> SAMPLE: a fictional Canadian consulting-engineering firm. The firm and everything about it below, its people and every number included, are fictional. Not a client of Adwaizer.

AI Audit report: Tillsbury Vane Consulting Engineers Inc. (sample)

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

What this page is. This is the report a client keeps at the end of the Adwaizer AI Audit, shown for a consulting-engineering firm. Tillsbury Vane is invented to show the format and depth; the firm does not exist, and neither do its people, clients or numbers. 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 vice-president of operations or their staff told us in interviews. Figures marked *(estimate)* are ours and name their assumption next to them. Costs are in Canadian dollars (CAD), before tax.

The area we agreed at kickoff. The audit covers one process area: the office side of a project, from a request for proposal (RFP) to the monthly invoice. That takes in proposal writing, project records, the quality review of drawings and specifications before they are issued, and timesheets. Section 11 lists what it leaves out, including engineering design, calculations and the engineer's seal.

What the audit delivers, and where this report shows it (`growth/business/offer-ai-audit.md:27` to `growth/business/offer-ai-audit.md:33`):

1. A map of 8 to 12 workflows in the one process area agreed at kickoff, each scored on time spent, error risk, data sensitivity and fit for AI: section 4.1, 10 workflows (`growth/business/offer-ai-audit.md:27`).
2. A ranked shortlist of the 3 best opportunities, each with an estimated effort, the tools it would use and what could go wrong: sections 4.2, 4.3, 7 and 8 (`growth/business/offer-ai-audit.md:28`).
3. A one-page "do not do yet" list: section 5 (`growth/business/offer-ai-audit.md:29`).
4. A 90-day plan for the top opportunity, with owner, steps, cost range and how the firm would know it worked: sections 6 and 7 (`growth/business/offer-ai-audit.md:30`).
5. A 45-minute walkthrough with the leadership team, and a short written report the firm keeps: this report is that written report; the walkthrough is a meeting, not a page (`growth/business/offer-ai-audit.md:31`).

The scope limits (one process area, at most 12 workflows, up to 6 interviews of 30 minutes, 2 rounds of written comments) are those of `growth/business/offer-ai-audit.md:33`.

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1. Executive summary

Tillsbury Vane Consulting Engineers is a firm of about 140 people in one office in a mid-sized city in Atlantic Canada. About two thirds of its work is municipal infrastructure (roads, water and wastewater, bridges); the rest is buildings (structural, mechanical and electrical design). Earlier this year a small group of AI champions started meeting, and the firm started a business AI subscription for 15 people. The vice-president of operations asked the question that follows: now that some staff use AI every week, which workflows should change first?

We found the time going to four places. Proposal writing takes about 30 staff hours a week, about half of it rebuilding project sheets and CVs from old files for each RFP *(owner's estimate)*. Timesheets coded to the wrong project or a closed phase hold up the monthly invoice. Drawing and specification sets are checked against each other by eye before tender, and twice in the past year a mismatch reached a contractor and needed an addendum *(owner's estimate)*. Project decisions live in email threads and meeting minutes saved in different folders.

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

1. **Start with a timesheet and project-code check** (opportunity O1) that, before each weekly cutoff, lists entries charged to closed phases, to projects the person is not assigned to, or with no description, for the project manager to fix. It changes no record, uses data the firm already keeps, and gives the project accountant back an estimated 4 hours a week.
2. **Next, an RFP checklist and proposal first drafts** (O2): AI reads the RFP, lists every mandatory requirement, evaluation criterion and page limit, and drafts the project sheets and CV paragraphs from the firm's own library. The project manager writes the approach and sets the fee. Estimated 10 proposal hours a week back.
3. **Then a drawing and specification cross-check** (O3) that, before a tender set is issued, lists where the drawings and the specification name different products, sizes or section numbers, for the reviewing engineer to decide.

We advise **against** letting AI approve, sign or seal any drawing or review comment, against letting it set a fee, and against AI answers to contractors' requests for information (sections 5 and 11). The 90-day plan in section 6 delivers the first opportunity in weeks 1 to 4 and the second in weeks 5 to 10. Estimated cost of the three recommended opportunities: CAD 11,500 to 19,500 one-time plus CAD 1,800 to 4,800 a year to run (section 7).

