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AI Opportunity Assessment Management Report

Prioritizing AI opportunities, business case and implementation roadmap

For ABC Manufacturing s.r.o. — fictitious example

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Prepared by	AI Mentoring s.r.o. / AIM

All companies, processes, values and financial calculations in this document are fictitious and illustrative.

DOCUMENT NOTE
THIS REPORT IS AN EXAMPLE OF THE OUTPUT OF THE AI OPPORTUNITY ASSESSMENT SERVICE. IN A REAL ENGAGEMENT, CONCLUSIONS, SCORES, AND ECONOMIC ESTIMATES ARE DERIVED FROM WORKSHOPS, PROCESS INTERVIEWS, AND VERIFIED CUSTOMER DATA.

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1. Executive Summary

ABC Manufacturing has strong practical potential for using AI, especially in technical sales and offer preparation, quality, and production planning. The assessment identified 12 opportunities, five of which can be considered Quick Wins. We recommend starting with a focused pilot for automating RFQ processing while preparing the data foundations for a strategic production-planning project. The estimates are qualified estimates and must be refined through measurement in the pilot.

MANAGEMENT DECISION

OVERALL ASSESSMENT	High AI potential, but data readiness varies across processes. The fastest value can be captured in document and administrative workflows.
LARGEST OPPORTUNITY	AI/optimization-based production planning has the highest strategic impact; however, it requires improved master-data quality and actual production-time data.
FASTEST QUICK WIN	Automating RFQ intake and offer preparation. The data is available, and the pilot can initially run without direct writes to the ERP.
MAIN RISK	Inconsistent data definitions, varying quality of technical source materials, and the risk of making the first pilot too broad.
AIM RECOMMENDATION	Launch a 6–8-week RFQ assistant pilot, introduce consistent KPIs, and prepare a production-planning data package in parallel.

KEY ASSESSMENT METRICS

Metric	Value	Comment
Number of identified AI opportunities	12	Opportunities in sales, production, quality, maintenance, procurement, finance, HR and reporting.
Number of Quick Wins	5	Initiatives with Impact Score ≥ 70 and Complexity Score ≤ 40.
Top recommended initiative	A1 — RFQ and offers	High impact, available historical data, low security risk, and clearly measurable time savings.
Estimated annual potential	CZK 2.6–4.1 million	Gross qualified portfolio potential; without pilots, individual benefits cannot be considered guaranteed or fully additive.
Recommended first pilot	6–8 weeks	Focused pilot for 3–5 users and approximately 300 historical RFQs, without autonomous offer sending.

PRIORITY INITIATIVES SUMMARY

#	Initiative	Category	Impact Score	Ease of Implementation	Recommendation
1	A1 — RFQ processing and offer preparation	Quick Win	88	76	Pilot now
2	A3 — Quality reports and nonconformities	Quick Win	78	74	Pilot after A1

3	A4 — Production planning	Strategic	93	45	Prepare data and PoC

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2. Analysis objectives and scope

The assessment was designed as a decision-support analysis. Its purpose was to identify and compare opportunities by business impact, feasibility, risk, data readiness, and expected return.

Area	Description
Assessment objective	Identify concrete AI opportunities, prioritize them, and propose a first feasible pilot and a 12-month roadmap.
Areas analyzed	Sales and offers, production and planning, quality, maintenance, procurement, finance, HR, management reporting, and IT/data.
People involved	Managing director, CFO, production director, sales director, quality manager, production planner, procurement manager, IT manager, and key users.
Inputs used	Two workshops, eight process interviews, sample RFQs and offers, quality reports, anonymized ERP exports, and 24 months of aggregated operational data.
Out of scope	Solution development, detailed cybersecurity and legal audit, record-level validation of all data, and a binding implementation quotation.

RECOMMENDED INTERPRETATION
THE ASSESSMENT PROVIDES A QUALIFIED BASIS FOR DECISION-MAKING AND INVESTMENT PRIORITIZATION. IT IS NOT A SUBSTITUTE FOR A DETAILED TECHNICAL SPECIFICATION OR A GUARANTEE OF FUTURE SAVINGS.

