use for
LLM / assistants	Claude Team, ChatGPT Enterprise (corporate accounts only)	drafts, analysis, summaries
CLM (contract lifecycle)	Ironclad, Juro, ContractPodAi	contract lifecycle, workflow
Contract review AI	Spellbook, Luminance, Harvey	risk markup, comparison with the playbook
E-sign	DocuSign, Vchasno, M.E.Doc	signing, approval routes
Legal research	Westlaw AI, LIGA:ZAKON, legislative databases	searching norms and case law
Document management	SharePoint, Google Workspace, iManage	storage, versions, access rights
Compliance tools	YouControl, sanctions screening, KYC services	counterparty checks
Governance	DLP, access policies, AI usage log	data security and control

09 Integrations

System	Role	What it gives
CLM / contract repository	core of contract data	a single source of truth about obligations
CRM (sales)	deals and counterparties	a contract starts from deal data with no manual entry
E-sign	signing	a fast cycle and a legally valid signature
Document management	documents	versions, access, an audit trail
Slack / Teams	communications	Q&A; bot and deadline notifications
Ticketing system	requests to lawyers	queue, SLA, workload analytics
Accounting / ERP	payments and details	reconciling contract terms with actual payments

10 Department knowledge base

Section	What's stored
Contract templates	approved templates by deal type, including NDAs
Position playbook	standard / acceptable / unacceptable wording, fallback positions
Company policies	internal policies, regulations, codes
Precedents and prior deals	how things were negotiated before, non-standard concessions
Contract register	parties, amounts, dates, obligations, statuses
Licenses and IP	trademarks, patents, licenses, domain names
Compliance requirements	industry norms, GDPR register of processing, list of regulators
Prohibited wording	what cannot be promised or signed without escalation
Business FAQ	common employee questions and approved answers

11 KPIs & impact metrics

Area	KPI
Review speed	review time for an incoming contract (from receipt to edits)
Approval cycle	time from a business request to a signed document
Self-service	% of standard contracts created by the business without a lawyer
Deadlines	number of missed deadlines and unwanted auto-renewals
External spend	budget for outside counsel, cost per hour on a case
Productivity	documents per lawyer, time on repetitive consultations
AI quality	% of accepted AI edits, accuracy of data extraction from contracts

12 Risks & constraints

Risk	Control
Confidentiality and privilege of documents	corporate AI accounts with no training on data, DLP, role-based access
Hallucinations in legal wording	AI only suggests; a lawyer verifies every wording against the primary source
Professional liability	the signature and responsibility always rest with the lawyer; an AI conclusion is not legal advice
Personal data leakage (GDPR)	DPIA for AI tools, DPA with vendors, minimizing data in prompts
Extraction errors in the register	verification of critical fields (dates, amounts) on upload
Outdated norms in the knowledge base	a procedure to update the playbook and policies, a validity date on every document
Over-reliance by junior lawyers	AI review as a second opinion, not the first; occasional blind quality checks

13 90-day implementation plan

Period	Actions	Result
1-2 weeks	audit contract flows, document types, business requests and bottlenecks	a map of AI use cases and priorities
2-4 weeks	assemble the knowledge base: templates, position playbook, policies, FAQ	a ready knowledge base for AI
4-6 weeks	pilots: AI review of incoming contracts + self-service NDAs	first measurable impact on real documents
6-10 weeks	contract repository with date extraction, Q&A; bot in Slack/Teams	semi-automated workflows and deadline control
10-12 weeks	AI usage policies, KPIs, roles, team training	a managed AI system for the Legal department

14 Quick wins (first 30-60 days)

Initiative	Why it's fast
AI review of incoming contracts against the playbook	ready tools, impact visible on the very first contract
Self-service NDA from a template	a single document type, minimal risk, high volume
Q&A; bot based on policies	the policies are already written — they just need indexing
Draft claim letters via LLM	template + precedents, the lawyer only edits
Extraction of dates and renewals from active contracts	a one-time archive upload yields a deadline calendar

15 Mid-term initiatives

Initiative	What it gives
Full CLM: approval routes + e-sign + register	a transparent contract cycle from request to archive
Compliance monitoring of legislative changes	a systematic reaction to regulatory changes instead of scrambles
Auto-screening of counterparties at deal creation	risks visible before signing, full coverage
GDPR register of processing and vendor control with AI	an up-to-date data map and fast DPIAs

16 Complex but high-value initiatives

Initiative	What it gives
Contract portfolio analytics (risks, terms, amounts)	the GC sees the company's aggregate risk on a dashboard
AI support for disputes: positions, case law, forecast	faster preparation and a realistic assessment of prospects
End-to-end workflow deal → contract → payment → renewal	legal data connected with CRM and finance
Autonomous agents with escalation to a lawyer	the routine runs fully without a human, the lawyer only on exceptions

17 Summary roadmap

Initiative	Impact	Complexity	Prio	Timeline
AI contract review	-70% review time	Medium	High	2-4 weeks
Self-service NDAs/contracts	lawyers unblocked	Medium	High	3-5 weeks
Q&A; bot for the business	-50% requests	Low	High	2-4 weeks
Contract repository + deadlines	0 misses	Medium	High	4-6 weeks
Compliance monitoring	fast reaction	High	Medium	6-10 weeks
Counterparty screening	full coverage	Medium	Medium	4-6 weeks
Portfolio analytics and agents	manageability	High	Medium	10-12+ weeks

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SAMPLE DEPARTMENT AUDIT

AI in Procurement

Implementation plan for a 50–500-person company:
processes, use-cases, AI agents, KPIs, risks and roadmap.

PREPARED FOR

Company / contact person

01 Role of the Procurement department

The Procurement department supplies the company with goods and services at the best balance of price, quality and risk: collecting requests from teams, sourcing and evaluating suppliers, tenders and RFPs, contracts and POs, delivery control and spend analysis. It is a process with a high volume of documents and comparisons (proposals, specifications, invoices, price lists), where AI removes routine and makes decisions transparent and well-founded.

02 AI transformation goals

Goal	What changes	Impact
Cycle speed	a request is processed in hours, not days	shorter request → PO cycle
Savings	AI compares prices, finds alternatives	3–8% cost reduction
Spend transparency	spend analytics by category and supplier	managed procurement budget
Risk control	monitoring the financial health of suppliers	fewer supply disruptions
Process discipline	purchases go through the procedure, not around it	less maverick spend

Key principle: supplier selection and budget approval are always a human decision. AI prepares the analysis, proposal comparisons and recommendations, but it does not sign contracts or allocate money.

