Built AI Audit™

OPERATIONAL INTELLIGENCE AUDIT™ · DELIVERABLE 06 OF 07

SECTION 01

Blueprint Overview

A 12-month phased implementation plan moving from audit findings to operational AI workflows, with decision gates between each phase ensuring Hartwell maintains control over pace, scope and investment.

PHASE 1	PHASE 2	PHASE 3	ONGOING
Prove & Recover	**Visibility & Control**	**Extend & Integrate**	**Optimise**
Months 1–4	Months 5–8	Months 9–12	Month 12+

Workflows deployed	Decision gates	Target recovery	Admin hours released
6	3	£708k–£970k	2,880–3,840

Decision-gate model. Each phase ends with a formal review. Hartwell decides whether to proceed, adjust scope or pause before committing to the next phase. There is no obligation to proceed beyond Phase 1. This gives leadership full control over pace and investment while maintaining momentum.

SECTION 02

Phase 1 — Prove & Recover

Months 1–4. Deploy the two highest-priority workflows, demonstrate measurable recovery and establish the governance foundation for all future phases.

PHASE 1 **Prove & Recover** Months 1-4

Workflows

- Commercial Control Kit™
- Bidroom in a Box™

Target outcomes

Recover £350k–£477k in commercial value. Reduce tender admin by 30–40%. Process first AI-assisted tender within 4 weeks. Capture first structured variation within 6 weeks.

WEEK 1-2

Mobilisation & governance onboarding

Governance framework onboarding (30 min per user). Data classification training. Assumptions library setup. First tender pack selected for workflow deployment. Variation log baseline captured.

WEEK 3-4

First AI-assisted tender

First live tender processed through Bidroom in a Box™ workflow. Scope extraction, assumptions, clarifications and risk register produced. QS reviews and validates. Performance metrics captured against manual baseline.

WEEK 5-8

Commercial capture activation

Commercial Control Kit™ deployed on 3–5 priority contracts. Change event capture structured. First variation notice drafted through workflow. Evidence indexing established. Pipeline tracker activated.

WEEK 9-12

Workflow refinement & scaling

Both workflows refined based on user feedback. Assumptions library expanded. Tender workflow extended to all new tenders. Commercial capture extended to 8–10 contracts. First quarterly governance review conducted.

WEEK 13–16

Phase 1 review & results

Performance data compiled: tenders processed, time saved, variations captured, commercial recovery achieved. Results presented to leadership team. Phase 2 scope confirmed or adjusted.

Target recovery: **£350k–£477k / yr**

Admin hours released: **~1,200 hrs / yr**

G1

Decision Gate 1 — End of Month 4

Review Phase 1 results. Confirm Phase 2 scope, timeline and budget. Hartwell decides whether to proceed, adjust or pause. No obligation to continue.

GO / ADJUST / PAUSE

SECTION 03

Phase 2 — Visibility & Control

Months 5–8. Layer margin visibility and RAMS workflows onto the Phase 1 foundation, using the structured data now flowing from commercial capture and tender workflows.

PHASE 2 **Visibility & Control** Months 5–8

Workflows

- Operational Margin Cockpit™
- RAMS Factory™

Target outcomes

Reduce aged WIP by 25–35%. Cut CNI-to-invoice cycle from 34 days to under 14 days. Reduce RAMS production time by 40–50%. Produce first automated monthly margin snapshot.

MONTH 5

Margin reporting deployment

Sage 200 CVR export structured for automated processing. First monthly margin snapshot produced. CNI tracking activated. Aged WIP dashboard configured. Data from Phase 1 commercial capture feeds into variation pipeline view.

MONTH 6

RAMS workflow pilot

RAMS Factory™ deployed on 2–3 job types. Task-based RAMS generation tested. Hazard/control mapping validated by HSQE Manager. Governance controls from Deliverable 05 applied with additional H&S approval gate. Competent person review mandatory.

MONTH 7–8

Scaling & integration

Margin reporting extended across full contract portfolio. RAMS workflow extended to additional job types. Board reporting narrative automated. Second quarterly governance review conducted. Invoice readiness indicators embedded in monthly snapshots.

Additional recovery: **£227k–£312k / yr**

Admin hours released: **~1,080 hrs / yr**

G2

Decision Gate 2 — End of Month 8

Review cumulative results across Phase 1 and 2. Assess ROI, user adoption and governance effectiveness. Confirm Phase 3 scope or transition to managed operations model.

GO / ADJUST / MANAGED OPS

SECTION 04

Phase 3 — Extend & Integrate

Months 9–12. Deploy remaining workflows and transition from implementation to ongoing managed AI operations.

