SBS Ltd
Strategy • Systems • Success

CLIENT SERVICE OVERVIEW



AI Workflow Review

Improve the work first. Automate only where the business case is real.

FIXED PROFESSIONAL FEE
£1,500

TYPICAL DELIVERY
7–10 working days

BEST FOR
SMEs seeking practical productivity gains from workflow redesign, automation and AI

PRIMARY OUTCOME
A prioritised opportunity matrix, Top Three designs, value case and 30/60/90-day roadmap

The client question

> *Where in our business can AI and automation create the greatest practical value, what should we prioritise, and how should we implement it safely?*



What this review delivers

Diagnostic review of selected high-value workflows
Understand current ways of working, pain points and opportunities across agreed areas.

Management briefing and stakeholder input
Initial management briefing plus up to approximately three stakeholder interviews.

Workflow mapping
Map current processes at an appropriate diagnostic level to identify bottlenecks, handoffs and automation potential.

AI Workflow Opportunity Matrix
Assess opportunitises across simplify, automate, AI-enable and agentic options.

Do Not Automate / Not Yet findings
Explicitly identify areas that should not be automated, or where the timing or evidence is insufficient.

Indicative value / ROI
Estimate potential benefits across time, capacity, cost, quality or turnaround where evidence permits.

Top Three recommended opportunity designs
Detailed designs with human controls, dependencies and success factors.

30/60/90-day implementation roadmap
A pragmatic phased plan to move from design to delivery.

Management report and read-out
Concise written report and a 60-minute management read-out.

How SBS works

1. **Simplify the work**
   Understand and streamline current processes to remove unnecessary steps.
2. **Identify automation opportunities**
   Find where manual work can be simplified or automated with proven technology.
3. **Assess AI-enabled options**
   Evaluate where AI and agentic approaches can add additional value.
4. **Prioritise the business case and roadmap**
   Build a prioritised plan with clear value case and 30/60/90-day next steps.

Suitable when

- ✓ Administration workload is rising as the business grows.
- ✓ Staff repeateely re-key, search, copy, classify or summarise information.
- ✓ Management suspects AI could help but lacks a reliable priority order.
- ✓ Work is spread across email, spreadsheets, shared drives and disconnected systems.
- ✓ You want a controlled business case before commissioning technology implementation.

Standard exclusions

- × No full enterprise AI strategy or organisational AI-readiness assessment.
- × No software configuration, integrations, development, licences or implementation.
- × No exhaustive process mapping across the whole organisation.
- × No guaranteed cash savings or productivity outcomes.
- × No automation of high-risk work where the evidence does not support it.