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3. Company context and key processes

ABC Manufacturing s.r.o. is a fictitious Czech manufacturer of electromechanical assemblies for industrial customers. The company employs approximately 240 people, operates two production sites, and has annual revenue of approximately CZK 620 million. Its production is make-to-order and medium-volume, with a high proportion of technical documentation, changing requirements, and manual coordination between sales, engineering, production, and quality. The application landscape is centered on ERP, MES, QMS/DMS, Microsoft 365, and several operational Excel workbooks.

Process area	Current state	Systems used	Type of work	AI potential
Sales and offers	RFQs arrive by email in various formats. Data is manually transcribed into working Excel files and the ERP.	Email, ERP, CRM, Excel, DMS	Documents, technical requirements, calculations	High
Production and planning	Daily replanning based on priorities, capacity, and material availability; some decisions depend on the planner's experience.	ERP, MES, Excel	Planning, capacity, deadlines, exceptions	High
Quality and maintenance	Nonconformities and interventions are recorded, but text descriptions are inconsistent and trends are analyzed mostly manually.	QMS/DMS, MES, Excel	Reports, classification, documentation, manuals	High
Finance and procurement	Invoices, delivery notes, and supplier offers are processed in various formats; checking is largely manual.	ERP, email, DMS, Excel	Documents, comparison, approval	Medium to high
IT and data	Exports and partial APIs exist, but data ownership and the definitions of some operational metrics are not standardized.	Databases, BI, integration services	Data, integration, permissions, monitoring	Medium

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4. Identified problems and inefficiencies

The largest losses occur at the interfaces between departments: when converting a customer request into an offer, during manual production replanning, when documenting nonconformities, and when locating technical knowledge. A significant share of the work takes place in email and Excel, increasing dependence on individuals and limiting process measurability.

Problem / inefficiency	Business impact	Affected areas	Potential AI direction
Manual extraction of RFQs, drawings, and attachments	Long response times, repeated transcription, and risk of missing a requirement	Sales, engineering, costing	Document AI assistant with validation and human approval
Daily production replanning in ERP and Excel	Dependence on planners' experience, overtime, and priority conflicts	Production, logistics, management	Optimization planner with time and risk prediction
Inconsistent quality and nonconformity reports	Time loss, slower nonconformity closure, and difficult root-cause analysis	Quality, production, customer service	AI pre-population, summarization, and classification
Time-consuming searches in manuals and internal documentation	Downtime and dependence on experienced employees	Maintenance, production, quality	Internal knowledge assistant with permissions

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5. AI opportunity overview

The 12 opportunities below were assessed using the AIM Opportunity Score methodology. Categories reflect the balance between business impact and implementation effort; red flags may qualify the final recommendation.

#	AI opportunity	Area	Brief description	Category
1	A1 — RFQ processing and offer preparation	Sales / engineering	Automatically extract requirements from emails and documents, prepare a structured brief, and draft the offer record.	Quick Win
2	A2 — Internal technical knowledge assistant	Production / quality / maintenance	Secure search and answers across manuals, policies, work instructions, and historical solutions.	Quick Win
3	A3 — Assistant for quality and nonconformity reports	Quality	Pre-population of a nonconformity report, evidence summarization, classification suggestions, and support for preparing 8D materials.	Quick Win
4	A4 — AI/optimization-based production planning	Production / planning	Plan orders by capacity, competencies, deadlines, materials, and priorities, with alternative recommendations.	Strategic
5	A5 — Prediction of order-delay risk	Production / logistics	Early warning for orders at risk of delay based on operation status, materials, and historical patterns.	Strategic
6	A6 — Visual quality inspection	Quality / production	Camera-based inspection of selected visual defects for a stable product or operation.	Strategic
7	A7 — Invoice and delivery-note processing	Finance / logistics	Extraction from invoices and delivery notes, matching against the purchase order, and preparation of ERP data.	Quick Win
8	A8 — Supplier-offer comparison	Procurement	Structured comparison of prices, lead times, terms, and risks in supplier offers.	Experiment / Pilot
9	A9 — Maintenance assistant over manuals and history	Maintenance	Answers across manuals and intervention history, diagnostic-procedure suggestions, and intervention summaries.	Quick Win
10	A10 — Energy-consumption anomaly detection	Facilities / production	Detection of unusual consumption and alerts about likely operational causes.	Postpone
11	A11 — HR onboarding assistant	HR	Guided onboarding, answers to internal questions, and a personalized task list.	Experiment / Pilot
12	A12 — Automated reporting commentary	Finance / management	Automatic preparation of a first draft of commentary on recurring KPIs and variances.	Experiment / Pilot

