



**PEAK AUTOMATION**

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# **AI BUSINESS AUTOMATION IMPACT ASSESSMENT**

Prepared for

**Meridian Service Group**

*A Regional Multi-Location Field Services Organization*

Prepared by Peak Automation | August 2026

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## **SAMPLE DELIVERABLE**

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*This document is an illustrative example of a Peak Custom Impact Assessment deliverable. Meridian Service Group is a fictional composite organization; all findings, figures, and recommendations are dummy data provided for demonstration purposes only.*



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## 1. Executive Summary

Meridian Service Group is a regional, multi-location field services organization operating across six branches, with annual revenue in the \$28–35 million range and a workforce of approximately 120 field and office personnel. This assessment evaluates the organization's operational maturity across six internal-function dimensions, independent of and unrelated to lead generation or inbound-call handling, to identify where automation and workflow redesign can materially reduce cost, error, and administrative burden.

Meridian's overall operational maturity score is 2.2 out of 5 (“Developing”). The organization has functional, if largely manual, processes across most departments, with meaningful inconsistency between locations and heavy reliance on individual staff knowledge rather than documented, repeatable systems.

### Dimension Scores

| Operational Dimension                 | Score | Maturity Level |
|---------------------------------------|-------|----------------|
| Scheduling & Dispatch Operations      | 2 / 5 | Developing     |
| Inventory & Equipment Management      | 2 / 5 | Developing     |
| Compliance & Reporting                | 3 / 5 | Defined        |
| Administrative & Data Entry Workflows | 1 / 5 | Initial        |
| Cross-Department Communication        | 2 / 5 | Developing     |
| Technology & Systems Infrastructure   | 3 / 5 | Defined        |

### Key Findings

- Dispatch scheduling is coordinated primarily by phone and a shared spreadsheet, with no single system of record across branches.
- Equipment and parts inventory is tracked manually at four of six locations, contributing to recurring stockouts and unrecorded losses.
- Compliance documentation exists and is generally followed, but formatting and retention practices vary meaningfully by branch.
- Administrative staff spend a disproportionately share of their time re-entering the same data across multiple disconnected systems.
- No shared, real-time visibility exists between dispatch, warehouse, and billing functions, producing delays and duplicated effort.

### Priority Quick Wins

Five initiatives were identified that can be implemented within 90 days with low-to-moderate effort and immediate operational impact. These are detailed in Section 5.

## 2. Methodology

This assessment was conducted through a combination of document review, department-head interviews, and direct observation of day-to-day workflows across representative branch locations. Findings were synthesized into six operational dimensions, each scored on a five-point maturity scale.

| Score | Definition                                                                                                 |
|-------|------------------------------------------------------------------------------------------------------------|
| 1     | Initial — Ad hoc, undocumented, dependent on individual memory rather than process.                        |
| 2     | Developing — Some structure exists; inconsistently applied across locations or shifts.                     |
| 3     | Defined — Documented processes in place; followed consistently within individual departments.              |
| 4     | Managed — Standardized organization-wide; measured, monitored, and adjusted on a regular cadence.          |
| 5     | Optimized — Continuously improved; integrated across departments with proactive, data-informed adjustment. |

Scoring reflects the current, observed state of each function — not the capability of any individual system or employee, but the consistency, documentation, and integration of the process. A low score indicates opportunity, not fault; most organizations at Meridian's stage of growth carry similar gaps, since processes that worked at a single-location scale typically were never redesigned as the organization expanded.

## 3. Current-State Findings by Function

The following sections detail findings for each of the six operational dimensions assessed, including supporting evidence, associated risk if left unaddressed, and specific recommendations.

### 3.1 Scheduling & Dispatch Operations — Score: 2 / 5 (Developing)

Dispatch relies on a combination of phone calls, text messages, and a shared spreadsheet maintained by each branch independently. There is no single system of record showing technician location, job status, or daily capacity across the organization.

#### Evidence Observed

- Four of six branches maintain separate, non-synchronized scheduling spreadsheets.
- Dispatchers report an average of 45–60 minutes per day reconciling schedule conflicts by phone.
- No real-time visibility into technician arrival, in-progress, or completion status.
- Job reassignment during the day (e.g., emergency calls) requires manual outreach to multiple staff.