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2. The firm (fictional)

Item	Detail
Name	Tillsbury Vane Consulting Engineers Inc. (invented)
Location	One office in a mid-sized city in Atlantic Canada
Sector	Consulting engineering: municipal infrastructure (roads, water and wastewater, bridges) and buildings (structural, mechanical, electrical)

Item	Detail
People	About 140: 3 principals, 9 project managers, about 80 engineers and engineers-in-training, about 30 technologists and designers, 1 proposal coordinator and 1 marketing assistant, 1 project accountant and 2 finance staff, 1 IT manager, about 12 administration staff
Volume	About 6 proposals a month, mostly public RFPs; about 4 drawing and specification sets issued for tender a month; about 120 people entering timesheets every week *(owner's estimate)*
Revenue	Not disclosed for this sample
Current tools	Microsoft 365 with project folders on SharePoint; a project-accounting system for timesheets, budgets and invoicing; CAD and BIM software; a PDF markup tool for review comments; a master specification library kept in Word; a business AI subscription for 15 people since the spring
Who we spoke with	Vice-president of operations (the sponsor), a senior project manager in municipal work, the proposal coordinator, the project accountant, a senior structural engineer who reviews tender sets, and the IT manager who leads the AI champions group (six 30-minute interviews)

3. Current-state findings

F1. Every proposal starts from old files. For each RFP the proposal coordinator and a project manager search past proposals for relevant project sheets and staff CVs, then rewrite them for the new client's evaluation criteria. A typical municipal proposal takes 25 to 35 staff hours, of which about half is finding and adapting past material *(owner's estimate)*. The coordinator keeps a spreadsheet of mandatory requirements per RFP by hand; last year one proposal was set aside for a missing signed form *(owner's estimate)*.

F2. Project decisions are hard to find. Meeting minutes, client emails and requests for information are saved by each project manager in their own way: some in the SharePoint project folder, some in Outlook folders. When a project changes hands, or a client asks why a design choice was made, the answer takes an hour or more to find *(owner's estimate)*.

F3. Drawings and specifications are checked against each other by eye. Before a set goes to tender, a senior engineer in each discipline reviews the drawings and the specification together. On a large set that review takes one to two days. Twice in the past year a product or size named on a drawing did not match the specification section, a contractor asked about it during the tender, and the firm issued an addendum *(owner's estimate)*.

F4. Master specifications drift. Project specifications start as copies of the master library. Edits made on one project rarely go back into the master, so the next project may start from an outdated section *(owner's estimate)*.

F5. Timesheets are corrected at month-end. About 120 people enter time weekly. The project accountant finds about 15 entries a week charged to closed phases, to the wrong project or with no description, and chases each by email, about 5 hours a week *(owner's estimate)*. The monthly invoices go out 3 to 4 business days after month-end because of these corrections *(owner's estimate)*.

F6. Monthly progress reports are rewritten from scratch. Many municipal contracts ask for a monthly progress report with the invoice. Project managers write each one from their notes and the project-accounting numbers, about 1 to 2 hours per project a month *(owner's estimate)*.

F7. A few AI champions exist; the rules for project data are not finished. The firm's draft AI use policy lists the approved tools but does not yet say which project documents may go into the business AI tool. Some municipal clients' contracts limit where project documents may be stored, and not every champion knows which clients those are.

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

Dimension	Score	Why
Data	3	Timesheets and budgets sit in one project-accounting system; proposals, minutes and decisions are spread over folders and inboxes
Tools	4	Microsoft 365, the project-accounting system and a business AI subscription are already paid for
People	4	A small group of AI champions and 15 people on the business AI tool; staff are asking where to start
Process	3	A clear path from RFP to invoice, but proposals and review checks depend on each person's own method
Governance	3	A draft AI use policy exists; which project data may go into AI tools is still open

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

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4. Workflow map and scored AI opportunities

4.1 Workflows mapped (10)

#	Workflow	Hours a week, staff *(owner's estimate)*	Error risk	Data sensitivity	Fit for AI
W1	RFP intake and go/no-go: reading the RFP and listing its requirements	4	High (a missed mandatory item)	Low (public documents)	High, with coordinator check
W2	Proposal writing: project sheets, CVs, approach and team sections	30	Medium	Medium (staff details, past client work)	High for first drafts; the approach stays with the project manager
W3	Fee and level-of-effort estimates	8	High (margin)	Medium	Low (the project manager's judgement and a commitment)
W4	Project set-up in the project-accounting system	2	Medium	Low	Low