SELECTION RULE
ONLY INITIATIVES WITH A CLEAR OWNER, AVAILABLE INPUTS, AND A MEASURABLE PILOT KPI WERE INCLUDED IN THE FIRST IMPLEMENTATION WAVE. A HIGHER OVERALL SCORE DOES NOT OVERRIDE CRITICAL SECURITY OR DATA CONSTRAINTS.

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6. AIM Opportunity Score

AIM Opportunity Score combines 12 criteria into an overall score from 0–100. For management, results are grouped into Business Value, Feasibility, Risk & Readiness, and AI Fit & Speed. Position in the prioritization matrix is determined separately by Impact Score and Complexity Score.

Score area	What it means	Interpretation
Impact Score	Business benefit, time savings, cost reduction, and expected return.	≥ 70 indicates high impact.
Ease of Implementation	Data availability and quality, technical feasibility, integration, security, and speed of implementation.	A higher value means easier implementation.
Complexity Score	100 − Ease of Implementation.	≤ 40 indicates relatively low complexity.
Overall AIM Opportunity Score	Weighted evaluation of all criteria on a 0–100 scale.	Used to rank initiatives within quadrants.

GROUPED REPORT

Initiative	Business Value	Feasibility	Risk & Readiness	AI Fit & Speed	Overall score	Category
A1 — RFQ and offers	88	80	74	86	84	Quick Win
A7 — Invoices and delivery notes	74	84	81	89	81	Quick Win
A3 — Quality and nonconformities	82	76	73	82	79	Quick Win
A2 — Knowledge assistant	72	83	80	88	78	Quick Win
A12 — Reporting commentary	70	82	75	85	77	Experiment / Pilot
A5 — Delay risk	88	62	68	78	75	Strategic

RED FLAGS

Identified red flag	Impact	Recommended response
A4: actual production times are not consistent across all operations	Soft — limits planner accuracy	First perform data profiling and run a pilot on one production line.
A6: a sufficiently large labeled image dataset is missing	Soft — accuracy cannot yet be estimated	Carry out 4–6 weeks of image collection and annotation before the PoC.
A10: energy consumption is measured too aggregately	Soft — low diagnostic value	Add sub-metering or postpone the initiative.
No hard security red flag was identified	Positive conclusion	Retain human control and obtain IT/security approval before the pilot.

7. Prioritization matrix

	Low complexity / high ease	High complexity / lower ease
High impact	QUICK WINS — A1, A2, A3, A7, A9	STRATEGIC PROJECTS — A4, A5, A6
Lower impact	EXPERIMENTS / PILOTS — A8, A11, A12	POSTPONE / NOT RECOMMENDED — A10

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8. Top-priority initiatives

TOP INITIATIVE 1 — A1 RFQ AND OFFER PREPARATION

Field	Contents
Initiative name	Intelligent RFQ processing and preparation of offer materials
Affected process / department	Sales, engineering, costing, and partly procurement
Current problem	Approximately 1,200 RFQs arrive each year in emails, PDFs, and spreadsheets. Data is manually located and transcribed; average active work is approximately 75 minutes per case.
Proposed AI solution	Extraction of requirements and key parameters, completeness checking, comparison with master data, and creation of a structured brief. Everything is subject to user confirmation.
Expected impact	45% less active work, faster first response to the customer, fewer missed requirements, and more consistent inputs for costing.
Feasibility	A historical RFQ sample and master-data export are available. The pilot can run independently without direct ERP writes.
Risks and assumptions	Technical source materials come in different formats; a data dictionary, validation of critical fields, and a precisely defined document scope are required.
Recommendation	Pilot now — first implementation priority.