#### Risks If Unaddressed

- Missed or double-booked appointments due to lack of cross-branch visibility.
- Inconsistent customer communication about arrival windows.
- Inability to reliably measure technician utilization or route efficiency.

## Recommendations

- Consolidate scheduling into a single, shared system of record accessible across all branches.
- Implement automated status updates (en route / arrived / complete) tied to technician mobile devices.
- Establish a standard reassignment workflow for same-day emergency jobs.

### 3.2 Inventory & Equipment Management — Score: 2 / 5 (Developing)

Parts and equipment inventory is tracked manually via paper check-out logs at four locations and informally (verbal/no tracking) at two. There is no organization-wide visibility into stock levels, equipment location, or usage history.

#### Evidence Observed

- Two branches reported inventory “shrinkage” they were unable to quantify precisely.
- Average of 3.5 stockout incidents per branch per month requiring emergency parts runs.
- No shared visibility into which branch holds surplus stock of a given part.
- Equipment maintenance history is tracked inconsistently, complicating warranty claims.

#### Risks If Unaddressed

- Recurring emergency purchasing at above-standard cost.
- Undetected equipment loss, or misuse, missed warranty recovery due to incomplete maintenance records.

#### Recommendations

- Pilot barcode or RFID-based check-in/check-out tracking at one location before organization-wide rollout.
- Establish a shared, real-time stock-level view across branches to enable inter-branch transfers before emergency purchase.
- Standardized equipment maintenance logging tied to each asset.

### 3.3 Compliance & Reporting — Score: 3 / 5 (Defined)

Required compliance documentation (safety checklists, inspection records, certifications) is consistently completed, reflecting a genuine strength relative to the other dimensions. However, format, storage location, and retention practice vary by branch, and reporting to leadership is compiled manually.

#### Evidence Observed

- All six branches maintain required safety and inspection documentation.
- Documentation format differs by branch — three use paper forms, three use varying digital templates.
- Monthly compliance reporting to leadership is manually compiled from branch submissions, taking an estimated 6–8 hours per cycle.
- No centralized, searchable archive of historical compliance records.

#### Risks If Unaddressed

- Difficulty producing records quickly in the event of an audit or incident investigation.
- Manual compilation introduces transcription error into leadership reporting.
- Inconsistent formats increase onboarding time for new compliance staff.

#### Recommendations

- Standardize a single digital compliance documentation template across all branches.
- Automate monthly compliance report generation from submitted records.



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- Establish a centralized, searchable retention archive with defined retention periods.

### 3.4 Administrative & Data Entry Workflows — Score: 1 / 5 (Initial)

The same job, customer, and billing information is manually re-entered by administrative staff into three separate, disconnected systems (scheduling spreadsheet, invoicing software, and a legacy customer database), with no integration between them.

#### Evidence Observed

- Administrative staff report re-entering the same core job data an average of three times per completed job.
- No integration exists between the scheduling spreadsheet, invoicing system, and customer records.
- Invoice generation is delayed an average of 4 business days after job completion due to manual data transfer.
- Data entry errors have caused billing discrepancies requiring correction in an estimated 8% of invoices.

#### Risks If Unaddressed

- Direct labor cost of redundant manual entry.
- Delayed billing directly delays cash collection.
- Billing errors create customer friction and rework.

#### Recommendations

- Integrate scheduling, invoicing, and customer-record systems so job data is entered once and flows automatically.
- Automate invoice generation to trigger on job-completion status rather than manual initiation.
- Introduce validation checks at data entry to catch discrepancies before invoicing.

### 3.5 Cross-Department Communication — Score: 2 / 5 (Developing)

Dispatch, warehouse, and billing functions operate with limited real-time visibility into one another's status, relying primarily on phone calls and informal check-ins to coordinate.

