AI Capability Baseline Summary

[redacted]

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Engagement Level 1 of the Strategic Bionic Framework™, the AI Capability Baseline
Owner goal Smoother operations, better delivery predictions, and room to grow sales past $3M

This summary is a plain, priced-from picture of where hours, money, and trust leak out of the business, and what to do first. Numbers are kept deliberately conservative. Read this to decide whether the priority moves are worth the spend.

1. Business profile

[redacted] sells new and fully refurbished appliances to retail walk-in customers, with a growing niche serving property managers and landlords. Every used appliance is reconditioned, cleaned, and tested before it reaches the floor, and the company positions itself as a major appliance recycler that keeps scrap out of landfills.

The shop runs about 10 people across showroom and sales, intake and refurbishment, a full-service repair team with more than 15 years of experience, a delivery and installation crew, recycling and logistics, and front-desk phone and customer service. Reviews single out a sales rep named Michelle and consistently praise the delivery team.

This year's number: sell more than $3 million. **Key person:** Michelle runs the manager role. She answers the phones and coordinates the whole delivery and service operation, and almost everything waits on her.

The three engines, at altitude:

- **How they win customers:** walk-in retail buyers, plus referrals and direct calls from property managers. All lead handling is manual.
- **How they deliver:** the order goes on a schedule board and is slotted for delivery as soon as possible or as requested.
- **How they support:** customers and property managers call in, and Michelle works each issue personally.

Weakest engine in the owner's own words: delivery scheduling and the issues that come up after the sale. That is where the deep dive went.

2. Master pain-point list

Ranked by combined time cost and risk, highest first. Items tagged Both are draining hours and creating errors at the same time.

#	Workflow	Tag	What it costs	Who it hits
1	Delivery scheduling and travel-time guesswork. Michelle works out the A to B to C route and timing by hand in Google Maps, then slots it on the board.	Both	Breaks almost daily. Drives missed windows. The owner would fix this one tonight.	Michelle, the crews, every customer waiting
2	Miscommunication with the delivery and service crews working off printed, already-stale schedules.	Both	Rework, wasted trips, weekly slips. Late or missed service.	Crews and customers
3	Re-keying the same job across the order system, the customer database, and the schedule.	Time Sink	Duplicate typing every order. Entry errors carry downstream.	Michelle and front desk
4	Phones and scheduling sit on one person. Michelle answers calls and coordinates everything.	Time Sink	Key-person bottleneck. If she is out, almost everything stops.	Michelle, the whole shop
5	No time to check work, so errors reach customers. Something slips every week.	Quality Risk	Weekly customer-facing mistakes, lost trust.	Customers and the brand
6	Manual invoicing. Property managers are billed by hand and pay late.	Both	Cash stuck in late receivables. Hand entry invites errors.	Cash flow
7	Manual lead handling and follow-up for landlords and property managers.	Time Sink	Growth the owner wants but cannot reach for lack of time.	The growth plan

3. AI opportunity map and Opportunity Matrix

Each pain point above pairs with a candidate AI use case, then sits in the matrix by impact and effort. Impact runs up the side, effort runs across the bottom.

HIGH IMPACT	**Quick Wins** *High impact, low effort. Do first.* • Delivery scheduling and route automation (strongest) • Live digital dispatch for the crews • Automated delivery-window texts (human-approved) • MFA and access control on the POS (security first)	**Big Bets** *High impact, high effort. Plan toward.* • Order to schedule data sync across systems • Lead capture and follow-up for landlord outreach • AI call-handling assist (internal first)
LOW IMPACT	**Fill-ins** *Low impact, low effort. When convenient.* • Automated invoicing and payment reminders	**Money Pits** *Low impact, high effort. Park or drop.* • Fully autonomous customer-facing AI agent (owner prefers people on customer-facing roles)
	LOWER EFFORT	**HIGHER EFFORT**

Plotting worksheet

#	Candidate AI use case	Linked pain point	Tag	Impact	Effort	Quadrant
1	Delivery scheduling and route / travel-time automation	Daily scheduling and travel-time guesswork	Both	High	Low	**Quick Win**
2	Live digital dispatch for delivery and service crews	Printed, stale schedules and crew miscommunication	Both	High	Low	**Quick Win**
3	Automated delivery-window notifications (human-approved templates)	Late and missed delivery windows	Quality Risk	High	Low	**Quick Win**
4	MFA and role-based access on the POS	Open access to sensitive data, no MFA	Quality Risk	High	Low	**Quick Win**
5	Order to schedule data sync across systems	Re-keying order, customer database, schedule	Time Sink	High	High	**Big Bet**
6	Lead capture and follow-up automation	Manual lead handling, missed landlord growth	Time Sink	Med	High	**Big Bet**
7	AI call-handling assist (internal first)	Phones bottlenecked on one person	Time Sink	High	High	**Big Bet**
8	Automated invoicing and payment reminders	Manual billing, late property-manager payment	Both	Low	Low	**Fill-in**

#	Candidate AI use case	Linked pain point	Tag	Impact	Effort	Quadrant
9	Fully autonomous customer-facing AI agent	Phone and support load (owner resists for now)	Time Sink	Low	High	**Money Pit**

Strongest Quick Win: delivery scheduling and route automation
It is the workflow the owner said she would fix tonight, it breaks almost daily, it sits on one person, and it drives the exact win she wants to show the owner: smoother operations and better delivery predictions. High impact, low effort, and it earns trust fast. Everything else in the 60-day stack builds on it.

