

ALSTON AI ADVISORY

A·I·M Framework · Workflow Assessment Report · Sample

One workflow. Clear evidence. A practical path forward.

ILLUSTRATIVE SAMPLE — Fictional client and workflow. This sample shows the structure and level of detail a client would receive; actual findings depend on the workflow, systems, data, and stakeholders reviewed.

01 · ASSESSMENT AT A GLANCE

Sample client	Harbor & Pine Services, a 42-person professional services firm
Workflow assessed	Client inquiry → qualification → proposal → approval → send
Business objective	Reduce proposal turnaround time without lowering review quality or exposing customer information.
Stakeholders	Sales lead · Operations manager · Proposal coordinator
Current AI tools	Microsoft 365 Copilot available to licensed users; usage is inconsistent.
Assessment scope	One workflow, one primary team, up to 3 stakeholders.
How the assessment ran	Intake received · 60-minute discovery with 3 stakeholders · report delivered in 5 business days · 45-minute readout

02 · EXECUTIVE SUMMARY

What we found. The biggest delay is not proposal writing itself. It is the handoff between qualification, gathering prior examples, and manager approval. Staff rebuild context manually, search multiple folders, and wait for approval before sending.

What we recommend. Standardize intake, use approved AI to summarize the request and draft from approved source material, keep pricing and final commitments human-controlled, and create a defined approval checkpoint before anything leaves the business.

Expected result. Shorter cycle time, fewer back-and-forth handoffs, more consistent proposal quality, and clearer ownership of AI-assisted work.

Bottom line: AI is a fit for drafting and pulling request details together in this workflow. It should not make pricing decisions, approve commitments, or send customer-facing output without human review.

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Current state before recommending a fix.

03 · WHAT WE HEARD

- Proposal turnaround ranges from 2 hours to 2 business days depending on who owns the request and how easy prior examples are to find.
- Customer details arrive through email, web forms, and meeting notes, so the proposal coordinator often rebuilds the same context manually.
- The sales lead sometimes uses Copilot to draft language, but there is no shared workflow for what AI may access, how output is checked, or who owns the final result.
- Pricing and contractual language must be approved by a manager before the proposal is sent.
- The team wants faster turnaround, but does not want AI to introduce incorrect promises or expose customer information.

04 · CURRENT-STATE WORKFLOW MAP

Current-state business-process map

1. INQUIRY	2. QUALIFY	3. BUILD	4. APPROVE	5. SEND
Email / form / meeting notes Sales	Manual review + follow-up Sales	Search examples + draft Coordinator ▲ Context rebuilt	Pricing + language review Manager ▲ Approval comes late	Manual email + filing Sales

Observed pattern: context is recreated between steps 2 and 3, and approval waits until the draft is nearly complete. Amber markers show where time is lost.

05 · ROOT-CAUSE FINDINGS

Finding	Evidence	Business impact	Priority
Context is fragmented	Request details live across email, notes, and shared folders.	Coordinator spends time reconstructing information before drafting.	High
No standard draft starting point	Prior proposals are searched manually and used inconsistently.	Quality and turnaround vary by employee.	High
Approval happens late	Manager review begins after a full draft exists.	Rework increases when pricing or commitments need correction.	High
AI use is informal	Some staff use Copilot, but rules and review expectations are not built into the workflow.	Risk of inconsistent output and uncertainty about acceptable use.	Medium

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Where AI helps, and where it should stop.

06 · AI AND AUTOMATION FIT

Strong fit	Summarize approved intake information; retrieve approved prior examples; generate a first draft from a controlled template; suggest follow-up questions when required information is missing.
Human-owned	Qualification decision; pricing; legal/contractual commitments; final factual review; approval to send.
Not recommended	Autonomous customer communication, unreviewed proposal generation, or use of unapproved personal AI accounts with customer data.

07 · GOVERNANCE, RISK AND RECOMMENDED CONTROLS

- Use only company-approved AI accounts and approved connections to business systems.
- Define which customer information may be used through approved connections and what must never be pasted manually.
- Require a named human owner for every customer-facing proposal, regardless of how much AI contributed.
- Keep pricing, contractual commitments, and final approval outside autonomous AI decision-making.
- Add a standard quality check: facts, pricing, customer names, dates, scope, and promised deliverables.
- Note when AI wrote part of the draft so reviewers know what to check closely.

This assessment identifies governance and risk considerations and recommends controls. It is not a legal, regulatory, or compliance opinion.