#### Evidence Observed

- Warehouse staff are frequently unaware a job requiring specific parts has been scheduled until the technician arrives to pick up materials.
- Billing staff report regularly contacting dispatch directly to confirm job-completion status before invoicing.
- No shared dashboard or status view exists across departments.

#### Risks If Unaddressed

- Delays compound across departments rather than being caught early.
- Rework and duplicated status-checking consume staff time without adding value.

#### Recommendations

- Establish a shared, lightweight status dashboard visible to dispatch, warehouse, and billing.
- Define standard status triggers (e.g., job scheduled, parts required, job complete) that automatically notify relevant departments.

### 3.6 Technology & Systems Infrastructure — Score: 3 / 5 (Defined)

Meridian has functional, individually adequate systems (a scheduling spreadsheet, invoicing software, and a customer database) but they were adopted independently over time and were never integrated, reflecting typical growth-stage technical debt rather than an absence of tooling.

### Evidence Observed

- Invoicing software and customer databases are both modern, cloud-based platforms.
- No integration layer exists connecting the three core systems in use.
- IT support is handled by a single part-time contractor without a documented systems roadmap.

### Risks If Unaddressed

- Continued manual bridging between systems as the organization grows increases error rate and administrative cost proportionally.
- Absence of a systems roadmap risks further ad hoc tool adoption that compounds fragmentation.

### Recommendations

- Establish an integration layer connecting scheduling, invoicing, and customer-record systems.
- Develop a lightweight systems roadmap prioritizing integration over new tool adoption

## 4. Opportunity & Gap Matrix

The following matrix consolidates every recommendation from Section 3 into a single prioritized view, ranked by impact relative to implementation effort. This view is intended to support sequencing decisions independent of the phased roadmap in Section 6.

| Opportunity                                                        | Function                       | Impact | Effort | Priority |
|--------------------------------------------------------------------|--------------------------------|--------|--------|----------|
| Centralize dispatch scheduling into a single system of record      | Scheduling & Dispatch          | High   | Medium | 1        |
| Automate technician arrival/completion status updates              | Scheduling & Dispatch          | High   | Low    | 2        |
| Deploy barcode/RFID tracking for equipment and parts inventory     | Inventory & Equipment          | Medium | Medium | 3        |
| Standardize compliance documentation templates across locations    | Compliance & Reporting         | Medium | Low    | 4        |
| Automate recurring regulatory reporting submissions                | Compliance & Reporting         | High   | Medium | 5        |
| Reduce manual data entry via system-to-system integration          | Administrative & Data Entry    | High   | High   | 6        |
| Establish shared cross-department status dashboard                 | Cross-Department Communication | Medium | Medium | 7        |
| Consolidate legacy spreadsheets into a unified operations platform | Technology & Systems           | High   | High   | 8        |

## 5. 90-Day Quick Wins

The following five initiatives were selected because they combine low-to-moderate implementation effort with immediate, measurable operational impact, and can be completed within a 90-day window without dependency on larger infrastructure changes.

| Initiative                                                                | Owner               | Timeline | Effort | Impact |
|---------------------------------------------------------------------------|---------------------|----------|--------|--------|
| Automate technician arrival/completion status updates                     | Operations Manager  | 21 days  | Low    | High   |
| Standardize compliance documentation templates across locations           | Compliance Lead     | 30 days  | Low    | Medium |
| Establish shared cross-department status dashboard (using existing tools) | IT / Operations     | 30 days  | Low    | Medium |
| Centralize dispatch scheduling into a single system of record             | Dispatch Supervisor | 60 days  | Medium | High   |
| Pilot barcode tracking at one location for equipment check-out            | Warehouse Lead      | 60 days  | Medium | Medium |

## 6. Phased Implementation Roadmap

Beyond the 90-day quick wins, the following initiatives are organized into short-, medium-, and long-term phases based on scope, dependency, and organizational readiness.