03 Typical department structure

Role	Responsibility	AI focus
Head of Procurement	strategy, budget, policies, team	spend dashboards, savings reports
Category manager	category strategies, key suppliers	price market analysis, category insights
Buyer	processing requests, POs, operational purchasing	automated request processing, PO generation
Sourcing specialist	supplier sourcing, tenders, RFPs	RFP assistant, proposal comparison
Contract manager	contracts, terms, deadlines, renewals	contract analysis, deadline control
Procurement analyst	reporting, spend analysis, KPIs	automated reports, anomaly detection

04 Process map (procurement cycle)

Stage	Processes	AI result
Requests from teams	collection, clarification, categorization	auto-classification and routing of requests
Supplier sourcing	market, registries, recommendations	short-list with profiles and risks
RFP / tenders	requirements, distribution, collecting responses	generated RFP and summary of responses
Proposal comparison	prices, terms, TCO	comparison table by criteria
Contracts / POs	agreeing terms, paperwork	contract draft and auto-PO
Receiving and control	delivery, quality, invoices	invoice-PO-delivery reconciliation (3-way match)
Spend analysis	reports, savings, categories	spend dashboard and anomalies

05 Core process map

Process	Today	How AI helps	Tools	Impact	Prio
Request processing	email/Excel, slow	auto-classification and routing	Pecoro, ChatGPT	-cycle	High
Proposal comparison	manually in spreadsheets	auto-table by criteria	ChatGPT, Claude	+decision quality	High
PO generation	manually from request	auto-PO from an approved request	Pecoro, ERP	-errors, -time	High
Invoice processing	manual entry	OCR + reconciliation with PO	Document AI, ABBYY	-errors	High
Spend analysis	once a quarter	continuous dashboard, anomalies	Sievo, Power BI	+savings	Med
Supplier monitoring	occasionally	automated risk alerts	D&B, Sievo	-disruptions	Med
Contract control	manual reminders	AI reads terms, tracks dates	ChatGPT, CLM	-penalties, -auto-renewals	Med

06 Detailed AI use-case map

Each use case is described in a single format: process, problem, AI solution, tools, integrations, human role, KPI, risks, complexity and priority.

Use case 1 · AI comparison of commercial proposals

Process: after a tender or request, 3–10 proposals arrive in different formats (PDF, Excel, email)

Problem: manual consolidation takes days; comparison criteria are inconsistent; some terms get missed

AI solution: AI extracts prices, timelines, payment terms and warranties from all documents and builds a comparison table by approved criteria with a TCO calculation

Tools: ChatGPT/Claude, Document AI, Excel/Sheets

Integrations: email, document storage, e-sourcing

Human role: reviews the table, negotiates, selects the supplier

KPI: comparison time, % of proposals with a full breakdown of terms

Risks: recognition errors — spot-check against the original

Complexity: Medium · **Priority:** High

Use case 2 · Spend analysis and maverick spend detection

Process: spend is scattered across ERP, accounting, cards and expense reports

Problem: up to 20–30% of purchases go around the procedure; there is no picture by category or supplier duplication

AI solution: AI classifies transactions by category, finds off-procedure purchases, duplicate suppliers and price anomalies

Tools: Sievo, Power BI, ChatGPT for classification

Integrations: ERP, accounting, bank

Human role: the analyst validates categories; the manager decides on violations

KPI: % of classified spend, share of maverick spend

Risks: misclassification — rules + spot audit

Complexity: Medium · **Priority:** High

Use case 3 · Automated request processing and PO generation

Process: teams submit requests by email or in spreadsheets; the buyer creates the PO manually

Problem: requests get lost, duplicated, take long to approve; POs have errors in the item codes

AI solution: AI receives a free-form request, classifies it, pulls the approved supplier and price list, and creates a PO for approval

Tools: Precoro, Coupa, ChatGPT, workflow platform

Integrations: ERP, budgeting system, Slack/Teams

Human role: approves the PO; the budget owner confirms the limit

KPI: request → PO cycle, % of POs without manual edits

Risks: purchase without budget — hard limit control in the workflow

Complexity: Medium · **Priority:** High

Use case 4 · Supplier risk monitoring

Process: supplier health is checked once — during selection

Problem: a supplier's financial problems, sanctions or lawsuits are noticed only when a delivery has already fallen through

AI solution: AI continuously monitors registries, financial reporting, news and lawsuits for key suppliers and sends alerts with a risk level

Tools: Dun & Bradstreet, Sievo, YouControl, ChatGPT

Integrations: supplier registry, Slack/Teams, CLM

Human role: assesses the alert, triggers plan B (an alternative supplier)

KPI: number of supply disruptions, reaction time to a risk alert

Risks: false alarms — thresholds and prioritization

Complexity: Medium · **Priority:** Medium

Use case 5 · RFP assistant: requirements and response scoring

Process: the sourcing specialist writes the RFP from scratch, then manually reads dozens of pages of responses

Problem: requirements are incomplete, scoring is subjective, the tender drags on for weeks

AI solution: AI generates the RFP from a template and category strategy, then scores responses against a weighted criteria matrix and prepares a score-card for each participant

Tools: ChatGPT/Claude, e-sourcing (Ariba, Prozorro for the public sector)

Integrations: template storage, email, e-sourcing

Human role: approves the requirements and weights, makes the final decision by committee

KPI: tender duration, number of qualified participants

Risks: formal scoring without context — the committee reviews the score-card

Complexity: High · **Priority:** Medium

07 AI agents for the department

Agent	Task	Inputs	Output	Integrations
Intake Agent	receiving and classifying requests	requests from email/forms	category + route	email, workflow
Bid Comparison Agent	parsing and comparing proposals	PDF/Excel proposals	comparison table	email, storage
PO Agent	PO generation and control	approved request, price list	PO draft	ERP, Precoro
Invoice Match Agent	invoice-PO-delivery reconciliation	invoices, POs, receiving	reconciliation status + discrepancies	ERP, accounting
Supplier Risk Agent	supplier monitoring	registries, news, reporting	risk alerts	D&B, Slack
Spend Agent	spend and anomaly analysis	transactions, categories	dashboard + alerts	ERP, BI

08 AI systems & tools

Category	Tools	Use for
LLM / assistant	ChatGPT Enterprise, Claude Team, Gemini	document analysis, summaries, texts
Procurement suite	Coupa, Precoro, SAP Ariba	requests, POs, catalogs, workflow
Spend analytics	Sievo, Power BI, Looker Studio	spend categories, savings, anomalies
Supplier risk	Dun & Bradstreet, Sievo, YouControl	supplier finances, sanctions, lawsuits
Document AI	ABBYY, Google Document AI	invoices, proposals, specifications
E-sourcing	SAP Ariba Sourcing, Prozorro	tenders, RFPs, auctions
Workflow automation	Make, Zapier, n8n	approval routes, notifications
Governance	corporate accounts, DLP, policies	data and access security

09 Integrations

System	Role	What it gives
ERP (SAP / 1C / Odoo)	data core	item codes, POs, stock, budget
Accounting	financial layer	invoices, payments, reconciliation
Contract system (CLM)	contracts	terms, deadlines, renewals
Bank	payments	payment statuses, limits
Warehouse / inventory	stock	reorder point, receiving
Email	request and proposal channel	source of documents for AI
Slack / Teams	notifications	approvals and risk alerts in one click

10 Department knowledge base

Section	What's stored
Supplier registry	profiles, contacts, statuses, categories
Price history	price lists and actual prices by item
RFP and contract templates	approved forms and wording
Category strategies	approach to each procurement category
Scoring criteria	weighted matrices for comparing proposals
Limits and policies	who can buy what and up to what amount
Blacklist	suppliers with violations and the reasons
Supplier SLAs	timelines, quality, penalty terms
FAQ for teams	how to submit a request, timelines, statuses