PHASE 3 **Extend & Integrate** Months 9–12

Workflows

- Invoice Readiness
- Service Desk AI Pack™

Target outcomes

Reduce invoice blocker deductions by 45–60%. Improve SLA compliance rate by 15–20%. Reduce service desk deductions by 25–40%. Establish managed operations cadence for all six workflows.

MONTH 9–10

Invoice readiness deployment

Evidence assembly workflow activated. PO validation and completion record linking established. Application pre-population deployed on 5–8 contracts. Blocker category tracking automated. Upstream data quality from Phase 1 and 2 workflows now provides cleaner inputs.

MONTH 10–11

Service desk pilot

Service Desk AI Pack™ deployed on 2–3 FM maintenance contracts. Priority classification rules configured against contractual SLA tiers. Dispatch-ready ticket format established. SLA countdown tracking activated. Response evidence workflow tested.

MONTH 12

Transition to managed operations

All six workflows operational. Annual governance framework review conducted. Managed operations cadence established: weekly workflow support, monthly performance review, quarterly governance review, annual framework refresh. Transition proposal presented.

Additional recovery: **£131k–£181k / yr**

Admin hours released: **~600 hrs / yr**

G3

Decision Gate 3 — End of Month 12

Full 12-month review. Transition decision: move to managed AI operations (ongoing support), bring workflows in-house, or define next phase of expansion (new use cases, additional contracts, deeper integration).

MANAGED OPS / IN-HOUSE / EXPAND

SECTION 05

Cumulative Impact

The total expected impact across all three phases of the 12-month blueprint.

METRIC	PHASE 1	PHASE 2	PHASE 3	12-MONTH TOTAL
Annual margin recovery	£350k-£477k	£227k-£312k	£131k-£181k	£708k-£970k
Admin hours released / yr	~1,200	~1,080	~600	2,880-3,840
FTE equivalent released	0.7	0.6	0.3	1.6-2.1
Workflows operational	2	4	6	6
Contracts covered	8-10	Full portfolio	Full portfolio + FM	Full portfolio

£708k–£970k

Estimated annual recoverable value

Against a £45m turnover, this represents a 1.6–2.2% margin improvement through operational efficiency, commercial recovery and admin reduction alone — before accounting for the revenue uplift from increased tender capacity (11 declined tenders = £836k potential pipeline).

These estimates are conservative and assume steady-state adoption. Actual recovery will depend on implementation quality, user adoption and commercial conditions.

SECTION 06

Dependencies & Risk Factors

What needs to be in place for the blueprint to succeed, and the key risks that could affect delivery.

DEPENDENCY	DETAIL	PHASE	RISK
Stakeholder availability	Estimating Lead, Commercial Director and HSQE Manager need to be available for workflow onboarding, review sessions and governance input. Estimated time commitment: 2–3 hours per week during Phase 1, reducing to 1 hour per week in Phase 2+.	All	Medium
Sage 200 data quality	Margin reporting workflows depend on clean CVR exports. Current exports require manual reconciliation. Data quality improvement should begin in Phase 1 for Phase 2 readiness.	Phase 2	Medium
Tender pipeline continuity	Bidroom in a Box™ benefits compound with volume. If tender pipeline drops below 4 tenders per month, the capacity benefit is reduced (though time saving per tender is maintained).	Phase 1	Low
CAFM access and export	Service Desk AI Pack™ requires structured ticket exports from Concept CAFM. Export format, access permissions and refresh frequency should be confirmed before Phase 3 begins.	Phase 3	Medium
Change management	Workflow adoption requires buy-in from operational teams. Early wins from Phase 1 (visible time savings, better tender outputs) are the strongest adoption driver.	Phase 2–3	Medium

DEPENDENCY	DETAIL	PHASE	RISK
	Resistance is most likely from teams not involved in Phase 1.		
Governance discipline	The framework (Deliverable 05) must be followed consistently. If governance controls are bypassed under time pressure, the framework loses credibility and risk increases.	All	Medium-High

Deliverable linkage. This blueprint is Deliverable 06 of 07. It translates the Prioritised AI Opportunity Roadmap (Deliverable 03) into a detailed implementation timeline. The governance controls applied at each phase are defined in Deliverable 05. The Phase 1 scope, pricing and KPI targets are set out in Deliverable 07 (Phase 1 Implementation Proposal). The maturity baseline is Deliverable 01 and the financial case is Deliverable 02. All seven deliverables should be read together.