Built AI

Audit™

OPERATIONAL INTELLIGENCE AUDIT™ · DELIVERABLE 03 OF 07

SECTION 01

Scoring Framework

Each AI opportunity is scored against six criteria on a scale of 1–5. The weighted total determines priority ranking and Phase 1 recommendation.

CRITERION	WEIGHT	WHAT IT MEASURES	SCORE INTERPRETATION
Commercial value	25%	Direct financial impact through recovered margin, reduced cost or increased revenue capacity	5 = £200k+ / yr 1 = <£25k / yr
Speed to benefit	20%	How quickly measurable improvement can be demonstrated after implementation begins	5 = <8 weeks 1 = 6+ months
Data readiness	20%	Whether the input data, documents and systems are available, structured and exportable	5 = Ready now 1 = Major gaps
Operational risk	15%	Disruption risk to existing workflows, teams and client relationships during implementation	5 = Minimal risk 1 = High disruption
Implementation complexity	10%	Technical complexity, integration requirements, change management and training burden	5 = Straightforward 1 = Complex
Governance requirement	10%	Level of approval, audit trail, compliance and oversight required for safe deployment	5 = Standard controls 1 = Heavy governance

Scoring note. Higher scores indicate more favourable conditions for implementation. A score of 5 on Operational Risk means the opportunity carries *minimal* risk — not high risk. Similarly, 5 on Governance Requirement means standard controls are sufficient. The scoring is designed so that the highest-ranked opportunities are the best places to start.

SECTION 02

Priority Ranking

Six AI opportunities ranked by weighted score. The top two are recommended for Phase 1 implementation.

#	OPPORTUNITY	COMMERCIAL 25%	SPEED 20%	DATA 20%	RISK 15%	COMPLEX 10%	GOVERN 10%
1	**Commercial capture & variation recovery** Structured change event capture, notice automation, evidence indexing and variation narrative generation	5	4	4	5	4	3
2	**Tender production & bid automation** Scope extraction, assumptions library, compliance pre-fill, QA checklist generation and tender assembly	4	5	5	5	4	4
3	**Margin reporting & WIP visibility** Automated monthly margin snapshots, CNI tracking, invoice readiness dashboards and board narrative	4	4	3	4	3	4
4	**RAMS & compliance automation** Task-based RAMS generation, hazard/control	3	4	3	3	3	2