11 KPIs & impact metrics

Area	KPI
Savings	cost savings, cost avoidance, % of spend
Speed	request→PO cycle, tender duration
Discipline	% of purchases through the procedure, % maverick spend
Supplier quality	OTIF (on-time in-full), % defects, number of disruptions
Payment efficiency	% of invoices that passed auto-reconciliation, DPO
Productivity	requests/POs per buyer, time spent on routine
AI quality	classification accuracy, share of accepted AI drafts

12 Risks & constraints

Risk	Control
Purchase without budget/limit	hard limit control in the workflow, budget owner approves
Document recognition errors	spot-check against the original, OCR confidence threshold
Incorrect AI supplier recommendations	a human/committee makes the decision, AI only compares
Confidentiality of prices and terms	corporate accounts, ban on public chats, DLP
Collusion and favoritism	transparent criteria, decision logs, rotation, audit
Over-automation	auto-PO only within approved limits and catalogs
Reference data quality	cleanup of item codes and supplier registry, mandatory fields

13 90-day implementation plan

Period	Actions	Result
1-2 weeks	audit of procurement processes, request channels, ERP and document flow	AI use-case map
2-4 weeks	build the knowledge base: supplier registry, price history, templates, limits	ready knowledge base
4-6 weeks	pilots: proposal comparison, automated request processing, invoice OCR	first measurable results
6-10 weeks	integrations ERP + accounting + workflow, spend dashboard, risk monitoring	semi-automated workflows
10-12 weeks	policies, KPIs, roles, scaling to all categories	a managed AI procurement system

14 Quick wins (first 30-60 days)

Initiative	Why it's fast
AI comparison of proposals by criteria	LLM + a table template, no integrations
Auto-classification of incoming requests	works on email and forms, simple rules
Invoice OCR with reconciliation against POs	ready-made Document AI services
Drafts of RFPs and supplier emails	templates + LLM
Control of contract dates and renewals	AI reads contracts, sets reminders

15 Mid-term initiatives

Initiative	What it gives
Spend dashboard with auto-classification of spend	spend transparency and visible savings
End-to-end request → PO → payment workflow	shorter cycle and process discipline
Risk monitoring of key suppliers	fewer disruptions, plan B ready in advance
RFP assistant with response scoring	faster and more objective tenders

16 Complex but high-value initiatives

Initiative	What it gives
Predictive purchasing from the sales plan and stock levels	ordering ahead of shortages, lower inventory
Autonomous agents for catalog purchasing	routine items without human involvement within limits
Dynamic price benchmarking against the market	arguments for negotiations, catching overpricing
A single data-layer (ERP + contracts + spend + risks)	a complete picture for every supplier

17 Summary roadmap

Initiative	Impact	Complexity	Prio	Timeline
Proposal comparison	+decision quality	Medium	High	1–3 weeks
Automated request processing + PO	–cycle	Medium	High	3–5 weeks
Invoice OCR + 3-way match	–errors	Medium	High	3–5 weeks
Contract control	–penalties	Low	High	1–2 weeks
Spend analytics	+savings	Medium	Medium	4–6 weeks
Supplier risk monitoring	–disruptions	Medium	Medium	4–6 weeks
Predictive purchasing	–inventory	High	Medium	10–12+ weeks

This is a demonstration example of a deep audit of **one** department. A full AI audit covers every department in your company. Request one at **auditari.com** – we'll tailor the audit to your structure.

SAMPLE DEPARTMENT AUDIT

AI in Security

Implementation plan for a 50–500-person company:
processes, use-cases, AI agents, KPIs, risks and roadmap.

PREPARED FOR

Company / contact person

01 Role of the Security department

The Security department protects the business from cyber and corporate threats: event monitoring and alert triage, phishing defense, access and vulnerability management, vendor assessment, staff training and incident response. It is a process with an enormous volume of routine analysis (thousands of alerts, logs, emails, questionnaires), where AI removes the noise and speeds up response, while the specialist focuses on real threats and decisions.

02 AI transformation goals

Goal	What changes	Impact
Detection speed	AI triages alerts in seconds, not hours	lower MTTD and MTTR
Less noise	false positives are filtered before the analyst	SOC handles real threats
Phishing defense	suspicious emails are analyzed automatically	fewer successful attacks on staff
Managed access	access anomalies and offboarding under control	smaller attack surface
Scalability	protection grows without proportional hiring	SOC coverage without night shifts

Key principle: AI accelerates triage and analysis, but decisions to block, investigate and respond are made by the specialist. Automated actions are allowed only under approved playbooks with a rollback option.

03 Typical department structure

Role	Responsibility	AI focus
CISO / Head of Security	strategy, risks, budget, board reporting	risk dashboard, reports, metrics
Security engineer	defense architecture, hardening, integrations	SOAR playbooks, automations
SOC analyst	monitoring, alert triage, escalations	AI triage, context enrichment
GRC / compliance specialist	policies, ISO 27001 / SOC 2, audits	requirement mapping, policy drafts
IT security admin	access, IAM, patches, configurations	access review, access anomalies
Security awareness lead	training, phishing simulations	personalized campaigns, content

04 Process map (defense cycle)

Stage	Processes	AI result
Monitoring and triage	SIEM alerts, event correlation	prioritized list with context
Phishing defense	email analysis, user-report review	auto-verdict and bulk recall
Access management	provisioning, review, offboarding	access anomalies and review drafts
Vulnerabilities and patches	scanning, prioritization, fixes	ranking by real risk
Vendor / third-party risk	questionnaires, vendor policies	auto-analysis of answers and red flags
Awareness training	courses, simulations, communications	personalized scenarios by role
Incidents and investigations	containment, forensics, reports	timeline from logs and post-mortem draft

05 Core process map

Process	Today	How AI helps	Tools	Impact	Prio
SIEM alert triage	manual, queue keeps growing	auto-prioritization and enrichment	Sentinel, CrowdStrike	-noise, -MTTD	High
Phishing-report review	analyst reads every email	auto-verdict + recall	Abnormal, Proofpoint	minutes instead of hours	High
Access review	quarterly spreadsheets by hand	access anomalies, decision drafts	IAM analytics, ChatGPT	faster review	High
Vulnerability prioritization	by CVSS without context	ranking by exploitability	Qualys, Tenable	the essentials get patched	High
Vendor questionnaires	reading PDFs by hand	answer extraction, red flags	Claude, ChatGPT	days instead of weeks	Med
Awareness campaigns	the same for everyone	scenarios by role and click history	KnowBe4	lower click rate	Med
Incident reports	take days to write	post-mortem draft with timeline	Claude, SOAR	faster conclusions	Med

06 Detailed AI use-case map

Each use case is described in a single format: process, problem, AI solution, tools, integrations, human role, KPI, risks, complexity and priority.

