

REPRESENTATIVE WORKED EXAMPLE

The £12,000 AI prototype that should not be built—yet

How a workflow-first assessment found a safer, more valuable starting point for a small engineering company.

Fictional client	Westmoor Precision Engineering Ltd
Business	Low-volume precision fabrication and machining
Employees	14
Workflow	Customer enquiry to approved quotation
Engagement illustrated	AI Workflow Readiness Assessment

CORE PROMISE

The client asked whether AI should prepare quotations. The assessment found that structured intake—not autonomous pricing—was the right first intervention.

Enterprise-grade AI integration thinking for smaller organisations.

IMPORTANT

Westmoor Precision Engineering Ltd is fictional. This example is representative and demonstrates Codance's method; it is not presented as commissioned client work.

1. The initial ambition

Westmoor receives approximately 25–40 requests for quotation each week. Enquiries arrive by shared inbox, direct email, website and occasionally telephone. A typical request may include drawings, CAD files, quantity spreadsheets, material specifications and incomplete or contradictory instructions.

A local automation supplier proposed a discovery phase and prototype costing approximately £12,000. The concept would monitor email, extract information and create quotation drafts automatically.

The proposal sounded efficient—but it did not clearly explain:

- how drawing information and revisions would be validated;
- how conflicting quantities or specifications would be handled;
- how historic jobs would be selected and compared;
- how JobFlow MRP would interact with the enquiry record;
- which commercial and engineering decisions required human approval;
- what would happen when the AI was uncertain or wrong.

2. What the workflow assessment found

The main operational constraint was not simply the time needed to calculate a quotation. It was the absence of a consistent intake and control process before estimation began.

Historic estimates and actual costs were also not yet consistent enough to support dependable automated pricing. The process depended heavily on two experienced people, so administration consumed scarce technical attention and created key-person dependence.

Present condition	Operational consequence
Enquiries enter through several routes	Some remain unread, unassigned or outside the shared process.
Outlook, Excel, shared drive and JobFlow hold different parts of the truth	Nobody can reliably see ownership, status, missing information or the latest clarification.
Drawing completeness is checked from experience	Important notes and conflicts may be found late.

READINESS CONCLUSION

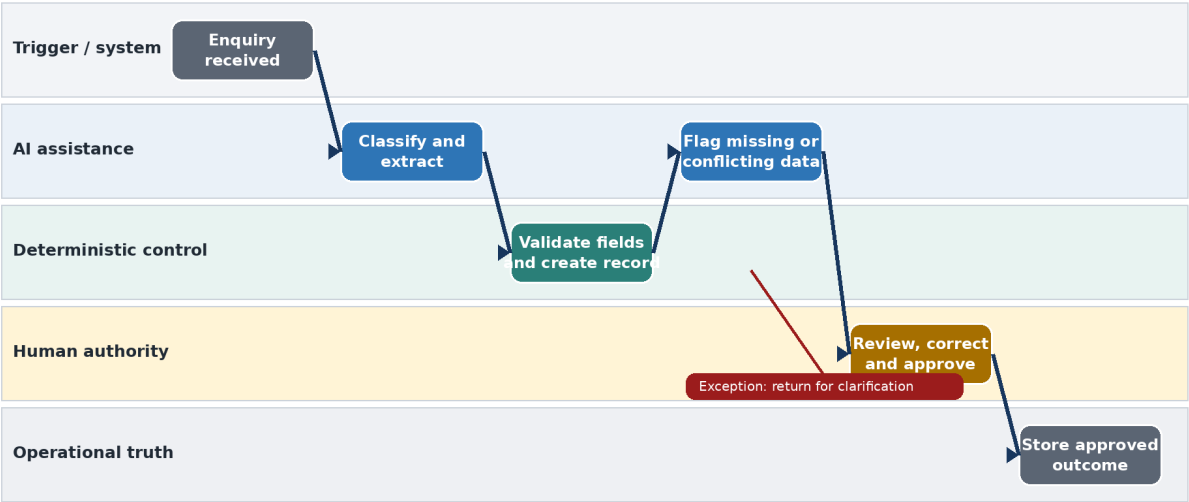
Ready with prerequisites for a limited, human-supervised intake integration. Not ready for autonomous quotation generation.

3. The correct first intervention

Codance would recommend AI-assisted enquiry intake and estimator preparation. The proposed first stage would:

1. capture every authorised enquiry and preserve the original email and attachments;
2. classify documents and extract candidate facts, clearly marked as unverified;
3. apply deterministic completeness checks and identify apparent conflicts;
4. draft an acknowledgement or clarification request for human approval;
5. retrieve potentially similar historic jobs with supporting evidence;
6. assemble an estimator review pack and assign it to a named human owner;
7. record clarification, approval, status and final completion events.

Example future-state workflow — bounded AI assistance



4. Responsibility and authority

AI may assist	Deterministic software should	People must retain
Classify documents; extract candidate quantities and references; detect apparent gaps; draft communications; retrieve similar jobs; summarise evidence.	Create controlled records; validate required fields; apply approval thresholds; enforce permissions; log actions; prevent duplicate processing.	Confirm drawing interpretation; select manufacturing method; estimate labour; accept technical risk; set margin and delivery; approve and send quotations.

AUTHORITY RULE

AI-generated content remains proposed or unverified until a named person approves it. It may not create a commercial commitment merely because its output appears plausible.

5. What the £95 Assessment delivers

The Readiness Assessment has already produced a commercially meaningful decision:

- do not commission automatic quotation generation in its current form;
- proceed with a bounded intake and estimator-preparation opportunity;
- resolve the source-of-truth, process and access prerequisites;

- require shadow-mode testing followed by a human-approved pilot;
- preserve commercial and engineering authority;
- ask the supplier to respond to clearer acceptance and failure requirements.

Westmoor could act on this decision without purchasing anything further from Codance. Avoiding the wrong prototype, or reshaping it before purchase, may be worth substantially more than the assessment fee.

6. What the £295 Blueprint adds

Assessment	Blueprint
Determines whether, where and why to proceed.	Defines exactly how the selected integration should operate.
Identifies readiness, risks, prerequisites and the best first opportunity.	Defines future workflow, information, responsibilities, approval, systems, failure, stages and acceptance criteria.
Ends with an independent next-action decision.	Creates a basis for internal approval, supplier quotation and controlled prototype planning.

Illustrative pilot acceptance conditions

Actual thresholds would be agreed from Westmoor's evidence and risk. A supplier should nevertheless demonstrate:

- no loss or alteration of original customer evidence;
- reliable classification and extraction on a representative test set;
- mandatory escalation of required-field conflicts;
- no unauthorised customer communication or commercial commitment;
- an acceptable human correction burden;
- complete audit history for every pilot enquiry;
- safe manual continuation when the AI service is unavailable.

7. The Codance principle

Westmoor's experience illustrates why AI integration resembles earlier MRP and operational-system integration: organisations benefit when technology strengthens a workflow they understand. When the workflow, information and authority remain ambiguous, technology often accelerates the ambiguity and makes it more expensive.

THE RESULT

A smaller, safer first integration; clearer supplier expectations; protected human authority; and a path that creates useful operational data before attempting high-consequence automation.

Find where AI can genuinely improve your business before you pay to build it.

CONTINUE READING

A complete fictional Westmoor AI Workflow Readiness Assessment accompanies this summary. It shows the evidence, analysis, readiness ratings, prerequisites, risks and recommended route a client would actually receive.