#	Workflow	Hours a week, staff *(owner's estimate)*	Error risk	Data sensitivity	Fit for AI
W5	Project records: filing emails, minutes and requests for information	10	Medium	High (client documents)	Medium, within the AI use policy
W6	Drawing and specification review before a tender set is issued	12	High (addenda, claims)	Medium	Medium as a cross-check only
W7	Editing master specification sections for a project	6	Medium	Low	Medium
W8	Timesheet entry and corrections	6	Medium (billing delays)	Low	High as a checker only
W9	Monthly invoices and progress reports to clients	8	Medium	Medium	Medium
W10	Contract administration: contractors' requests for information, shop drawings, site reports	15	High (professional liability)	Medium	Low (the engineer's decision)

4.2 Scored opportunities

Scoring: **Value** (time saved or errors avoided), **Effort** (how hard to build and run; 5 = easiest), **Risk** (what could go wrong for clients or for the firm; 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
O1	**Timesheet and project-code check.** Before each weekly cutoff, list entries charged to closed phases, to projects the person is not assigned to, or with no description; each project manager fixes their own.	4	4	5	**13**	Reads only; a person fixes every entry; corrections move from month-end to the week they happen
O2	**RFP checklist and proposal first drafts.** AI reads the RFP, lists mandatory requirements, evaluation criteria and page limits, and drafts project sheets and CV paragraphs from the firm's own library. The project manager writes the approach and sets the fee.	5	3	4	**12**	Largest time gain and the question the champions keep getting; RFPs are public, but staff and past-client details need the policy in week 1
O3	**Drawing and specification cross-check.** Before a tender set is issued, list where drawing notes and schedules and the specification name different products, sizes or section numbers; the reviewing engineer decides every change.	4	3	4	**11**	Targets the addenda in F3; changes nothing and seals nothing; drawing formats vary, so it needs testing on past sets

#	Opportunity	Value	Effort	Risk	Total	Reasoning
O4	**Project records filing and decision log.** File minutes and client emails into the project folder and keep a dated list of decisions with links to their source, for the project manager to confirm.	3	4	4	**11**	Answers F2; needs the week-1 policy on client documents first
O5	**Monthly progress report drafts.** Draft each report from the project manager's notes and the project-accounting numbers, for the project manager to edit and send.	3	4	3	**10**	Saves 1 to 2 hours per project a month; a wrong figure reaches a client, so every number is checked
O6	**AI that approves, signs or seals drawings or review comments, or sets fees, on its own.**	2	2	1	**5**	A seal and a fee are commitments a licensed engineer and the firm must stand behind; they stay with people

Top 3 for Tillsbury Vane: O1, O2 and O3, in that order. O4 can follow O2 once the policy on client documents is settled.

4.3 What could go wrong, per top opportunity

#	Main risk	How we would contain it
O1	The check misses a miscoded entry, and the project accountant stops their own month-end review	It runs beside the month-end review for the first 6 weeks; both lists are compared before the manual review is reduced
O2	A draft claims experience the firm does not have, or the checklist misses a mandatory item	Every project sheet and CV paragraph comes only from the firm's own library and is read by the project manager; the coordinator checks every requirement against the RFP; the checklist is tested on 10 past RFPs before go-live
O3	A mismatch is missed and the reviewer trusts the list	The list is an extra check beside the engineer's own review, never a replacement; the engineer signs the review as today; it is tested on 2 past tender sets with known addenda before use

5. Do not do yet

Idea	Why not now	Revisit when
AI approving, signing or sealing drawings or review comments (O6)	The seal and the review are a licensed engineer's professional responsibility	Not recommended
AI setting fees or level of effort in a proposal	The fee is a commitment the firm must honour; it rests on the project manager's knowledge of the work	Not recommended
AI drafting answers to contractors' requests for information during construction	The answer is a professional decision with liability attached	O4's decision log has run for six months and the firm has checked with its professional liability insurer

Idea	Why not now	Revisit when
Replacing the project-accounting system	A larger change than an AI step; budgets, rates and history would have to move first	O1 has run for a year and the firm has its own reason to change