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TOP INITIATIVE 2 — A3 QUALITY AND NONCONFORMITIES

Field	Contents
Initiative name	AI assistant for quality reports, nonconformities, and 8D materials
Affected process / department	Quality, production, customer service
Current problem	Approximately 1,600 nonconformity records and inspection reports are created each year. Some data is repeated and text descriptions are inconsistent, complicating trend analysis.
Proposed AI solution	Pre-population of the report from available data, evidence summarization, classification suggestions, and a draft problem description or 8D material. The final document is approved by a quality professional.
Expected impact	50% less documentation time, faster nonconformity closure, and more consistent data for root-cause analysis.
Feasibility	Forms and history are available in QMS/DMS. The work can start with one type of nonconformity without integrating all sources.
Risks and assumptions	A standard cause taxonomy, review of expert claims, and clear separation of the AI draft from the approved conclusion are required.
Recommendation	Pilot as a second wave after validating the A1 pattern.

TOP INITIATIVE 3 — A4 PRODUCTION PLANNING

Field	Contents
Initiative name	AI/optimization-based planner for production and workforce capacity
Affected process / department	Production, planning, logistics, management
Current problem	The plan is adjusted manually every day based on deadlines, materials, competencies, capacity, and changing priorities. The outcome depends on the experience of a few people, and alternatives are difficult to compare.
Proposed AI solution	An optimization engine supported by production-time prediction that proposes a feasible plan, quantifies conflicts, and enables scenario comparison. The decision remains with the planner.
Expected impact	30% less planner time, a 5–8% reduction in selected overtime and replanning, and a 3–5 percentage-point increase in on-time deliveries.
Feasibility	Basic data exists in ERP/MES, but actual times and some relationships are inconsistent. A PoC in one production area is recommended.
Risks and assumptions	Routing quality, planners' change readiness, the need for an integration interface, and clear priority rules.
Recommendation	Strategic initiative — prepare data in months 1–4 and launch a focused PoC in the second half of the roadmap.

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9. Technical feasibility

Technical feasibility was assessed at the level of architectural options, available inputs, and pilot scope. Detailed integration, performance requirements, and the security design must be part of the specification for the specific pilot.

Initiative	Required data	Integration	Technical complexity	Note
A1 — RFQ and offers	Emails, PDF/XLSX attachments, master data, offer history	Low to medium	Medium	The pilot can run on document copies and an ERP export; write-back to ERP only after validation.
A3 — Quality and nonconformities	QMS forms, photographs, code lists, historical reports	Low to medium	Medium	Start with one type of nonconformity and mandatory human approval.
A4 — Production planning	Orders, operations, calendars, capacity, competencies, materials, actual times	High	High	Requires data profiling, an optimization model, and subsequent connection to ERP/MES.

TECHNICAL CONCLUSION
A1 AND A3 ARE SUITABLE FOR A FAST PILOT BECAUSE THEIR VALUE CAN BE TESTED ON A LIMITED DATASET AND WITHOUT CRITICAL PRODUCTION INTEGRATION. A4 HAS SIGNIFICANTLY HIGHER IMPACT BUT REQUIRES A SEPARATE DATA AND INTEGRATION PHASE.

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10. Security and regulatory recommendations

All proposed initiatives must respect customer data classification, user permissions, and the principle that generated output is a draft until confirmed by the responsible employee. Legal and regulatory assessment must be carried out for the specific operating scenario.

