

FICTIONAL SAMPLE CLIENT DELIVERABLE

AI Workflow Readiness Report

Westmoor Precision Engineering Ltd — enquiry-to-quotation workflow

Prepared for	Westmoor Precision Engineering Ltd (fictional)
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Report date	19 July 2026
Status	Final sample
Evidence cut-off	12 July 2026

CORE PROMISE

Ready with prerequisites for a bounded, human-supervised intake integration. Not ready for autonomous quotation generation.

Enterprise-grade AI integration thinking for smaller organisations.

IMPORTANT

Westmoor Precision Engineering Ltd is fictional. This document demonstrates the form and depth of a Codance client deliverable; it is not presented as commissioned work or a verified account of a real organisation.

1. Executive decision

Business objective

Westmoor wants to acknowledge and organise every request for quotation promptly, identify incomplete enquiries earlier, reduce estimator administration and shorten quotation lead time without delegating engineering or commercial commitments to AI.

Principal finding

The enquiry-to-quotation workflow is ready with prerequisites for a limited AI-assisted intake and estimator-preparation integration. The strongest first opportunity is not automatic quotation generation. It is the controlled capture, classification and preparation of enquiry evidence for review by a named estimator.

The present process relies on Outlook, Excel, a shared drive, JobFlow MRP and the knowledge of two experienced people. Those sources do not yet provide a consistent operational record of ownership, completeness, clarification, approval and status. Historic estimate and actual-cost data are also insufficiently consistent to support dependable automated pricing.

Recommended next action

Define one authorised enquiry route and structured working record, measure the present workflow for four weeks, confirm JobFlow integration options and commission a bounded Integration Blueprint for AI-assisted intake and estimator preparation.

Readiness conclusion	Finding	Confidence
Ready with prerequisites	Proceed to controlled design after the essential preparation in section 8.	Moderate to high

Reason for confidence: the workflow boundary, operational problems, principal participants, important decisions and a safer first opportunity are clear. Confidence is limited by the absence of direct JobFlow inspection, verified interface information and measured baseline performance.

2. Scope and evidence

Boundary element	Agreed position
Workflow assessed	Receipt of a request for quotation through approved recording, technical and commercial assessment, approval and issue.
Starting event	An authorised customer enquiry is received by email, website form or telephone.
Completion event	An approved quotation is sent to the customer and its status and assumptions are recorded.
Included function	Sales administration, estimating and technical approval for one enquiry-to-quotation workflow.
Excluded activity	Production planning, order fulfilment, autonomous pricing, supplier ordering and implementation design.

Evidence basis

Evidence	Status	Use or limitation
Completed workflow questionnaire and clarification discussion	Reviewed	Primary account of the actual workflow, ownership, problems and desired outcome.
Anonymised enquiry and quotation examples	Representative sample	Illustrated complete, incomplete, conflicting and cost-variance cases.
Excel enquiry log, quotation template and example folder	Reviewed	Showed current status tracking, handover and record structure.
JobFlow screenshots and reported usage	Indirect evidence	System behaviour and interface capability were not independently verified.
Supplier proposal for an automated quotation prototype	Reviewed	Used to test scope, assumptions, authority and missing controls.

Known limitations and assumptions

- Codance did not access live systems or verify historic quotation and job-cost accuracy.
- Drawing and CAD extraction capability was not technically tested.
- JobFlow API, import, licensing and support arrangements remain unconfirmed.
- The reported weekly volume, effort and lead-time figures have not yet been measured against a formal baseline.
- This assessment is not legal, privacy, cybersecurity or engineering-safety certification.

3. Current workflow

Westmoor receives approximately 25–40 enquiries each week. Around half require meaningful technical assessment. Enquiries arrive through several routes and are manually reconciled across a shared inbox, an Excel log, customer folders, JobFlow and personal knowledge. The workflow succeeds, but visibility and consistency depend on experienced staff noticing what is missing and keeping parallel records aligned.

Step	Activity and owner	Information or system	Output, handover or problem
1	Enquiry arrives; sales administrator or recipient	Shared inbox, direct email, website or telephone	Direct enquiries may not enter the common process promptly.
2	Enquiry is forwarded or assigned	Outlook and Excel enquiry log	Ownership and urgency depend on manual judgement.
3	Estimator checks request and attachments	Email, PDFs, CAD, spreadsheets and specifications	There is no consistent completeness checklist.
4	Missing or conflicting information is clarified	Email and personal notes	Customers may wait before gaps are identified; latest clarification is not always visible.
5	Similar work is sought	JobFlow, shared drive and personal memory	Historic evidence is difficult to locate and compare consistently.
6	Manufacturing, material, subcontract and labour needs are estimated	Experience, prior jobs, supplier email and production knowledge	High-value judgement is concentrated in two experienced people.
7	Quotation is prepared	Excel quotation template	Assumptions and pricing rationale are not always recorded consistently.
8	Technical director reviews qualifying work	£5,000 threshold plus judgement of unusual risk	The formal threshold is clear; risk-based escalation is informal.
9	Approved quotation is issued and recorded	PDF, email, JobFlow, Excel and shared drive	Completion and current status must be updated in several places.

