> **SAMPLE: a fictional business. Not a client of Adwaizer.**

AI Audit report: Larchmere Home Comfort Ltd. (sample)

Prepared by: Adwaizer AI Consulting Inc. · **Engagement:** Adwaizer AI Audit (2 weeks, fixed scope and fixed price) · **Report version:** sample, October 2026

What this page is. This is the report a client keeps at the end of the Adwaizer AI Audit. Larchmere Home Comfort is invented to show the format and depth; the business, its people and its numbers do not exist. In a real audit, every figure comes from the client's own records or interviews, and every estimate says what it rests on.

How to read the numbers. Nothing in this report was measured. Figures marked *(owner's estimate)* are what the fictional owner told us in interviews. Figures marked *(estimate)* are ours and name their assumption next to them. Costs are in Canadian dollars (CAD), before tax.

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1. Executive summary

Larchmere Home Comfort is a residential heating, cooling and plumbing service company in Ottawa with 24 people. Its office team of four spends much of the week on work that follows a fixed pattern: answering the same customer questions, typing technician notes into invoices, chasing maintenance-plan renewals and filling in rebate paperwork. The owner's concern is that the office cannot keep up in the two peak seasons (first cold snap, first heat wave) without hiring.

We mapped 10 workflows and scored 6 AI opportunities. Our recommendation:

1. **Start with technician job notes to invoice and customer summary** (opportunity O2). It is low risk, uses tools Larchmere already has, and gives the office back an estimated 6 to 8 hours a week.
2. **Next, a maintenance-plan renewal assistant** (O3), which protects recurring revenue the owner believes is leaking today.
3. **Then an after-hours intake assistant** (O1), once the job notes and renewal workflows have shown the team that AI drafts can be trusted and checked.

We advise **against** automated quoting and AI-written rebate submissions for now (section 5). The 90-day plan in section 6 delivers the first opportunity in weeks 1 to 6 and starts the second in weeks 7 to 12. Estimated cost of the three recommended opportunities: CAD 9,000 to 16,000 one-time plus CAD 1,500 to 4,200 a year to run (section 7), against an estimated time saving of 12 to 18 office hours a week in peak season once all three run.

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2. The business (fictional)

Item	Detail
Name	Larchmere Home Comfort Ltd. (invented)
Location	Ottawa, Ontario; serves the city and nearby towns
Sector	Residential HVAC (furnaces, heat pumps, air conditioning) and plumbing: repairs, installs, maintenance plans

Item	Detail
People	24: owner-operator, office manager, 2 dispatchers / customer service, 1 bookkeeper, 2 estimators, 14 licensed technicians, 3 apprentices
Customers	About 3,000 active households *(owner's estimate)*; about 900 on an annual maintenance plan *(owner's estimate)*
Revenue	Not disclosed for this sample
Current tools	A field-service app for scheduling, dispatch and invoicing; QuickBooks Online; Google Workspace (Gmail, Calendar, Drive, Sheets); a shared spreadsheet for maintenance plans; a phone system with voice mailbox; paper or phone-photo forms for rebate paperwork
Who we spoke with	Owner, office manager, one dispatcher, bookkeeper, one estimator and one technician (six 30-minute interviews)

3. Current-state findings

F1. The office is the bottleneck in peak season, not the technicians. In the first cold week of the year the dispatchers answer about 120 calls a day against about 50 on a normal day *(owner's estimate)*. Calls go to the voice mailbox when both lines are busy, and after-hours voice messages are returned the next morning.

F2. Job notes are re-typed. Technicians write notes in the field-service app in their own shorthand. The office manager rewrites them into invoice line items and a customer-facing summary, about 4 minutes per job, longer for installs *(owner's estimate)*, on about 150 jobs a week averaged over the year and 35 to 45 jobs a day in peak season *(owner's estimate)*.

F3. Maintenance-plan renewals live in a spreadsheet. Nobody owns the renewal list. The owner believes 15% to 20% of plans lapse each year without anyone asking the customer *(owner's estimate)*.

F4. Quotes for installs take 3 to 5 working days *(owner's estimate)* because estimators write them after hours from site notes and photos.

F5. Rebate paperwork is error-prone. Utility and government rebate forms for heat pumps and furnaces are filled in by hand from invoices. The bookkeeper reports two to three forms a month sent back for missing details *(owner's estimate)*.

F6. Data is in reasonable shape for a business this size. Customer, equipment and job history are in one system (the field-service app). Maintenance-plan data is the exception (spreadsheet, inconsistent dates).

F7. No AI policy exists. Two staff already paste customer messages into a free consumer chatbot to draft replies. That puts customer names and addresses into a tool the company has not reviewed.