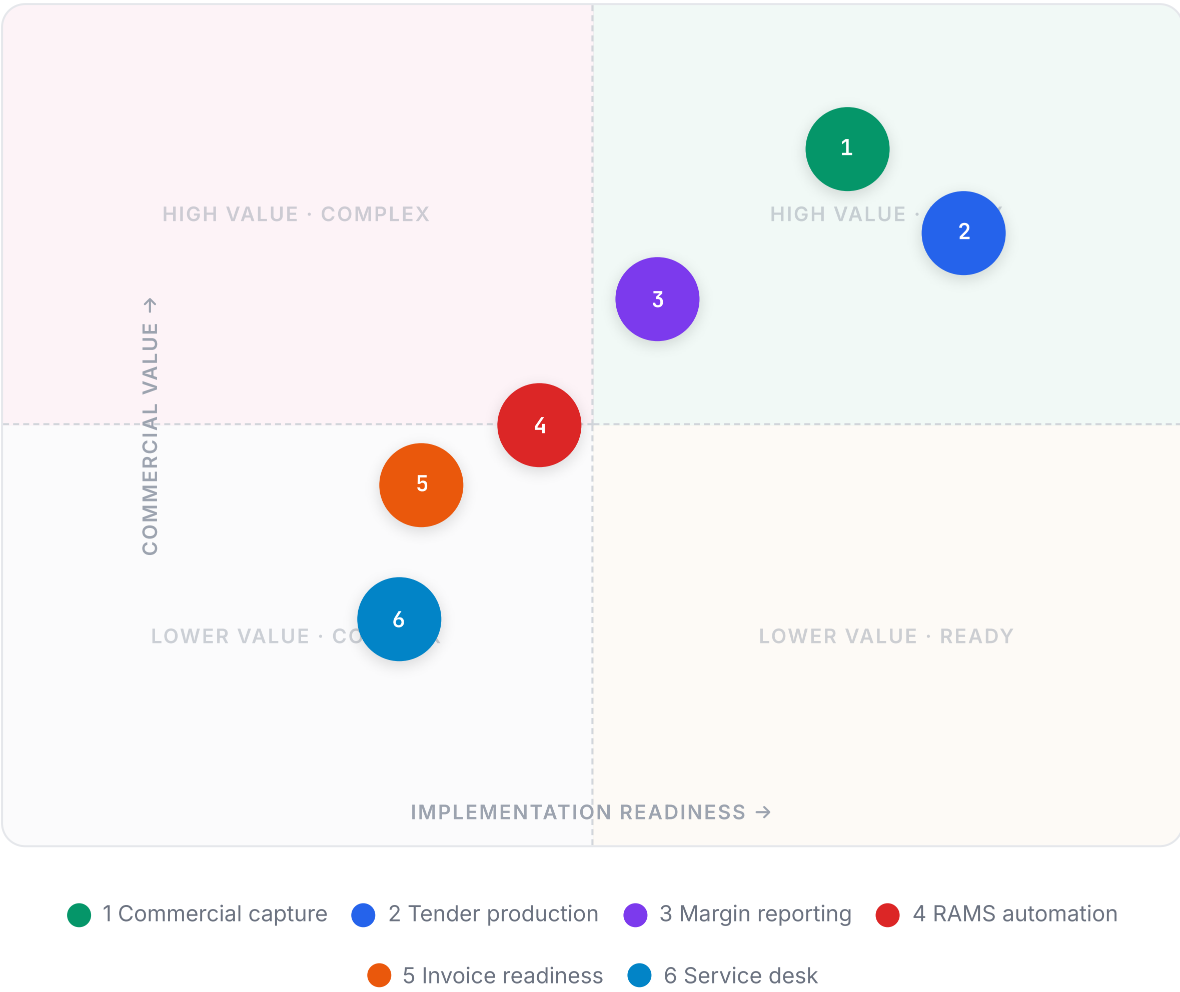
#	OPPORTUNITY	COMMERCIAL 25%	SPEED 20%	DATA 20%	RISK 15%	COMPLEX 10%	GOVERN 10%
	mapping, COSHH indexing and permit checklists						
5	**Invoice readiness & application support** Evidence assembly, PO validation, completion record linking and application pre-population	3	3	2	3	2	3
6	**Service desk triage & SLA evidence** Priority classification, dispatch-ready ticketing, SLA tracking and deduction evidence packs	2	3	2	3	2	3

Phase 1 recommendation. Opportunities 1 and 2 — **commercial capture & variation recovery** and **tender production & bid automation** — are recommended for Phase 1 implementation. Together they target the two largest leakage categories (£620k + £340k = £960k annually), have the strongest data readiness, carry the lowest operational risk, and can demonstrate measurable benefit within 8–12 weeks of implementation.

SECTION 03

Value vs. Readiness Matrix

Plotting each opportunity by commercial value (vertical) against implementation readiness (horizontal) to visualise priority positioning.



SECTION 04

Opportunity Profiles

Detailed assessment of each opportunity, including the workflow it maps to, the leakage it addresses, scoring rationale and implementation considerations.

1

Commercial Capture & Variation Recovery

Structured change event capture, automated notice drafting, evidence indexing and variation narrative generation

Phase 1

COMMERCIAL VALUE	5.0
SPEED TO BENEFIT	4.0
DATA READINESS	4.0
OPERATIONAL RISK	5.0
IMPLEMENTATION COMPLEXITY	4.0
GOVERNANCE REQUIREMENT	3.0

This opportunity directly addresses the largest single leakage category identified in Deliverable 02 — **£620k in missed commercial recovery**. The root causes are structural: late notice, fragmented evidence, manual narrative assembly and no pipeline visibility. All of these are addressable through AI-assisted workflow without changing the commercial team's role or requiring system integration.

The variation log and existing evidence (emails, photographs, site records) provide sufficient input data for an AI workflow to structure change event capture, draft contractual notices against template clauses, assemble evidence packs and generate cause-and-effect narratives for QS review. The commercial team retains full review and approval control.