08 · RECOMMENDED FUTURE-STATE WORKFLOW

Future-state business-process map

1. INTAKE Standard form + required fields Sales ▲ Standardized	2. SYNTHESIZE AI summary + missing-info check Approved AI ▲ New step	3. DRAFT Template + approved examples Coordinator + AI ▲ Starts from template	4. REVIEW Facts + price + commitments Manager	5. SEND + LOG Human send + central filing Sales
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Design principle: AI reduces manual synthesis and drafting. Humans retain ownership of qualification, commitments, approval, and the customer relationship. Amber markers show what changed.

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What it would take to implement the recommendation.

09 · IMPLEMENTATION REQUIREMENTS AND DEPENDENCIES

Workflow changes	Create one intake standard; define a proposal template; move manager review earlier for pricing/commitment exceptions.
System readiness	Confirm where approved proposal examples live and whether the AI platform can access that source through an approved connection.
Data readiness	Identify which customer fields are required, which are sensitive, and who owns their accuracy.
Enablement	Train the team on the redesigned workflow, approved AI uses, review checklist, and escalation path.
Ownership	Name a workflow owner responsible for template quality, approved source material, and monthly feedback.
Validation before launch	Security/privacy owner confirms approved tool configuration and data-handling rules.

10 · WHAT A PILOT WOULD LOOK LIKE

Prepare	Confirm intake fields, source folders, data rules, and the proposal template.
Pilot	Test on 3 to 5 past proposals, then run a limited live pilot with the team.
Review	Check quality, cycle time, and user feedback before broader use.

Timing and detailed steps are confirmed during implementation planning.

11 · MEASUREMENT PLAN

Measure	Baseline	Target / signal	Source
Adoption · New workflow use	Inconsistent	60% of eligible proposals use the new workflow within 30 days	Usage / team tracking
Efficiency · Proposal cycle time	2 hrs–2 days	Median turnaround under 1 business day, with no increase in rework	CRM / timestamps
Efficiency · First-draft preparation time	Not tracked	Team reports about 30% less time per draft after the pilot	Short pulse survey
Efficiency · Approval rework	Frequent exceptions	Fewer than 1 in 5 drafts need pricing or scope corrections	Manager log
Sentiment · Trust and confidence	Unknown	8 of 10 users say they know where AI helps and where review is required	Pulse survey
Quality · Output spot checks	Variable	9 of 10 monthly spot checks pass for accuracy and completeness	Monthly sample review

Adoption, efficiency, and sentiment are the three A·I·M measurement layers. Output quality is reviewed alongside them. Targets are illustrative and set with the client.

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Decision and next step.

12 · RECOMMENDED NEXT STEP

Proceed with a limited implementation pilot for this workflow using the company's existing approved AI platform, provided your security or privacy owner confirms the proposed data access and how the AI tool connects to your files.

- Do not purchase another AI platform until the existing approved tool is tested against the redesigned workflow.
- Start with one proposal type or one sales segment to keep the pilot controlled.
- Use the measurement plan above to decide whether the workflow should expand, change, or stop.
- If additional workflows surface during implementation, treat them as separate starting-point engagements or move into the A·I·M Program when the need becomes broader.

13 · WHAT THIS ASSESSMENT DOES NOT INCLUDE

- Technical implementation or custom integration development.
- Formal legal, regulatory, or compliance opinions.
- Vendor procurement or contract negotiation.
- Ongoing adoption measurement after the assessment.
- Assessment of additional workflows or teams.

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Readout and assessment assumptions.

14 · CLIENT READOUT AGENDA

10 min	Confirm business objective and current-state findings.
15 min	Walk through root causes, AI/automation fit, and governance considerations.
10 min	Review future-state map and implementation requirements.
5 min	Review measurement plan.
5 min	Agree on the next step or decide not to proceed.

A good assessment can end with “do nothing.” The goal is evidence and a practical decision, not a longer engagement.

15 · ASSESSMENT ASSUMPTIONS

- This sample assumes the client has one clearly bounded workflow and provides the requested intake materials before discovery.
- The assessment relies on stakeholder interviews, workflow artifacts, approved system information, and the evidence available during the engagement.
- Where a privacy, security, regulatory, or legal question requires formal determination, the assessment flags it for the client's appropriate advisor or owner.
- Implementation effort, software configuration, integrations, and ongoing measurement are scoped separately after the assessment if the client chooses to proceed.

Want this for one of your workflows? Learn more and get started at alstonai.co