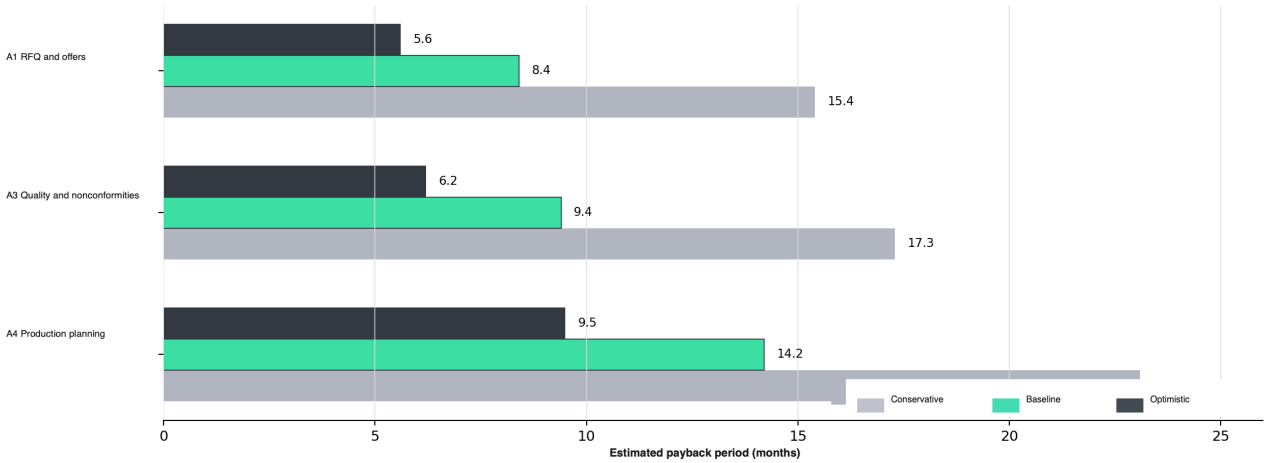
Area	Recommendation	Implementation note
Sensitive data	For the pilot, use limited, anonymized, or pseudonymized document copies unless production data is essential.	Prohibit entering confidential documents into unapproved public AI tools.
Access rights	The AI layer must respect source-system permissions and display only content available to the user.	For the knowledge assistant, filter documents before retrieval, not only after the answer has been generated.
Cloud / on-premise	Choose the environment according to data classification, contractual terms, and internal IT policy.	The pilot can run in a separate tenant or a private instance of an approved cloud.
Human-in-the-loop	Offers, quality conclusions, and the production plan must not be automatically approved or sent during the pilot.	The user must see the source materials and be able to edit or reject the draft.
Auditability	Log the model version, inputs, sources, output draft, user intervention, and final decision.	Set retention periods and access restrictions for logs.

11. Economic evaluation

The economic calculations are qualified estimates based on illustrative workload, cost levels, and an assumed adoption rate. They do not include potential revenue upside or secondary strategic benefits. The baseline scenario must be verified in the pilot through actual measurement before and after deployment.

Initiative	Time savings	Annual financial impact	Estimated cost	Payback	Assumptions
A1 — RFQ and offers	56 h/month	CZK 529k gross / CZK 457k net	CZK 320k + CZK 72k/year	8.4 months	1,200 RFQs/year; 75 min; 45% savings; CZK 650/h; CZK 90k fewer rework costs.
A3 — Quality and nonconformities	39 h/month	CZK 391k gross / CZK 331k net	CZK 260k + CZK 60k/year	9.4 months	1,600 records/year; 35 min; 50% savings; CZK 580/h; CZK 120k quality effect.
A4 — Production planning	50 h/month + operational effect	CZK 1.32m gross / CZK 1.14m net	CZK 1.35m + CZK 180k/year	14.2 months	600 h/year of planner time + CZK 900k effect from overtime, changes, and delays.

ESTIMATED PAYBACK SCENARIOS



The conservative scenario uses lower adoption and benefits; the optimistic scenario assumes high-quality data and rapid user adoption. Revenue upside is not included.

CALCULATION ASSUMPTIONS

Assumption	Value / explanation
Average hourly labor cost	CZK 580–700/h by role; fully loaded qualified estimate.
Process frequency	1,200 RFQs/year; 1,600 nonconformities and reports/year; planning is performed daily.
Number of people involved	RFQ: 6–8 roles; quality: 5–7 users; planning: 3 main planners + production manager.
Expected automation rate	A1 45%, A3 50%, A4 30% planning-time savings; the decision remains with a person.
Estimate limitations	Unvalidated adoption, document variability, possible integration costs, and unclear additivity of benefits across the portfolio.

12. Recommended roadmap

Phase	Horizon	Activities	Outputs
Phase 1 — Validate value	0–3 months	Define and run the A1 pilot; define governance; establish baseline KPIs; profile data for A4.	Working RFQ pilot, measured savings and accuracy, scale-up decision, and a list of planning-data gaps.
Phase 2 — Expand Quick Wins	3–6 months	Limited production deployment of A1; A3 pilot; A2 internal knowledge assistant; standardization of code lists and permissions.	Two to three operational initiatives, trained users, unified monitoring, and an updated business case.
Phase 3 — Strategic scaling	6–12 months	A4 PoC in a selected production area; A5 delay prediction; A6 decision; expansion of successful Quick Wins.	Validated planning model, integration roadmap, KPI portfolio, and investment plan for the next period.