Why it scores highest on commercial value: £620k leakage with 40–55% recovery potential = £248k–£341k recoverable. At this level, the workflow pays for itself within the first quarter of recovered variations alone.

Commercial Control Kit™

Recoverable: **£248k–£341k / yr** · Timeline: **6–9 months**

Tender Production & Bid Automation

2

Scope extraction, assumptions library, compliance pre-fill, QA checklist generation and structured tender assembly

Phase 1

COMMERCIAL VALUE 4.0	SPEED TO BENEFIT 5.0
DATA READINESS 5.0	OPERATIONAL RISK 5.0
IMPLEMENTATION COMPLEXITY 4.0	GOVERNANCE REQUIREMENT 4.0

Tender production is the highest-readiness opportunity in the portfolio. **Data is immediately available** — tender packs are self-contained document sets that require no system integration. The workflow operates alongside the existing estimating process rather than replacing it, making operational risk minimal.

The 40% admin burden identified in Deliverable 02 (38 hours per tender on repetitive work) is directly addressable through AI-assisted scope extraction, assumptions generation, compliance pre-population and QA checking. Reducing this burden by 30–40% would release 11–15 hours per tender — enough to increase capacity by 15–20 tenders per year without additional headcount.

Why it scores highest on speed: No system integration required. Tender packs are the input. Structured outputs are the deliverable. The first AI-assisted tender can be run within 4 weeks of implementation start. The 11 tenders declined for capacity reasons represent £836k in potential revenue.

Bidroom in a Box™

Recoverable: **£102k–£136k / yr** + capacity gain · Timeline: **3–6 months**

3

Margin Reporting & WIP Visibility

Automated monthly margin snapshots, CNI tracking, aged WIP dashboards, invoice readiness and board reporting narrative

Phase 2

COMMERCIAL VALUE 4.0	SPEED TO BENEFIT 4.0
DATA READINESS 3.0	OPERATIONAL RISK 4.0
IMPLEMENTATION COMPLEXITY	GOVERNANCE REQUIREMENT

3.0	4.0

Margin reporting targets the £410k aged WIP and CNI drag plus the £165k reporting overhead identified in Deliverable 02. The opportunity is strong but scores lower on data readiness because the Sage 200 CVR export requires manual reconciliation with contract-level data held in spreadsheets. Phase 1 implementation of commercial capture and tender workflows will improve data quality, making this workflow more effective when deployed in Phase 2.

Phase 2 rationale: The reporting workflow benefits from the structured data produced by Phase 1 workflows. Deploying it second creates a natural data pipeline: commercial events captured in Phase 1 feed directly into margin visibility in Phase 2.

Operational Margin Cockpit™

Recoverable: **£227k–£312k / yr** · Timeline: **3–6 months** (after Phase 1)

4

RAMS & Compliance Automation

Task-based RAMS generation, hazard/control mapping, COSHH indexing, permit checklists and briefing records

Phase 2

COMMERCIAL VALUE	3.0
SPEED TO BENEFIT	4.0
DATA READINESS	3.0
OPERATIONAL RISK	3.0
IMPLEMENTATION COMPLEXITY	3.0
GOVERNANCE REQUIREMENT	2.0

RAMS automation has strong speed potential but carries a heavier governance burden than commercial or tender workflows. Safety documentation requires competent review, approval gates and clear audit trails. The lower governance score reflects the additional controls needed — not a barrier, but a factor that makes Phase 2 more appropriate after governance frameworks (Deliverable 05) are established.

Value driver: Primarily efficiency (1,730 annual hours on RAMS production) rather than direct margin recovery. The commercial case is strongest when combined with mobilisation speed improvement and compliance quality gains.

RAMS Factory™

Efficiency gain: **~690 hrs / yr** · Timeline: **3–6 months** (after governance)

Invoice Readiness & Application Support

5 Evidence assembly, PO validation, completion record linking, application pre-population and blocker tracking

Phase 3

COMMERCIAL VALUE	3.0	SPEED TO BENEFIT	3.0
DATA READINESS	2.0	OPERATIONAL RISK	3.0
IMPLEMENTATION COMPLEXITY	2.0	GOVERNANCE REQUIREMENT	3.0

Invoice readiness scores lower on data readiness because the current evidence (photographs, completion records, PO references) is fragmented across multiple systems and personal devices. The workflow requires upstream data improvements — particularly completion record discipline and PO management — before AI automation adds maximum value. Phase 1 and 2 workflows will improve the data environment for this opportunity.