Use case 1 · AI triage of SOC alerts

Process: SIEM/EDR generates hundreds of alerts a day, the analyst works through the queue by hand

Problem: up to 90% are false positives; real incidents wait in the queue for hours

AI solution: AI enriches every alert with context (asset, user, history), clusters duplicates, scores criticality and forms a prioritized queue with explanation

Tools: Microsoft Sentinel + Copilot, CrowdStrike Charlotte, Splunk AI

Integrations: SIEM, EDR, IAM, CMDB, Slack/Teams

Human role: the analyst confirms the verdict and decides on the response

KPI: MTTD, % of false positives reaching the analyst, alerts per analyst

Risks: a missed incident due to an AI error — sample audit of "closed" alerts

Complexity: Medium · **Priority:** High

Use case 2 · Analysis of suspicious emails and phishing reports

Process: employees report suspicious emails; the analyst reviews each one by hand

Problem: review takes 15–30 min per email; similar emails remain in other inboxes

AI solution: AI analyzes headers, links, attachments and the tone of the email, issues a verdict with justification, finds similar emails across the company and prepares a bulk recall

Tools: Abnormal Security, Proofpoint, Microsoft Defender for Office

Integrations: mail server, sandbox, SOAR, Slack bot for reports

Human role: confirms the verdict for ambiguous emails and bulk actions

KPI: report review time, % of auto-closed reports, successful phishing attacks

Risks: a false "safe" verdict — quarantine until confirmation for new templates

Complexity: Medium · **Priority:** High

Use case 3 · Access review assistant

Process: quarterly access review: exports from systems, spreadsheets, approvals

Problem: the review is a formality — owners approve everything; former employees' access "lives on" for weeks

AI solution: AI compares access with role and actual usage, highlights anomalies (excessive access, dormant accounts, incomplete offboarding) and prepares decision drafts for owners

Tools: IAM analytics (Okta, Entra ID Governance), ChatGPT/Claude for reports

Integrations: IAM/SSO, HRIS (terminations, transfers), system catalogs

Human role: the system owner approves each access revocation

KPI: access review cycle time, % of excessive access revoked, offboarding closure time

Risks: a wrong revocation breaks work — dry-run and human approval

Complexity: Medium · **Priority:** High

Use case 4 · Vendor security assessment

Process: the vendor sends a questionnaire, policies and certificates; security reads it all by hand

Problem: assessing one vendor takes days; some risks get lost in an 80-page PDF

AI solution: AI extracts answers from questionnaires and policies, maps them to company requirements (ISO 27001, GDPR), highlights discrepancies and red flags and drafts a conclusion with a risk level

Tools: Claude/ChatGPT Enterprise, Vanta, OneTrust

Integrations: vendor registry, document storage, procurement ticketing

Human role: the specialist reviews the conclusion and decides on cooperation

KPI: vendor assessment time, % of vendors with an up-to-date assessment

Risks: hallucinations on incomplete documents — source citations are mandatory

Complexity: Low · **Priority:** Medium

Use case 5 · AI incident investigation assistant

Process: after an incident, the analyst gathers logs from various systems and reconstructs the picture by hand

Problem: building the timeline takes hours; the post-mortem takes weeks to write or is never written

AI solution: AI collects events from SIEM/EDR/IAM into a single timeline, proposes attack-vector hypotheses, a list of affected assets and a post-mortem draft with recommendations

Tools: Sentinel Copilot, CrowdStrike Charlotte, Claude for reports

Integrations: SIEM, EDR, IAM, ticketing, incident database

Human role: leads the investigation, verifies hypotheses, approves conclusions

KPI: MTTR, time to a ready post-mortem, recurring incidents

Risks: a wrong hypothesis points in the wrong direction — verification against raw logs

Complexity: High · **Priority:** Medium

07 AI agents for the department

Agent	Task	Inputs	Output	Integrations
Alert Triage Agent	alert prioritization	SIEM/EDR events, context	queue + justification	SIEM, EDR, Slack
Phishing Analysis Agent	email and report review	email, attachments, URL	verdict + bulk actions	email, sandbox, SOAR
Access Review Agent	access anomalies, offboarding	IAM, HRIS, roles	decision drafts	IAM, HRIS
Vendor Risk Agent	questionnaire and policy analysis	vendor documents	conclusion + red flags	vendor registry, DMS
Vulnerability Agent	vulnerability prioritization	scans, exploit data, assets	ranked patch plan	Qualys, CMDB, tickets
Incident Scribe Agent	timeline and post-mortem	incident logs, tickets	report + recommendations	SIEM, ticketing

08 AI systems & tools

Category	Tools	Use for
LLM / assistant	ChatGPT Enterprise, Claude Team, Gemini	document analysis, reports, policies
SIEM / SOAR with AI	Microsoft Sentinel, Splunk, CrowdStrike Charlotte	triage, correlation, playbooks
Email security	Abnormal Security, Proofpoint, Defender for Office	phishing, BEC, auto-recall
EDR / XDR	CrowdStrike, SentinelOne, Defender	endpoint detection and response
Vulnerability management	Qualys, Tenable, Rapid7	scanning and prioritization
IAM / access analytics	Okta, Entra ID Governance	access, anomalies, review
Awareness platforms	KnowBe4, Hoxhunt	phishing simulations, training
Governance	DLP, private LLMs, AI-usage policies	control of data and models

09 Integrations

System	Role	What it gives
SIEM (Sentinel / Splunk)	event core	a single view of logs for triage and forensics
EDR / XDR	endpoint telemetry	detection and containment on workstations
IAM / SSO / HRIS	identities	access, offboarding, access anomalies
Email gateway	mail traffic	phishing analysis and bulk recall
CMDB / asset registry	asset context	system criticality for prioritization
Ticketing (Jira / ServiceNow)	processes	tasks for patches, incidents, review
Slack / Teams	notifications	escalations, email reports, incident statuses

10 Department knowledge base

Section	What's stored
InfoSec policies	access, passwords, data, remote work
Response runbooks	step-by-step scenarios by incident type
Asset registry	systems, owners, criticality, data
Access matrix	roles, permissions, approvers
Incident history	cases, timelines, conclusions, lessons
ISO 27001 / SOC 2 / GDPR requirements	controls, mapping, evidence
Vendor registry	vendors, assessments, contractual requirements
Awareness materials	courses, simulations, cheat sheets
Employee FAQ	how to report, what to do on suspicion

11 KPIs & impact metrics

Area	KPI
Speed	MTTD, MTTR, phishing-report review time
Triage quality	% of false positives reaching the analyst, % of auto-closed alerts
Staff resilience	phishing click rate, simulation report rate
Access	access review cycle time, offboarding closure time
Vulnerabilities	% of critical patches within SLA, average vulnerability age
Productivity	alerts per analyst, time spent on routine analysis
AI quality	verdict accuracy, % of AI recommendations accepted

12 Risks & constraints

Risk	Control
AI errors in triage (a missed incident)	sample audit of closed alerts, escalation threshold
Confidentiality of logs in external LLMs	private/on-prem models, data masking, DPA
Over-reliance on AI verdicts	human-in-the-loop, rotation of manual triage
False automated blocks	dry-run, human approval, rollback mechanism
Prompt injection via external content	input isolation, limited agent permissions
Hallucinations in reports and vendor assessments	source citations, verification against raw data
AI systems' access to sensitive data	least privilege, logging of AI actions, periodic audit