Informal routes, delay and rework

- Established customers sometimes bypass the shared inbox and contact an individual directly.
- The estimator spends material time organising attachments, searching records and chasing information rather than estimating.
- Quantity, drawing-revision and specification conflicts may be discovered late.
- Supplier responses can pause the entire quotation while status remains difficult for others to see.
- Estimated hours and assumptions are not consistently compared with actual job outcomes, limiting future learning.

CURRENT-STATE FINDING

The principal constraint is not simply quotation calculation. It is the absence of a consistent intake and control process before estimating begins.

4. Information and operational truth

Information	Origin	Current authority	Readiness finding
Original enquiry and attachments	Customer	Original email and files	Strong evidence if preserved immutably and linked to one enquiry ID.
Outstanding-enquiry status	Sales and estimating activity	Excel log in practice	Incomplete: ownership, missing information and latest clarification are not reliably visible.
Historic quotations	Prior estimating work	Shared drive and JobFlow	Usable for retrieval, but structure and rationale are inconsistent.
Historic actual costs	Completed jobs	JobFlow	Potentially valuable but accuracy and comparability are unverified.
Drawing interpretation and manufacturing assumptions	Estimator and production knowledge	Personal judgement and notes	Important knowledge is weakly structured and must not be treated as automatic truth.
Approved commercial commitment	Human-approved quotation	Issued quotation and JobFlow record	Must remain the authoritative commercial truth.

Source-of-truth finding

Westmoor currently has several competing operational truths. An AI integration should not create another. The original customer material must remain immutable evidence; a structured working enquiry record should hold candidate and verified facts, ownership, status and clarification; and only human-approved information should enter the formal quotation or JobFlow commercial record.

5. Decisions, exceptions and authority

Decision or exception	Current owner	Nature	Recommended treatment
Is required information present?	Estimator	Mixed checklist and interpretation	Deterministic checks plus AI assistance; estimator confirms.
Do email, drawing and quantity documents conflict?	Estimator	Document comparison and judgement	AI may flag apparent conflict; human resolves it.
Is the work suitable and manufacturable?	Estimator or technical director	Engineering judgement	Human-controlled.
What manufacturing method and labour are required?	Estimator	Experience and technical judgement	Human-controlled initially.
What margin and delivery commitment are acceptable?	Estimator or director	Commercial judgement	Human-controlled.
Does the quotation require approval?	Technical director	£5,000 rule plus unusual-risk judgement	Software applies threshold; people assess unusual risk.

AUTHORITY RULE

**AI-generated content remains extracted, proposed or unverified until a named person approves it.
AI must not set price, promise delivery, approve technical risk or send a final quotation.**

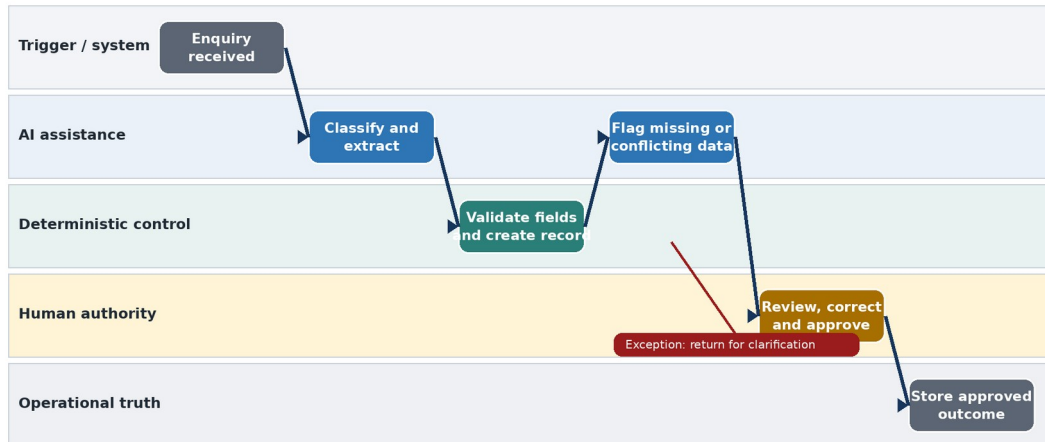
6. Opportunity assessment

Activity	Best mechanism	Potential value	Principal concern
Capture and identify every authorised enquiry	Deterministic workflow	High	Direct and telephone routes must enter the same process.
Classify attachments and extract candidate facts	AI assistance	High	Extraction must remain visibly unverified.
Check mandatory fields and approval thresholds	Deterministic rules	High	Rules and required fields must first be agreed.
Identify apparent gaps and conflicts	AI plus rules	High	False confidence must trigger review, not silent completion.
Draft acknowledgement or clarification	AI-assisted drafting	Medium to high	External communication requires human approval.
Retrieve potentially similar historic jobs	AI-assisted retrieval	Medium	Similarity must include supporting evidence and revision awareness.
Set method, labour, price and delivery	Human judgement	Potentially high later	Current evidence is not ready for dependable automation.