### Short-Term (0–3 Months)

| Initiative                                                    | Dependencies                         | Duration | Impact |
|---------------------------------------------------------------|--------------------------------------|----------|--------|
| Centralize dispatch scheduling into a single system of record | Quick-win completion, staff training | 6 weeks  | High   |
| Standardize compliance documentation template across branches | Compliance lead sign-off             | 4 weeks  | Medium |

### Medium-Term (3–6 Months)

| Initiative                                               | Dependencies                        | Duration | Impact |
|----------------------------------------------------------|-------------------------------------|----------|--------|
| Deploy barcode/RFID inventory tracking organization-wide | Successful single-location pilot    | 10 weeks | Medium |
| Automate monthly compliance reporting                    | Standardized documentation template | 6 weeks  | High   |
| Establish shared cross-department status dashboard       | Scheduling system in place          | 8 weeks  | Medium |

## Long-Term (6–12 Months)

| Initiative                                                         | Dependencies                           | Duration | Impact |
|--------------------------------------------------------------------|----------------------------------------|----------|--------|
| Integrate scheduling, invoicing, and customer-record systems       | IT roadmap approval, budget allocation | 16 weeks | High   |
| Automate invoice generation on job-completion status               | Systems integration complete           | 6 weeks  | High   |
| Establish organization-wide systems integration roadmap governance | Leadership sponsorship                 | Ongoing  | High   |

## 7. ROI Projection

The following projection estimates the annual value of implementing the recommendations in this assessment, expressed across conservative, expected, and optimistic scenarios. Figures are illustrative, based on the fictional operational assumptions used throughout this sample document, and are not derived from a real engagement.

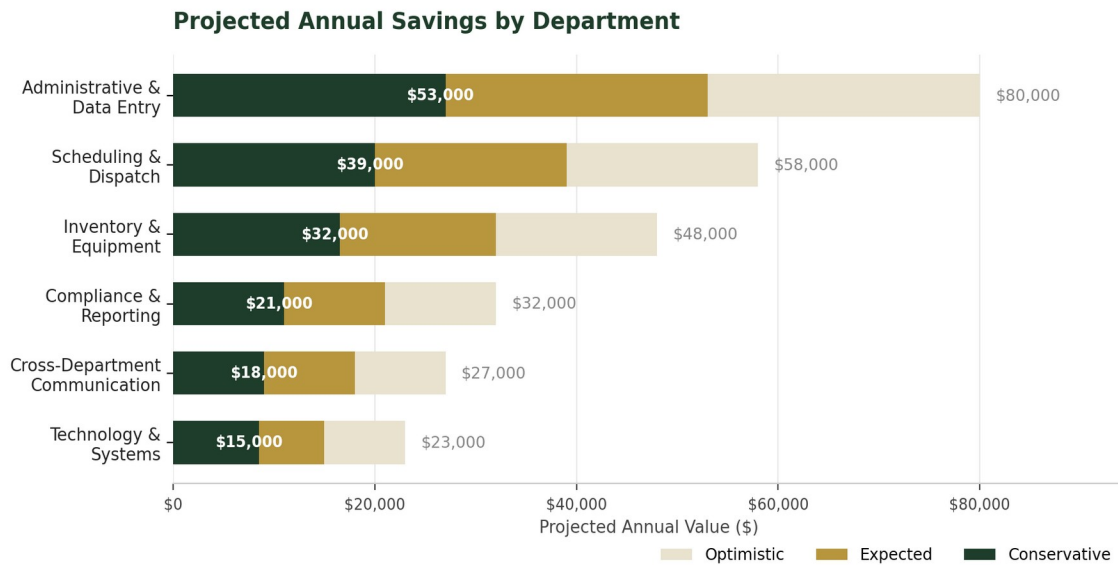
### Methodology

Projected value is calculated across three drivers: (1) administrative labor hours reclaimed through reduced redundant data entry and manual reconciliation, valued at a fully loaded hourly rate; (2) reduction in billing and documentation errors, valued at estimated average cost per correction; and (3) reduction in equipment loss and emergency purchasing driven by improved inventory visibility. Each driver is modeled at three adoption/execution levels to produce conservative, expected, and optimistic scenarios.