13 90-day implementation plan

Period	Actions	Result
1-2 weeks	audit of SIEM, alert flow, access, phishing statistics	AI use-case map and baseline metrics
2-4 weeks	assemble the knowledge base: policies, runbooks, asset registry, access matrix	ready knowledge base
4-6 weeks	pilots: AI alert triage, auto-review of phishing reports	first measurable results
6-10 weeks	integrations SIEM + IAM + ticketing, access review, vendor analysis	semi-automated workflows
10-12 weeks	AI-usage policies, KPIs, roles, scaling	a managed AI defense system

14 Quick wins (first 30-60 days)

Initiative	Why it's fast
Auto-review of phishing reports	ready tools, instant time savings
AI triage and enrichment of alerts	works on existing SIEM data
Policy and report drafts via LLM	ready templates + LLM
Offboarding anomalies (IAM + HRIS)	simple rules, high risk closed
Vendor questionnaires via AI extraction	requires no deep integrations

15 Mid-term initiatives

Initiative	What it gives
SOAR playbooks with AI enrichment	semi-automated response to typical incidents
Full-fledged access review assistant	fast, meaningful access reviews
Risk-based vulnerability prioritization	what is actually exploited gets patched
Personalized awareness campaigns	lower click rate by risk role

16 Complex but high-value initiatives

Initiative	What it gives
Autonomous L1 triage with escalation to a human	24/7 SOC coverage without night shifts
UEBA: user behavior analytics	detection of insiders and compromises
Continuous compliance (ISO 27001 / SOC 2)	evidence and controls collected automatically
Unified security data layer (SIEM + IAM + CMDB)	full context for every decision

17 Summary roadmap

Initiative	Impact	Complexity	Prio	Timeline
Phishing-report review	minutes instead of hours	Medium	High	2–4 weeks
AI alert triage	–noise, –MTTD	Medium	High	2–4 weeks
Access review assistant	–attack surface	Medium	High	3–5 weeks
Vendor risk analysis	days instead of weeks	Low	Medium	1–2 weeks
Risk-based patching	+SLA coverage	Medium	Medium	4–6 weeks
Incident scribe + post-mortem	–MTTR	High	Medium	6–10 weeks
Autonomous L1 triage	24/7 coverage	High	Medium	10–12+ weeks

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SAMPLE DEPARTMENT AUDIT

AI in Leadership & Strategy

Implementation plan for a 50–500-person company:
processes, use-cases, AI agents, KPIs, risks and roadmap.

PREPARED FOR

Company / contact person

01 Role of Leadership & Strategy

The CEO office, the strategy function and the PMO turn company data into decisions: KPI monitoring, management meetings, strategic planning and OKRs, the project portfolio, reporting for the board and investors. This is exactly where most of leaders' time is eaten up by collecting statuses, preparing reports and rebuilding context ("what did we decide and why") – the routine layer that AI removes fastest, freeing up time for the decisions themselves.

02 AI transformation goals

Goal	What changes	Impact
Decision speed	data and options ready before the meeting, not after	shorter "signal – decision" cycle
Status transparency	project statuses and KPIs collected automatically	one picture without "hunting" for data
CEO office productivity	routine (minutes, reports, decks) automated	more time for strategy and people
Reporting quality	board and investor materials from a template	faster, more consistent communication
Execution control	action items and OKRs under automatic control	fewer "lost" decisions

Key principle: AI prepares analytics, options and drafts – strategic decisions and accountability for them stay with the leader. An AI conclusion without source verification never becomes the basis for a decision.

03 Typical structure

Role	Responsibility	AI focus
CEO	strategy, key decisions, culture	executive dashboard, brief summaries, decision support
COO / Chief of Staff	operating rhythm, decision execution	action-item control, auto-statuses, follow-up
Head of Strategy	market analysis, strategic initiatives	market intelligence, scenarios, analytics
PMO lead	project portfolio, methodology	auto-collected statuses, risks, resources
Executive assistant	calendar, communications, prep	meeting prep, minutes, email drafts
Business analyst	data, reports, ad-hoc analytics	natural-language BI, auto-reports

04 Process map (management loop)

Stage	Processes	AI result
KPI monitoring	collecting metrics, explaining deviations	dashboard with “why it dropped” explanations
Management meetings	prep, minutes, action items	auto-minutes and decision tracking
Strategic planning / OKRs	analysis, sessions, goal setting	OKR drafts, scenarios, consistency check
Project portfolio	statuses, resources, priorities	auto-statuses and early risk signals
Board / investor reporting	deck, metrics, narratives	board deck draft from data
Market intelligence	competitors, market, trends	regular digest with sources
Decision cascading	communication, tasks, control	auto-distribution of decisions and reminders

05 Core process map

Process	Today	How AI helps	Tools	Impact	Prio
Weekly report for CEO	analyst collects it manually over 1-2 days	auto-summary of metrics and statuses	Power BI Copilot, ChatGPT	~80% time	High
Meeting minutes	written manually or not at all	transcription, summary, action items	Fireflies, Granola	nothing gets lost	High
Project statuses	PMO “chases” the PMs	auto-collected from task trackers	Asana AI, Monday AI	transparent portfolio	High
Board deck	weeks of manual work	draft from data and a template	ChatGPT, Gamma, Copilot	days instead of weeks	Med
Competitive review	occasional, manual	continuous monitoring and digest	Crayon, AlphaSense	early signals	Med
Action-item control	in notes and memory	decision register + auto-reminders	Slack AI, Asana	decisions get executed	High
KPI deviation explanations	days of digging in BI	natural-language “why” answer	ThoughtSpot, Copilot	fast diagnosis	Med

06 Detailed AI use-case map

Each use case is described in a single format: process, problem, AI solution, tools, integrations, human role, KPI, risks, complexity and priority.

Use case 1 · AI executive dashboard with deviation explanations

Process: the CEO reviews company KPIs weekly: revenue, margin, pipeline, churn, cash

Problem: dashboards show the “what” but not the “why”; digging into deviations takes days of analyst time

AI solution: a natural-language layer over BI: explanations of deviations, drivers, anomalies and answers to questions like “why did margin drop in April” in plain language

Tools: Power BI Copilot, ThoughtSpot, Tableau Pulse, ChatGPT

Integrations: DWH/BI, CRM, ERP/finance

Human role: the analyst validates the metric logic; the CEO makes the decision

KPI: time from signal to decision, analyst hours on ad-hoc requests

Risks: spurious correlations passed off as “causes” — drivers verified by the analyst

Complexity: Medium · **Priority:** High

Use case 2 · Auto-collected project statuses and a weekly report for the CEO

Process: the PMO collects statuses from PMs weekly and compiles a report for the CEO

Problem: statuses are subjective and a week late; the PMO spends 1–2 days collecting them

AI solution: an agent reads task trackers, commits and timelines, generates a status for each project (progress, risks, blockers) and rolls it up into a weekly report

Tools: Asana AI, Monday AI, Jira + ChatGPT, Notion AI

Integrations: project tools, Slack/Teams, calendar

Human role: the PM confirms/adjusts the status; the PMO finalizes the report

KPI: report preparation time, % of projects with a current status

Risks: “green” statuses on incomplete data — mandatory PM confirmation

Complexity: Medium · **Priority:** High

Use case 3 · Meeting AI for management meetings

Process: standups, strategy sessions, 1-on-1s: decisions and action items are captured manually