4. ROI forecast

Labor basis from the interview: 2 people, about 40 hours a week each on the workflows discussed, at a role cost of $80,000 a year. That works out to roughly $38 an hour ($80,000 divided by 2,080 hours), which is the conservative rate used below.

The hours recovered are conservative estimates of waste removed, not the full time spent on each task. Confirm the recovery hours with the owner before presenting these as firm.

Priority move	Conservative arithmetic	Annual saving
Delivery scheduling and route automation	About 8 hours a week of Michelle's time recovered, times 1 person, times $38 an hour, times 50 weeks (8 x 1 x 38 x 50).	**$15,200**
Order to schedule data sync	About 4 hours a week of re-keying removed, times 1 person, times $38 an hour, times 50 weeks (4 x 1 x 38 x 50).	**$7,600**
Live digital dispatch for crews	About 3 hours a week of back-and-forth removed, times 1 person, times $38 an hour, times 50 weeks (3 x 1 x 38 x 50).	**$5,700**
Conservative annual range for the priority moves		**$15k to $28k**

Revenue uplift (softer number). The owner said freed-up time would go to sales, specifically reaching more landlords and property managers. That is real upside, but no value-per-hour was given, so it is not counted in the range above. It is listed in Open questions for the owner to confirm.

5. Security and AI governance baseline

Current posture in plain terms, with the gaps that must be closed before any AI is switched on.

- **Crown-jewel data:** customer records and financials live in the POS system.
- **Access and multi-factor:** any employee can reach the sensitive data, and multi-factor is not turned on. This is the single biggest exposure.

- **Backup and ransomware:** no backup or recovery plan surfaced. If locked out, the fallback is running orders by hand. High exposure, must be addressed.
- **Shadow AI:** none known to the owner today. Worth a light check with the team as tools get introduced.
- **Compliance:** no formal industry or contractual obligations stated.

> **Must close before any AI is switched on**
> 1. Turn on multi-factor authentication for the POS and any system holding customer or financial data.
> 2. Restrict POS access by role so not every employee can reach everything.
> 3. Stand up and test a real backup so a lockout is an inconvenience, not a shutdown.

6. 60-day priority stack

Sequenced. Security gaps close first, then the strongest Quick Win, then the moves that build on it.

1. **Close the security gaps (week 1 to 2).** MFA, role-based POS access, and a tested backup. Low effort, removes the biggest exposure, and clears the path for everything after it.
2. **Automate delivery scheduling and route timing (the strongest Quick Win).** Replace the by-hand Google Maps calculation and the board with a tool that proposes the route, the realistic travel time, and the slot. Unlocks Michelle's time and fixes the daily failure point.
3. **Put the crews on a live digital schedule.** Retire the printed sheets so the delivery and service teams always see the current plan. Kills the miscommunication and the stale-paper rework.
4. **Add human-approved delivery-window notifications.** Automatic texts confirming windows and flagging delays, using approved templates with a person able to step in. Directly cuts the late-delivery complaints.

7. Voice and trust rules

- **Tone:** if AI ever speaks to customers, it should sound like a helpful human.
- **Hard line:** the owner believes customers do not want to deal with AI. People stay on all customer-facing and customer-service roles.
- **Human in the loop:** early AI is back-office only, scheduling, dispatch, and data work. Any customer message goes out on an approved template with a person able to intervene.

8. Productization and growth upside

Upside beyond the core fixes, not part of the 60-day stack.

- **Brand and history are the edge.** Little is packaged today. The reputation and the proven refurbishment process are the defensible assets. Documenting the refurbishment method could turn tribal know-how into a repeatable standard later.

- **Under-served channel:** the landlord and property-manager segment the owner wants to chase but cannot reach for lack of time. Freeing Michelle's hours is what makes that growth possible.

9. Open questions and budget

What still needs confirming before the plan is firm. Every number the ROI leans on is flagged here.

- **Recovery hours per move.** The 8, 4, and 3 hours-a-week figures are conservative estimates. Confirm with the owner.
- **Time split.** Area 6 noted a 10% figure for real work versus admin. It was ambiguous in the room. Confirm whether 10% is the real-work share or the admin share.
- **Value per hour of reinvested sales time.** Needed to put a number on the revenue uplift. Not yet given.
- **POS system name and whether it has an API.** This drives how much effort the order-to-schedule sync really takes.
- **Backup status.** Is there any backup in place today, or none at all?
- **Delivery volume per week.** Number of deliveries sizes the scheduling automation.

Sign-off: Michelle signs off together with the owner.

Timeline: 90 days to a more efficient service and delivery system that can support growing sales.

Budget signal: no set budget, but the owner would pay a few thousand dollars to solve this. Worth weighing against a conservative $15k to $28k a year in recovered time. The phased stack lets the first Quick Win prove value before any larger spend.