| Value Driver                                      | Conservative    | Expected         | Optimistic       |
|---------------------------------------------------|-----------------|------------------|------------------|
| Administrative labor hours reclaimed / year       | 1,190 hrs       | 2,310 hrs        | 3,500 hrs        |
| Value of reclaimed labor (@ \$32/hr fully loaded) | \$38,000        | \$74,000         | \$112,000        |
| Reduction in billing/documentation errors         | 15%             | 30%              | 45%              |
| Estimated annual value of error reduction         | \$30,000        | \$58,000         | \$90,000         |
| Reduced equipment loss/misplacement               | \$24,000        | \$46,000         | \$66,000         |
| <b>Total estimated annual value</b>               | <b>\$92,000</b> | <b>\$178,000</b> | <b>\$268,000</b> |

## 7.1 Departmental Savings Breakdown

The org-wide totals above are the sum of savings attributable to each of the six operational dimensions assessed in Section 3. The breakdown below ties each department's projected value back to its specific findings, so the numbers can be reviewed against the underlying evidence rather than taken as an aggregate figure alone.



### Administrative & Data Entry

The largest single driver, reflects the finding that job data is re-entered an average of three times per job with no system integration (Section 3.4). Value is driven primarily by reclaimed administrative labor hours and reduced billing-correction volume.

| Conservative | Expected | Optimistic |
|--------------|----------|------------|
| \$27,000     | \$53,000 | \$80,000   |

### Scheduling & Dispatch

Reflects reduced daily schedule-reconciliation time and fewer missed or double-booked appointments once a single system of record replaces phone- and spreadsheet-based coordination (Section 3.1).

| Conservative | Expected | Optimistic |
|--------------|----------|------------|
| \$20,000     | \$39,000 | \$58,000   |

### Inventory & Equipment

Reflects reduced emergency parts purchasing and recovered equipment-loss value once stock levels and equipment location are visible across branches rather than tracked manually or informally (Section 3.2).

| Conservative | Expected | Optimistic |
|--------------|----------|------------|
| \$16,500     | \$32,000 | \$48,000   |

### Compliance & Reporting

Reflects time reclaimed from manual monthly report compilation (currently 6–8 hours per cycle) once documentation is standardized and reporting is automated from submitted records (Section 3.3).

| Conservative | Expected | Optimistic |
|--------------|----------|------------|
| \$11,000     | \$21,000 | \$32,000   |

### Cross-Department Communication

Reflects reduced duplicated status-checking between dispatch, warehouse, and billing once a shared status view removes the need for staff to manually confirm job status by phone (Section 3.5).

| Conservative | Expected | Optimistic |
|--------------|----------|------------|
| \$9,000      | \$18,000 | \$27,000   |

### Technology & Systems Infrastructure

The smallest direct driver, since this dimension is primarily enabling rather than a standalone source of savings — value here reflects reduced IT/administrative overhead from maintaining fewer disconnected point solutions once systems are integrated (Section 3.6).

| Conservative | Expected | Optimistic |
|--------------|----------|------------|
| \$8,500      | \$15,000 | \$23,000   |

### Payback Period

Peak Custom engagements are typically scoped in the \$5,000–\$30,000 range depending on assessment depth and organization size. Against the expected case annual value above, this corresponds to an estimated payback period of well under two months for a fully-scoped engagement — with full-scenario ROI continuing to compound in subsequent years as integrated systems reduce ongoing operating cost.



## 8. Appendix: About This Sample

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This document was produced by Peak Automation as an illustrative example of the format, depth, and professionalism of a Peak Custom Impact Assessment deliverable. Meridian Service Group, its branches, staff, and all figures referenced throughout are fictional and provided for demonstration purposes only.

The operational functions examined in this sample — scheduling and dispatch, inventory and equipment management, compliance and reporting, administrative data entry, cross-department communication, and systems infrastructure — are common to a wide range of operationally complex businesses and are not specific to any single industry. A Peak Custom engagement is scoped individually to the operations of each client organization.

Peak Custom is a comprehensive, cross-departmental automation engagement, structurally separate from Peak Generate and Peak Capture. Where Generate and Capture address lead generation and inbound-inquiry handling, Peak Custom addresses how a business runs internally — and most commonly follows Generate and/or Capture have already been implemented.



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