Problem: up to 30% of decisions get lost; no one remembers the context of “why we decided that way”

AI solution: transcription, summary, extraction of decisions and action items with owners and deadlines; a decision log with automatic deadline reminders

Tools: Fireflies, Granola, tl;dv, Zoom AI Companion

Integrations: Zoom/Meet, calendar, Slack/Teams, task tracker

Human role: the chair confirms the minutes; owners work from their tasks

KPI: % of action items completed on time, time spent on minutes

Risks: confidentiality of strategic conversations — a separate environment with restricted access

Complexity: Low · **Priority:** High

Use case 4 · Market / competitor intelligence digest

Process: the strategist and CEO track the market, competitors and regulation

Problem: monitoring is occasional; important competitor moves are noticed late

AI solution: an agent monitors competitor sites and prices, news, job postings and industry reports and produces a weekly digest with “what this means for us” takeaways and links to sources

Tools: Crayon, AlphaSense, Perplexity, ChatGPT deep research

Integrations: email/Slack (delivery), knowledge base

Human role: the Head of Strategy verifies the conclusions and brings them to the meeting

KPI: time to detect a competitor move, number of decisions based on the digest

Risks: hallucinations and unverified facts — only with links to sources

Complexity: Medium · **Priority:** Medium

Use case 5 · Assistant for board deck and strategic document prep

Process: the quarterly board deck, investor updates, strategic memos

Problem: weeks of work for the CFO/CoS; numbers are collected manually, narratives written from scratch each time

AI solution: an assistant pulls current metrics from BI, uses previous decks as a structure template and generates a draft of slides and narrative; separately — drafts of strategic memos using the company framework

Tools: ChatGPT/Claude, Gamma, Microsoft 365 Copilot

Integrations: BI/DWH, document storage, previous board materials

Human role: the CEO/CFO rewrite the key messages and approve every number

KPI: deck preparation time, number of revision iterations

Risks: wrong numbers in front of the board — every number reconciled against BI before it is shown

Complexity: Medium · **Priority:** High

07 AI agents for the department

Agent	Task	Inputs	Output	Integrations
KPI Watcher Agent	monitoring metrics and anomalies	DWH, BI, plans	alert + deviation explanation	BI, Slack
Project Status Agent	auto-statuses for the portfolio	task trackers, commits	weekly report + risks	Jira/Asana, Slack
Meeting Secretary Agent	minutes and action items	meeting recording	decisions + tasks with deadlines	Zoom, tracker
Market Intel Agent	monitoring the market and competitors	web, news, reports	weekly digest	email, knowledge base
Board Prep Agent	board materials draft	BI, past decks	deck + narrative	BI, PowerPoint
Decision Tracker Agent	decision register and control	minutes, tracker	action-item status + reminders	Slack, tracker

08 AI systems & tools

Category	Tools	Use for
LLM / assistant	ChatGPT Enterprise, Claude Team, Gemini	analysis, memos, drafts, Q&A;
BI / executive dashboards	Power BI Copilot, ThoughtSpot, Tableau Pulse	KPIs with natural-language explanations
Meeting AI	Fireflies, Granola, tl;dv, Zoom AI	minutes, decisions, action items
OKR / portfolio	Quantive, Asana, Monday, Jira Align	goals, portfolio, auto-statuses
Market intelligence	AlphaSense, Crayon, Perplexity	competitors, market, trends
Document / presentation AI	Gamma, MS 365 Copilot, Notion AI	board deck, memos, reports
Workflow automation	Zapier, Make, n8n	decision distribution, reminders, data collection
Governance	corporate accounts, DLP, access policies	protecting strategic data

09 Integrations

System	Role	What it gives
BI / DWH	metrics core	a single source of truth for KPIs and reports
CRM	commercial data	pipeline, conversions, revenue forecast
ERP / finance	financial data	margin, cash, P&L; for the dashboard and board
Project tools (Jira / Asana)	project portfolio	auto-statuses and execution risks
Calendar / email	the leader's context	meeting prep and prioritization
Slack / Teams	communications	delivery of alerts, digests, reminders
HRIS	people data	headcount, hiring, eNPS in the overall picture

10 Knowledge base

Section	What's stored
Strategy and OKRs	strategic documents, goals, the metric tree
KPI dictionary	metric definitions, formulas, owners
Decision log	decisions, context, alternatives, consequences
Board materials	decks, minutes, commitments to the board
Meeting playbooks	formats, rhythm, roles, agenda templates
Project portfolio	project charters, statuses, resources
Competitive reviews	competitor profiles, digests, comparisons
Investor documents	updates, reports, cap table, agreements
FAQ	common team questions about strategy and priorities

11 KPIs & impact metrics

Area	KPI
Decision speed	time from signal to decision, number of deferred decisions
Reporting	preparation time for weekly/board reports
Portfolio	% of projects on schedule and on budget
Transparency	% of projects with a current status, dashboard data freshness
Execution	% of action items completed on time
CEO office	hours of routine per week for the CoS/EA/analyst
AI quality	accuracy of summaries, share of accepted AI drafts

12 Risks & constraints

Risk	Control
Confidentiality of strategic data	a separate environment, corporate accounts, role-based access, DLP
Decisions based on unverified AI conclusions	human-in-the-loop, mandatory sources, analyst validation
Wrong numbers in board materials	every number reconciled against BI, owner sign-off
Leak of management meeting recordings	recording policy, encryption, retention, no external bots
“Green” project statuses without basis	PM confirmation, cross-check against tracker data
Illusion of control through dashboards	regular deep reviews, not just metrics
Dependence on data quality	KPI dictionary, metric owners, data hygiene in the trackers

13 90-day implementation plan

Period	Actions	Result
1-2 weeks	audit of the management rhythm: meetings, reports, KPIs, status flows	AI use-case map
2-4 weeks	assemble the knowledge base: strategy, OKRs, KPI dictionary, templates, decision log	a ready knowledge base
4-6 weeks	pilots: meeting AI on standups, auto weekly report, competitor digest	first measurable impact
6-10 weeks	integrations of BI + trackers + calendar, executive dashboard, decision tracker	a semi-automated management loop
10-12 weeks	access policies, KPIs, roles, board prep assistant, scaling	a managed AI system for the CEO office

14 Quick wins (first 30-60 days)

Initiative	Why it's fast
Meeting AI on management meetings	one tool, impact from the first week
Auto weekly report for the CEO	runs on existing trackers and BI
Competitor and market digest	requires no internal integrations
Memo and email drafts via LLM	ready templates + a corporate account
Decision register with reminders	simple rules + meeting minutes

15 Mid-term initiatives

Initiative	What it gives
Executive dashboard with natural-language explanations	fast diagnosis of deviations without queuing for an analyst
Auto-statuses for the project portfolio with risk signals	execution transparency without manual collection
Board prep assistant on BI data	days instead of weeks for quarterly reporting
AI support for the OKR cycle	coherent goals and honest progress tracking