Recommended initial opportunity

Implement AI-assisted RFQ intake and estimator preparation. The bounded future workflow should capture each enquiry, preserve its original evidence, classify documents, extract candidate facts, apply agreed completeness checks, flag apparent conflicts, prepare a draft acknowledgement or clarification request, retrieve candidate historic jobs and assemble an estimator review pack for a named human owner.

Example future-state workflow — bounded AI assistance



Why this opportunity is suitable

It addresses a clear administrative bottleneck; produces outputs that can be reviewed before use; makes errors visible and reversible; preserves engineering and commercial authority; and creates the structured operational data needed before higher-consequence assistance is considered.

What should not be attempted first

Automatic quotation generation, autonomous pricing, unapproved delivery commitments and automated rejection should remain outside the first implementation. They depend on reliable historic costs, explicit decision rules, dependable drawing interpretation and understood treatment of unusual risk that the available evidence does not demonstrate.

7. Readiness conclusion

Area	Rating	Finding
Workflow clarity	Adequate	The overall path and principal roles are understood, but intake and exception handling are inconsistent.
Information readiness	Weak	Original evidence exists, but status, assumptions and historic rationale are fragmented.
Ownership and authority	Adequate	Process ownership and important approvers are identifiable; several operating rules remain informal.
Technical readiness	Limited	The proposed boundary is technically plausible, but JobFlow interfaces and extraction performance are unverified.
Risk and control readiness	Adequate	Human authority can be preserved if approvals, audit and fallback are designed explicitly.
Measurement readiness	Weak	Reported pain is credible, but baseline time, error, rework and correction burden are not measured consistently.

Overall readiness

Westmoor is sufficiently ready to design and test a limited, human-supervised intake integration. It is not ready for autonomous quotation generation. Proceeding safely depends on first defining the workflow's operational record, evidence treatment, authority, baseline and interface assumptions.

8. Essential prerequisites

1. Define one authorised route by which every new enquiry enters the controlled workflow.
2. Create a unique enquiry identifier and structured working record for ownership, status, missing information, conflicts and clarification.
3. Agree the minimum information required before estimating begins and document the normal and exception paths.
4. Define which system owns working status and how approved information relates to JobFlow.
5. Document human approval points and the actions AI may never execute without approval.
6. Prepare a representative test set covering complete, incomplete, conflicting, repeat and unusual enquiries.
7. Confirm JobFlow interface, licensing, permission, audit and support options.
8. Measure volume, active effort, elapsed time, rework and response performance for at least four weeks.

9. Principal risks and controls

Risk	Likelihood	Impact	Recommended control
Extracted information is mistaken for approved fact	Medium	High	Visible provenance and status labels; mandatory human verification.
An enquiry bypasses the controlled route	High	Medium	Authorised-channel policy and simple capture route for direct or telephone enquiries.
Conflicting quantities or revisions are missed	Medium	High	Deterministic comparisons where possible; mandatory escalation of conflict.
Integration writes an incorrect record or becomes unavailable	Medium	High	Shadow mode, constrained permissions, validation, audit, rollback and a manual continuation path.
Administrative work moves rather than reduces	Medium	Medium	Measure correction burden and estimator preparation time during the pilot.

10. Recommended route

Stage	Purpose	Exit condition
Preparation	Define record, fields, status, authority, test set, baseline and JobFlow options.	Prerequisites are documented and owned.
Shadow-mode evaluation	Process historic and selected live enquiries without changing production records or sending messages.	Classification, extraction, gaps, conflicts and correction burden are measured.
Human-approved pilot	Create draft records, summaries and communications for named-person approval.	No unauthorised commitment; value and workload meet agreed measures.
Controlled integration	Write approved data and status to operational systems with audit and fallback.	Acceptance criteria, permissions, monitoring and recovery are proven.

Suggested first-phase measures

- Every authorised enquiry is captured and linked to its original evidence.
- No customer communication or commercial commitment is issued without required approval.
- Required-field conflicts are always escalated rather than silently resolved.
- Classification, extraction accuracy and human correction burden are measured on the agreed test set.
- Estimator administrative preparation time and enquiry acknowledgement time improve against the baseline.
- Every pilot enquiry has an auditable status history and a safe manual continuation path.

Conclusion

Westmoor should not commission the proposed automatic quotation prototype in its current form. It should proceed with a smaller, controlled design for AI-assisted intake and estimator preparation after completing the essential prerequisites. This route addresses immediate operational friction, protects human engineering and commercial authority, and creates the evidence needed to judge whether deeper estimating assistance would later be safe and worthwhile.