Readiness (our scoring, 1 = weak, 5 = strong)

Dimension	Score	Why
Data	3	Job and customer data in one system; maintenance plans in a spreadsheet
Tools	4	Cloud tools with export and integration options already paid for
People	3	Office team open to help; technicians wary of "more typing"
Process	2	Peak-season steps are informal and depend on two people
Governance	1	No AI policy; unreviewed consumer tool in use with customer data

These scores are our judgement from the interviews, not a measurement.

4. Workflow map and scored AI opportunities

4.1 Workflows mapped (10)

#	Workflow	Hours a week, office *(owner's estimate)*	Error risk	Data sensitivity	Fit for AI
W1	Answering calls and booking jobs	40+ in season	Medium	Medium (names, addresses)	Medium
W2	After-hours voice message follow-up	4	Medium	Medium	High
W3	Job notes to invoice and summary	8 to 10	Medium	Medium	High
W4	Maintenance-plan renewals	3 (when someone gets to it)	High (missed renewals)	Low	High
W5	Install quotes	6 (estimators, after hours)	High (pricing)	Low	Medium
W6	Rebate paperwork	4	High (rejections)	High (owner details, account numbers)	Low for now
W7	Online review replies	1	Low	Low	High
W8	Supplier invoice entry	3	Medium	Low	Medium
W9	Technician scheduling	10	High	Low	Low (the field-service app already does this)
W10	Hiring and onboarding apprentices	2	Low	Medium	Low

4.2 Scored opportunities

Scoring: **Value** (time or revenue protected), **Effort** (how hard to build and run; 5 = easiest), **Risk** (what could go wrong for customers or the business; 5 = safest). Each is 1 to 5; total out of 15. Scores are our judgement, with the reasoning in the last column.

#	Opportunity	Value	Effort	Risk	Total	Reasoning
O2	**Job notes → invoice lines + customer summary.** AI drafts both from the technician's notes and photos; the office manager checks and sends.	4	4	4	**12**	High volume, a human checks every draft, data stays in reviewed tools
O3	**Maintenance-plan renewal assistant.** Clean the plan list, then send each customer a personalised renewal reminder drafted by AI and approved in a batch.	4	4	4	**12**	Protects recurring revenue; low data sensitivity; small build
O1	**After-hours intake assistant.** A web and SMS form, with an AI agent that answers common questions from Larchmere's own service pages and books a call-back; urgent words (gas smell, no heat with infants or seniors) go straight to the on-call technician.	5	3	3	**11**	Biggest peak-season gain; safety routing must be tested hard
O4	**Review reply drafts.** AI drafts replies to online reviews for the owner to approve.	2	5	4	**11**	Quick win, small value; good first exposure for staff

#	Opportunity	Value	Effort	Risk	Total	Reasoning
O5	**Quote first drafts.** AI turns estimator site notes and photos into a quote draft from Larchmere's price book.	4	2	2	**8**	Valuable, but pricing errors cost money; price book not yet structured
O6	**Rebate form pre-fill.** AI fills rebate forms from invoices and equipment records.	3	2	1	**6**	Sensitive personal and account data; program rules change; errors delay customer money

Top 3 for Larchmere: O2, O3 and O1, in that order. O4 is a quick win that can ride along with O2 at almost no extra cost.

4.3 What could go wrong, per top opportunity

#	Main risk	How we would contain it
O2	A draft adds a part or charge the technician did not use	Every draft is checked against the job's parts list before sending; nothing is sent automatically
O3	A reminder goes to a customer who already renewed or moved	Clean the list first; batch approval by the office manager; easy opt-out in every message, per Canada's anti-spam law (CASL)
O1	An urgent safety call is treated as routine	Fixed keyword and question rules route to the on-call technician before any AI step; the agent never gives repair advice; tested with 50 scripted calls before launch

5. Do not do yet

Idea	Why not now	Revisit when
Automated quoting sent straight to customers (beyond O5 drafts)	Pricing errors cost money and trust; the price book is not structured	The price book is in one structured list and O5 drafts have been right for 3 months
AI-filled rebate submissions (O6)	Sensitive personal and account data; program rules change often	A reviewed, paid AI tool and a written AI policy are in place
An AI voice agent answering the main line	Customers in a no-heat emergency want a person; risk to reputation	After-hours intake (O1) has run one full season
Replacing the field-service app	It works; switching costs far exceed any AI gain	Not recommended

6. 90-day roadmap

Weeks	Work	Owner (Larchmere)	Measure of success
1	Write a one-page AI use policy; move staff off the free consumer chatbot to a reviewed business tool	Owner	Policy signed by all office staff
1-2	O2 design: collect 50 past jobs, agree the invoice and summary format, set up the drafting step inside the current tools	Office manager	Format signed off
3-4	O2 pilot on real jobs, every draft checked; O4 review drafts added	Office manager	80% of drafts need only small edits *(target, not a forecast)*