The roadmap combines rapid value validation with the gradual preparation of strategic data and integration prerequisites. The first three months should create a credible measurement pattern that can then be reused for other initiatives.

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13. Recommended first pilot

Area	Recommendation
Pilot name	AIM RFQ Assistant — intelligent processing of customer inquiries
Why this pilot	It combines high business impact, an available historical sample, limited integration, and clearly measurable active processing time.
Scope	One type of product inquiry, 300 historical RFQs, and 3–5 users; extraction of agreed fields, completeness checking, and a structured brief; no automatic sending or binding quotation.
Duration	6–8 weeks including data preparation, configuration, user testing, and evaluation.
Indicative budget	CZK 280,000–380,000 excl. VAT depending on the number of formats, integration scope, and required security level.
Success criteria	≥ 35% reduction in active work; ≥ 90% accuracy for agreed critical fields after human validation; ≥ 80% acceptance by pilot users; no security incident.
Decision after the pilot	Expand to other RFQ types / adjust the model and process / stop if the baseline economic and quality KPIs are not achieved.

RECOMMENDED NEXT STEP
APPROVE A DETAILED-SCOPE WORKSHOP, CONFIRM THE BUSINESS OWNER, PROVIDE AN ANONYMIZED SAMPLE OF 300 RFQS, AND FINALIZE THE PILOT SCOPE, SECURITY MODE, AND MEASUREMENT PLAN WITHIN TWO WEEKS.

14. Risks and assumptions

Risk	Impact	Likelihood	Recommended action
Variable quality of RFQs and technical attachments	Medium to high	Medium	Limit the pilot to defined formats, introduce a confidence threshold, and require validation of critical fields.
Inconsistent production data for A4	High	High	Data profiling, standardization of code lists, and a PoC in only one production area.
Insufficient user adoption	High	Medium	Involve users in the design, measure real work, and make it easy to correct the draft.
Scope expansion without a budget change	Medium	Medium to high	Fix the inputs, document types, systems, and KPIs; manage changes through a change request.

SUCCESS ASSUMPTIONS

- A business owner is assigned to the priority initiative.
- Key users are available for validation.
- Data is available, or there is a realistic plan to prepare it.
- IT/security is involved early in the pilot design.

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15. Recommended next steps

1. Within 10 working days, confirm the owner and scope of the RFQ pilot.
2. Prepare an anonymized document sample and define critical fields and sources of truth.
3. Agree on baseline KPIs, the security mode, and the stage gate after 6–8 weeks.
4. In parallel, profile the actual production-time data for A4.
5. After the pilot, update the business case and decide whether to expand the portfolio.

AIM FINAL RECOMMENDATION
ABC MANUFACTURING SHOULD NOT START A BROAD TRANSFORMATION PROGRAM WITH ONE LARGE PROJECT. WE RECOMMEND VALIDATING VALUE THROUGH A CLEARLY BOUNDED RFQ PILOT, CREATING A REPEATABLE SECURITY AND MEASUREMENT FRAMEWORK, AND ONLY THEN EXPANDING THE QUICK WINS. STRATEGIC PRODUCTION PLANNING HAS THE HIGHEST POTENTIAL, BUT IT MUST BE MANAGED AS A SEPARATE DATA AND CHANGE PROJECT.

16. Appendices

Appendix	Description
Detailed scoring of all opportunities	12 initiatives with Impact Score, Ease/Complexity, grouped report, overall score, category, and red flags.
AIM Opportunity Score methodology	Criteria 1–5, weights, quadrant thresholds, and rules for hard and soft red flags.
Interview and workshop list	Fictitious: 2 management workshops and 8 process interviews across key roles.
Detailed business case calculations	Scenarios, implementation and operating costs, savings assumptions, and payback sensitivity.
Process and data notes	List of source systems, data owners, missing inputs, and recommended validations.

17. Contact

This document is a fictitious example. In a real engagement, AIM would review the assessment findings with you, refine the pilot scope, and prepare a specific implementation proposal.

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