6. 90-day roadmap

Weeks	Work	Owner (Tillsbury Vane)	Measure of success
1	Finish the AI use policy: which project documents may go into the business AI tool, and which client contracts restrict them; share it with every champion	Vice-president of operations	Policy approved by the principals
1-2	O1 design: export three months of timesheets, project codes, phases and assignments; agree what counts as a suspected miscoding	Project accountant	Rules signed off
3-4	O1 live beside the weekly timesheet cutoff	Project accountant	Suspected miscodings fixed before cutoff, tracked against month-end corrections
5-6	O2 design: gather the library of project sheets and CVs; test the checklist and drafts on 10 past RFPs	Proposal coordinator	Test results signed off
7-10	O2 pilot on live RFPs; the project manager writes the approach and sets the fee; the coordinator checks every requirement	Senior project manager	90% of mandatory requirements on the checklist before the coordinator's own read *(target, not a forecast)*
11-12	O3 design: agree the checks with the senior reviewer; pick 2 past tender sets for testing (build starts after day 90)	Senior structural engineer	Checks 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 firm. A real proposal replaces them with vendor quotes and a fixed Adwaizer price. The audit fee is not part of this sample.

Item	One-time	Yearly running	Assumption
O1 timesheet and project-code check	2,500 to 4,500	300 to 900	2 to 4 days of build at a small-firm consulting rate; running cost assumes model usage on about 6,000 timesheets a year
O2 RFP checklist and proposal first drafts	5,000 to 8,000	900 to 2,400	5 to 8 days including tests on past RFPs; running cost assumes the business AI subscription extended to the proposal team plus document reading on about 70 RFPs a year
O3 drawing and specification cross-check (build after day 90)	4,000 to 7,000	600 to 1,500	4 to 7 days including tests on past tender sets; running cost assumes document reading on about 50 sets a year
Total, three opportunities	**11,500 to 19,500**	**1,800 to 4,800**	Sum of the rows above

Value side (estimate). If O2's checklist and first drafts cut about a third of the 30 proposal hours a week, that is about 10 staff hours a week *(estimate: 30 hours from the owner's estimate in W2; the one-third is our assumption, to be confirmed in the O2 pilot)*. If O1 replaces most of the project accountant's chasing with a weekly list the project managers work through, that is about 4 hours a week *(estimate: from the 5 hours in F5)*. These are the numbers the week-1 baseline will confirm or correct.

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8. Tool choices

Tillsbury Vane already pays for Microsoft 365, its project-accounting system and a business AI subscription, 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 Tillsbury Vane	Why it fits
O1 suspected-miscoding list and O2 proposal tracking, if the office wants one board for them	**monday.com** (work management), as an option next to SharePoint and the project-accounting system	One shared board for each week's corrections and each live RFP, with an owner and a due date, without changing the accounting system
A go/no-go form that collects each RFP's deadline, mandatory items and team in one place	**Jotform** (Forms), as an option	RFPs arrive in the same shape, which makes O2's checklist simpler
O2 checklist and drafts, O3 cross-check	A build by Adwaizer on the business AI subscription the firm already has, with the firm's library and a person's check step	The firm's own library and drawing formats need a small build; project documents stay in reviewed tools under the week-1 policy

We're a monday.com partner, so we may earn a referral fee; the recommendation stands on fit. New to monday.com: https://try.monday.com/q1hi6cfy4tr6. We are experienced with Jotform. Tillsbury Vane can stay on SharePoint, its spreadsheets and email for all of the above; the partner tools are options, not conditions.

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9. What Tillsbury Vane would buy next

Next step	What it is	Indicative scope
Build package 1: O1	Timesheet and project-code check, handed over tested with a one-page runbook	Fixed scope and fixed price, about 1 week *(estimate)*
Build package 2: O2	RFP checklist and proposal first drafts from the firm's library, with the coordinator's check step	Fixed scope and fixed price, about 2 weeks *(estimate)*
Build package 3: O3	Drawing and specification cross-check for the reviewing engineer	Fixed scope and fixed price, 2 to 3 weeks *(estimate)*, after packages 1 and 2
Champion workshop	Two 90-minute sessions for the AI champions on checking AI output and applying the week-1 policy to project documents	Half a day *(estimate)*

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

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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.

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11. Not covered by this audit

The audit looked at the office side of a project only (the area agreed at kickoff). It did not review:

- engineering design, calculations, models or the drawings' technical content;
- sealing, signing and the engineer of record's professional responsibility;
- field inspection, site safety or any health and safety duty;
- the project-accounting system itself or a replacement for it, and the firm's fee rates.

Any of these would be a separate engagement, scoped on its own.

Sample report. Tillsbury Vane Consulting Engineers is fictional; any likeness to a real firm or business is a coincidence. Adwaizer AI Consulting Inc. promises no savings or results; every figure

above is an estimate or an owner's estimate as labelled.