Weeks	Work	Owner (Larchmere)	Measure of success
5-6	O2 live for all jobs; time per job tracked for 2 weeks	Office manager	Time per job down from the baseline the team records in week 1
7-8	O3: clean the maintenance-plan list into one structured source	Bookkeeper	Every plan has a customer, start date and renewal date
9-10	O3: renewal reminders drafted and approved in weekly batches	Office manager	Renewal rate tracked against last year's list
11-12	O1 design and safety test plan (build starts after day 90)	Owner, on-call lead	50 scripted test calls written and agreed

Measures are set by the client in week 1. We do not promise a saving; we agree how it will be measured before work starts.

7. Costs (CAD, estimates)

All figures are **estimates** for this fictional business. A real proposal replaces them with vendor quotes and a fixed Adwaizer price.

Item	One-time	Yearly running	Assumption
O2 job notes drafting (build and setup)	3,000 to 5,000	600 to 1,500	3 to 5 days of build at a small-firm consulting rate; running cost assumes a business AI subscription for 2 office users plus model usage on about 8,000 jobs a year
O4 review reply drafts	0 to 500	included above	Rides on the O2 setup
O3 renewal assistant	2,500 to 4,500	300 to 900	2 to 4 days to clean the list and set up drafting; running cost assumes a reminder or forms tool for about 900 customers
O1 after-hours intake (build after day 90)	3,500 to 6,000	600 to 1,800	4 to 6 days including safety testing; running cost assumes a forms or agent tool plus SMS charges at peak-season volume
Total, three opportunities	**9,000 to 16,000**	**1,500 to 4,200**	Sum of the rows above; the audit fee is separate

Value side (estimate). If O2 cuts the office manager's 4 minutes per job to about 1 minute of checking, on about 8,000 jobs a year, that is about 400 office hours a year, or 6 to 8 hours a week *(estimate: 8,000 jobs from the owner's estimate of about 150 jobs a week; 1 minute of checking is our assumption, to be confirmed in the O2 pilot)*. If O3 brings back even 50 of the plans the owner believes lapse each year, that protects their yearly plan fees *(estimate; the plan price is not given in this sample)*. These are the numbers the week-1 baseline will confirm or correct.

8. Tool choices

Larchmere already pays for a field-service app, QuickBooks Online and Google Workspace, and is not asking to switch. Every opportunity above is designed to work with those tools first.

Need	Option we would put in front of Larchmere	Why it fits
O3 renewal tracking and O1 call-back queue, if the team wants one board for office work	**monday.com** (work management or monday CRM), as an option next to the existing spreadsheet and field-service app	One shared board for renewals and call-backs, with owners and due dates, without changing the field-service app
O1 after-hours intake form and simple answering agent	**Jotform** (Forms and AI Agents), as an option	Quick to stand up a mobile form and an agent that answers only from Larchmere's own service pages
O2 drafting from job notes and photos	A Claude or OpenAI build by Adwaizer, connected to the field-service app's export	Custom logic and checks against the parts list need a small build

We're a monday.com partner, so we may earn a referral fee; the recommendation stands on fit. We are experienced with Jotform. Larchmere can stay on its current spreadsheet and field-service app for all of the above; the partner tools are options, not conditions.

9. What Larchmere would buy next

Next step	What it is	Indicative scope
Build package 1: O2 + O4	Job notes drafting and review replies, built, tested and handed over with a one-page runbook	Fixed scope and fixed price, about 2 weeks *(estimate)*
Build package 2: O3	Renewal list clean-up and renewal reminder drafting	Fixed scope and fixed price, about 2 weeks *(estimate)*
Build package 3: O1	After-hours intake with safety routing and the scripted test plan	Fixed scope and fixed price, 3 to 4 weeks *(estimate)*, after packages 1 and 2
Staff training	Two 90-minute sessions on safe AI use and checking AI drafts, built on the AI use policy from week 1	Half a day *(estimate)*

Each package is quoted separately after this audit. Larchmere can also take this report and build any of it with its own team or another provider.

10. How the work would be delivered

- **Certified delivery:** PMP and PMI-ACP certified; fixed scope and fixed price.
- **Weekly progress:** small deliveries every week, each shown in a live demo.
- **No surprises:** a risk and issue log shared with you, and written acceptance criteria you sign off.

Sample report. Larchmere Home Comfort Ltd. is fictional; any likeness to a real business is a coincidence. Adwaizer AI Consulting Inc. promises no savings or funding outcome; every figure above is an estimate or an owner's estimate as labelled.