16 Complex but high-value initiatives

Initiative	What it gives
A unified data layer (BI + CRM + ERP + trackers)	the full company picture in one place
Scenario modeling of decisions (what-if)	evaluating options before, not after, the decision
An end-to-end decision loop: decision – tasks – control	no decision gets lost between the meeting and execution
An AI early-warning system for the portfolio and market	risks visible weeks before a crisis

17 Summary roadmap

Initiative	Impact	Complexity	Prio	Timeline
Meeting AI + decision log	decisions don't get lost	Low	High	1-2 weeks
Auto weekly report	–80% time on the report	Medium	High	2-4 weeks
Market intel digest	early market signals	Medium	Medium	2-4 weeks
Executive dashboard + explanations	fast diagnosis	Medium	High	4-8 weeks
Auto-statuses for the portfolio	execution transparency	Medium	High	4-8 weeks
Board prep assistant	days instead of weeks	Medium	Medium	6-10 weeks
Scenario modeling	better-quality decisions	High	Medium	10-12+ weeks

This is a demonstration example of a deep audit of **one** department. A full AI audit covers every department in your company. Request one at auditari.com – we'll tailor the audit to your structure.

SAMPLE DEPARTMENT AUDIT

AI in Administration

Implementation plan for a 50–500-person company:
processes, use-cases, AI agents, KPIs, risks and roadmap.

PREPARED FOR

Company / contact person

01 Role of the Administration department

Administration and office management keep the company running smoothly: incoming correspondence and document flow, executive calendars and meeting rooms, business travel, office procurement, corporate events, facilities and day-to-day employee requests. It is the department with the highest share of routine, repetitive operations (registering documents, approvals, bookings, certificates), so AI delivers a fast and easily measurable effect here without changing the business model.

02 AI transformation goals

Goal	What changes	Impact
Document-flow speed	incoming letters are classified and routed within minutes	fewer delays in approvals
Request manageability	employee requests sit in a single queue with AI triage	predictable SLAs instead of "whoever shouts loudest"
Productivity	routine (registration, minutes, expense reports) is automated	more time for service and control
Cost control	AI reconciles invoices, receipts and travel-policy limits	fewer overruns and "lost" receipts
Scalability	more people and offices without a proportional admin-headcount increase	lower support cost per employee

Key principle: AI does not sign documents, approve spending or make HR or legal decisions. It registers, drafts, reconciles and reminds — the signature, budget and final decision always rest with the responsible person.

03 Typical department structure

Role	Responsibility	AI focus
Office manager	office, budget, suppliers, team	request dashboard, SLA and cost control
Administrator / reception	guests, calls, mail, meeting rooms	AI triage of requests, room booking
Executive assistant	executive calendars, trips, briefs	scheduling assistant, prep summaries, minutes
Records clerk / document flow	registration, orders, archive, contracts	classification, OCR, deadline control
Travel coordinator	tickets, hotels, visas, expense reports	option selection, receipt reports via OCR
Facilities manager	repairs, cleaning, procurement, security	service requests, stock forecasting

04 Process map (department)

Stage	Processes	AI result
Correspondence and document flow	intake, registration, routing, archive	auto-classification and document card
Calendars and meetings	slots, meeting rooms, attendees, rescheduling	a selected slot and an agenda
Business travel	routes, tickets, hotels, expense reports	policy-compliant options + receipt report
Office procurement	requests, suppliers, invoices, stock	draft order and invoice reconciliation
Events and hospitality	corporate events, guest hosting, catering	checklist, cost estimate, mailings
Facilities / services	repairs, cleaning, access, parking	routed requests with deadlines
Certificates and employee requests	certificates, passes, stationery, questions	instant bot reply or a ticket

05 Core process map

Process	Today	How AI helps	Tools	Impact	Prio
Incoming correspondence	manual sorting, queue	classification, registration, routing	Document AI, ChatGPT	–80% sorting time	High
Meeting scheduling	"when works for you?" emails	auto-selection of slots and rooms	Reclaim, Clockwise	faster approvals	High
Expense reports	receipts by hand in Excel	receipt recognition, auto-report	Expensify, Navan	–errors, –time	High
Employee requests	email/messengers, chaotic	helpdesk bot with FAQ and tickets	GPT bot, Jira SM	reply in seconds	High
Meeting minutes	rarely written	auto-minutes + action items	Fireflies, tl;dv	execution control	Med
Stationery procurement	"when we run out"	stock forecasting, draft order	ChatGPT, sheets+Make	no shortages	Med
Contract deadline control	reminders kept in people's heads	register + auto-alerts	EDM, Make/Zapier	no overdue items	Med

06 Detailed AI use-case map

Each use case follows a single format: process, problem, AI solution, tools, integrations, human role, KPI, risks, complexity and priority.

Use case 1 · AI processing of incoming correspondence

Process: paper and electronic letters, invoices and contracts arrive at the office and are sorted by hand

Problem: sorting and registration take hours; documents get lost, response deadlines are missed

AI solution: OCR + LLM classify the document (invoice / contract / request / official letter), extract details, register it in the log and route it to the responsible person with a deadline

Tools: Google Document AI, ABBYY, ChatGPT, Vchasno

Integrations: email, scanner, EDM, document register, Slack/Teams

Human role: the records clerk checks the classification and confirms registration of non-standard documents

KPI: time from receipt to registration, share of documents with no manual handling

Risks: misclassifying an important letter — a mandatory review queue for the “official” category

Complexity: Medium · **Priority:** High

Use case 2 · Meeting and calendar scheduling assistant

Process: EAs and administrators manually look for slots, book meeting rooms, reschedule meetings

Problem: dozens of “when works for you?” emails, double bookings, missed meetings

AI solution: a scheduling assistant analyzes attendees’ calendars, proposes slots factoring in priorities and time zones, books the room and sends the agenda

Tools: Reclaim, Clockwise, Calendly, Copilot/Gemini in the calendar

Integrations: Google Workspace / Microsoft 365, room-booking system

Human role: the EA sets priorities and confirms meetings for top executives

KPI: time to arrange a meeting, share of reschedules, meeting-room utilization

Risks: auto-rescheduling an important meeting — protected slots and manual confirmation for C-level

Complexity: Low · **Priority:** High

Use case 3 · Travel assistant: trips and expense reports

Process: the coordinator manually selects tickets and hotels, employees submit receipts on paper

Problem: selection takes hours, spending goes outside policy, expense reports are weeks late

AI solution: the assistant selects routes within the travel policy, while Document AI recognizes receipts from photos and assembles the expense report with entries for accounting

Tools: TravelPerk, Navan, Expensify, Google Document AI

Integrations: travel policy, accounting (BAS/1C), corporate cards, HRIS

Human role: the coordinator approves bookings, the accountant approves the final report

KPI: time to organize a trip, expense-report submission time, % of spend within policy

Risks: a misread receipt — spot reconciliation and an amount threshold for manual review

Complexity: Medium · **Priority:** High

Use case 4 · Office helpdesk bot for employees

Process: employees ask about certificates, passes, stationery, parking in messengers and in person

Problem: administrators answer the same questions dozens of times a day; requests get lost