Operational Margin Cockpit™

Recoverable: **£106k–£141k / yr** · Timeline: **Phase 3**

6 **Service Desk Triage & SLA Evidence**

Priority classification, dispatch-ready ticketing, SLA countdown tracking and deduction challenge evidence

Phase 3

COMMERCIAL VALUE	2.0	SPEED TO BENEFIT	3.0
DATA READINESS	2.0	OPERATIONAL RISK	3.0
IMPLEMENTATION COMPLEXITY	2.0	GOVERNANCE REQUIREMENT	3.0

Service desk triage has the smallest financial impact (£100k in SLA deductions) and the most complex data environment (Concept CAFM integration, real-time ticket routing, engineer attendance tracking). It is a genuine opportunity but delivers best value once the foundational data, governance and workflow patterns are established through earlier phases.

Service Desk AI Pack™

Recoverable: **£25k–£40k / yr** · Timeline: **Phase 3**

SECTION 05

Phased Implementation Summary

How the six opportunities sequence into a 12-month transformation roadmap, with each phase building on the data, governance and workflow patterns established in the previous phase.

PHASE 1 Months 1–4

Prove & Recover

Deploy commercial capture and tender workflows. Demonstrate measurable recovery and efficiency gains.

- Commercial Control Kit™
- Bidroom in a Box™

Target recovery

£350k–£477k / yr

PHASE 2 Months 5–8

Visibility & Control

Layer margin visibility and RAMS workflows onto Phase 1 foundations. Structured data from Phase 1 feeds directly into reporting.

- Operational Margin Cockpit™
- RAMS Factory™

Additional recovery

£227k–£312k / yr

PHASE 3 Months 9–12

Extend & Integrate

Invoice readiness and service desk workflows benefit from improved upstream data quality and established governance patterns.

- Invoice Readiness
- Service Desk AI Pack™

Additional recovery

£131k–£181k / yr

Total estimated recovery across all three phases (12 months)

£708k–£970k / year

Sequencing logic. Phases are not arbitrary time blocks. Each phase creates data, workflow patterns and governance foundations that make the next phase more effective. Commercial capture (Phase 1) generates structured event data that feeds into margin reporting (Phase 2). Tender workflows (Phase 1) establish AI governance patterns that RAMS workflows (Phase 2) can follow. Deploying in this sequence maximises cumulative value and minimises re-work.

SECTION 06

Methodology & Linkage

How the roadmap was compiled and how it connects to the other audit deliverables.

INPUT SOURCE	HOW IT WAS USED
Deliverable 01 — AI Maturity Scorecard	Domain maturity scores informed data readiness and governance requirement ratings for each opportunity
Deliverable 02 — Margin Leakage Analysis	Leakage values provided the commercial value scoring inputs. Recovery estimates set the financial targets per opportunity
Stakeholder interviews	Speed to benefit and operational risk scores were validated with the MD, Commercial Director and Estimating Lead
Document & data review	Implementation complexity scores were based on actual system exports, document quality and integration requirements assessed during the audit
Built AI workflow library	Each opportunity was mapped to the most appropriate Built AI workflow pack based on scope, data requirements and delivery model

Deliverable linkage. This roadmap is Deliverable 03 of 07. It draws on the maturity assessment (Deliverable 01) and margin leakage analysis (Deliverable 02) to rank opportunities. The controlled prototype (Deliverable 04) demonstrates the top-ranked opportunity in practice. The governance framework (Deliverable 05) defines the controls needed for safe deployment. The 12-month blueprint (Deliverable 06) translates this roadmap into a detailed timeline. The Phase 1 proposal (Deliverable 07) provides scope, pricing and KPI targets for the first implementation phase. All seven deliverables should be read together.

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Built AI Ltd — Operational Intelligence Audit™ · Heat Map™ — Prioritised AI Opportunity Roadmap

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This document is an illustrative example. Final audit outputs are tailored to each client's workflows, data, systems and commercial priorities.

Scoring and ranking are based on audit evidence and stakeholder validation. Actual implementation outcomes depend on scope, adoption and operational factors.