AI solution: a bot in Slack/Teams answers from the knowledge base (FAQ, policies, instructions), files standard requests (certificate, pass, stationery) as tickets and shows their status

Tools: GPT bot on a knowledge base, Jira Service Management, Notion AI

Integrations: Slack/Teams, HRIS, access-control system (passes), request register

Human role: the office manager handles escalations and non-standard requests

KPI: first-response time, share of requests closed by the bot, employee satisfaction

Risks: a confident but wrong answer about policies — answers only with a link to the source in the knowledge base

Complexity: Low · **Priority:** High

Use case 5 · Auto-minutes of meetings and action-item control

Process: internal meetings run without minutes; action items are captured in attendees' notes

Problem: decisions are forgotten, no one tracks execution, the same questions are discussed again

AI solution: AI transcribes the meeting, produces minutes with decisions and action items (who/what/by when), creates tasks and reminds owners of deadlines

Tools: Fireflies, tl;dv, Copilot in Teams, ChatGPT

Integrations: Zoom / Meet / Teams, task tracker (Jira, Asana), calendar

Human role: the meeting secretary approves the minutes before sending them out

KPI: share of meetings with minutes, % of action items completed on time

Risks: confidential meetings — a list of meetings with no recording and a retention policy

Complexity: Medium · **Priority:** Medium

07 AI agents for the department

Agent	Task	Inputs	Output	Integrations
Mailroom Agent	classification and registration of incoming items	scans, email, attachments	document card + owner	email, EDM, register
Scheduling Agent	selecting slots and rooms	calendars, priorities	meeting + agenda	Workspace/M365
Travel Agent	routes and expense reports	request, policy, receipts	booking + report	TravelPerk, accounting
Helpdesk Agent	answers and tickets for employees	questions, knowledge base	answer or ticket	Slack/Teams, Jira SM
Minutes Agent	minutes and action-item control	meeting recording	minutes + tasks	Zoom, task tracker
Procurement Agent	stock and orders for the office	stock levels, spending history	draft order	sheets, suppliers

08 AI systems & tools

Category	Tools	Use for
LLM / assistant	ChatGPT Enterprise, Claude Team, Copilot, Gemini	letters, drafts, summaries, analysis
Document AI / OCR	Google Document AI, ABBYY FineReader	recognition of documents and receipts
Electronic document management	Vchasno, M.E.Doc, DocuSign	registration, signing, archive
Scheduling	Reclaim, Clockwise, Calendly	calendars, slots, meeting rooms
Travel & expense	TravelPerk, Navan, Expensify	trips, receipts, expense reports
Meeting AI	Fireflies, tl;dv, Copilot in Teams	minutes, action items
Workflow automation	Make, Zapier, Power Automate	connections between systems without code
Governance	corporate accounts, DLP, access policies	security of data and personal data

09 Integrations

System	Role	What it gives
Google Workspace / Microsoft 365	mail, calendars, documents	environment for scheduling and drafts
Electronic document management (EDM)	contracts, orders, acts	registration and signing control
Accounting (BAS / 1C)	invoices, expense reports	auto-entries from recognized documents
HRIS	employees, structure, leave	data for certificates and routing
Slack / Teams	channel for requests and notifications	helpdesk bot and deadline alerts
Travel services	tickets, hotels, transfers	booking within policy
Internal forms (requests)	stationery, passes, services	structured requests instead of emails

10 Department knowledge base

Section	What's stored
Document-flow regulations	routes, deadlines, owners by document type
Order and letter templates	approved wording, letterheads, signatories
Travel policy	limits, classes, approvals, expense-report rules
Lease and service contract register	terms, deadlines, contacts, renewal dates
Supplier contacts	cleaning, stationery, catering, repairs, couriers
Office FAQ	passes, parking, meeting rooms, equipment, delivery
Spending policies	procurement limits, who approves, documents for payment
Onboarding instructions	first day, access, workplace, certificates
Events calendar	corporate events, holidays, birthdays, guest visits

11 KPIs & impact metrics

Area	KPI
Document flow	time from receipt to registration, % of documents with no manual handling
Travel	time to organize a trip, expense-report submission time
Employee service	first-response time, share of requests closed by the bot
Costs	cost of admin processes per employee, % of spend within policy
Document quality	number of errors and returns for rework
Productivity	requests/documents per administrator, time spent on routine
AI quality	classification and recognition accuracy, share of accepted AI drafts

12 Risks & constraints

Risk	Control
Personal data in documents	corporate accounts, DLP, anonymization, access restrictions
Document misclassification	review queue for critical categories, spot checks
Wrong bot answers about policies	answers only from the knowledge base with a link to the source
Errors in recognized receipts and invoices	amount threshold for manual reconciliation, accountant control
Recordings of confidential meetings	list of meetings with no recording, attendee consent, retention period
Over-automation	signature, budget and decision always rest with a person
Dependence on knowledge-base quality	knowledge-base owner, regular review, policy versioning

13 90-day implementation plan

Period	Actions	Result
1-2 weeks	audit of document flow, requests, calendars and travel processes	an AI use-case map
2-4 weeks	assemble the knowledge base: regulations, policies, templates, FAQ, registers	a ready knowledge base
4-6 weeks	pilots: helpdesk bot, correspondence processing, expense reports	first measurable effects
6-10 weeks	integrations EDM + accounting + calendars + Slack/Teams, auto-minutes	semi-automatic workflows
10-12 weeks	policies, KPIs, roles, scaling to all offices	a managed AI administration system

14 Quick wins (first 30-60 days)

Initiative	Why it's fast
Helpdesk bot with office FAQ	knowledge base + a ready bot, no deep integrations
Auto-minutes of internal meetings	ready transcription services, effect from the first meeting
Receipt recognition for expense reports	ready mobile apps, instant time savings
AI drafts of letters and orders	approved templates + LLM
Auto-reminders about contract deadlines	register + simple rules in Make/Zapier

15 Mid-term initiatives

Initiative	What it gives
Full AI processing of incoming correspondence	registration and routing without manual work
Scheduling assistant for the whole company	less email, higher meeting-room utilization
Travel platform with policies and reports	controlled spending, fast business trips
A single employee-request portal	all admin services in one window with SLAs

16 Complex but high-value initiatives

Initiative	What it gives
End-to-end digital document flow with AI control	full paper elimination, an audit trail
Predictive procurement and office budget	orders before shortages, an accurate budget
Autonomous agents for standard admin processes	scale without admin-headcount growth
A single data layer (documents + requests + spending)	a full picture of admin operations for decisions

17 Summary roadmap

Initiative	Impact	Complexity	Prio	Timeline
Helpdesk bot for employees	–workload	Low	High	2–4 weeks
Incoming correspondence processing	–80% sorting time	Medium	High	3–6 weeks
Expense reports from receipts (OCR)	–errors, –time	Medium	High	2–4 weeks
Scheduling assistant	faster approvals	Low	High	1–3 weeks
Auto-minutes + action items	execution control	Medium	Medium	2–4 weeks
Travel platform with policies	cost control	Medium	Medium	4–8 weeks
Autonomous admin agents	scale	High	Medium	10–12+ weeks

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