SAMPLE REPORT

AIRA AI READINESS & RISK

AI Readiness Snapshot

Findings, ranked use cases and a 90-day plan

Prepared for
Harbor Point Supply Co.

Engagement
Readiness Snapshot · 2 weeks

Readout
Day 10

Sample report. Harbor Point Supply Co. is a fictional, 240-person industrial distributor with a 35-seat customer service center. Every name, score and cost here is illustrative, so you can see what a real Snapshot delivers.

EXECUTIVE SUMMARY

Ready to pilot one use case, after six weeks of knowledge and policy work

AIRA Score

54/100

Getting ready

0–39 not ready · 40–59 getting ready · 60–79 ready to pilot · 80+ AI-ready

Your answers live in people, not systems.
Roughly a third of customer questions are answered from memory or from PDFs last updated in 2023. An AI assistant would repeat the gaps confidently.

Staff are already using public chatbots with customer data.
The shadow AI scan found 4 unapproved tools in daily use, and no written AI policy.

Your systems are in better shape than you think.
The ERP and phone platform both expose order and ticket data through supported connections, so the first use case needs no new integration project.

Our recommendation

Spend weeks 1–6 cleaning up the top 150 customer answers and adopting an AI use policy. Then pilot **AI-drafted order-status replies for email and chat**, with an agent approving every reply. Skip the customer-facing voice bot for now; it fails on the same knowledge gaps.

SCORECARD

Six layers, scored 0 to 100

Each score blends interviews, a review of sample records in 3 systems, and the shadow AI scan. The "fix first" line is the single change that moves the score most.

LAYER	SCORE	WHAT WE FOUND
01 Data foundation	**48** Getting ready	About 1 in 8 customer accounts in the ERP is a duplicate, and ship-to addresses are free text. Order and invoice data is reliable. **Fix first:** merge duplicate accounts and name an owner for customer master data.
02 Systems and integration	**61** Ready to pilot	ERP, phone platform and help desk all support standard connections; the help desk already pulls order status. **Fix first:** give the pilot read-only access to order status, nothing more.
03 Knowledge readiness	**44** Getting ready	312 knowledge articles; 41% have no owner and 28% contradict another article. Senior agents keep their own notes. **Fix first:** rewrite the 150 answers behind 80% of contacts, each with an owner and review date.
04 Process and workflow	**57** Getting ready	Contact reasons are tracked, so volumes are known: order status is the top reason at 31% of contacts. Returns and credits run on email chains. **Fix first:** document the returns process before anyone automates it.
05 Governance and risk	**38** Not ready yet	No AI policy, no approved-tools list, and nobody accountable for AI risk. Customer emails are being pasted into public chatbots. **Fix first:** adopt a 2-page AI use policy and approve one business chatbot account with data controls.
06 People and skills	**63** Ready to pilot	The COO sponsors AI and two team leads are eager champions. Agents fear for their jobs and haven't been told the plan. **Fix first:** tell agents what AI will and won't do, and involve them in the pilot.

How to read this: the overall AIRA Score of 54 is weighted toward the layers your first use case depends on most: knowledge, data and governance. Two layers are ready today; governance is the one blocker you can close fastest.

USE CASES, RANKED

Where AI pays back first

USE CASE	VALUE	EFFORT	RISK	ROUGH COST (YR 1)	VERDICT
1. AI-drafted order-status replies (email and chat), agent approves each one	●●●●○	●●○○○	Low	$18K–$30K	Do now
2. Agent assist: suggested knowledge answers during calls	●●●●○	●●●○○	Low	$25K–$45K	Next, after cleanup
3. Call summaries and contact-reason tagging	●●●○○	●○○○○	Medium	$8K–$15K	Do now
4. Quote drafting for inside sales	●●●○○	●●●○○	Medium	$20K–$35K	Later
5. Customer-facing voice bot for order status	●●●●○	●●●●○	High	$60K–$110K	Not yet

Costs are rough ranges for software and setup, before staff time, to compare options; they are not quotes. AIRA doesn't sell or resell any of these tools.

The "not yet" list

Customer-facing voice bot. It would read from the same knowledge base that contradicts itself 28% of the time. Revisit after the cleanup and 90 days of use case 1.

AI credit and returns decisions. The process isn't written down, and automated credit decisions raise fairness and audit questions.

A company-wide chatbot rollout. Without a policy and training, it spreads today's shadow AI problem to everyone.

Shadow AI quick scan

TOOL TYPE	USED BY	RISK
Personal accounts on public chatbots	~12 agents, 3 sales reps	High
Browser AI writing extension	Inside sales	Medium
AI meeting note-taker	2 managers	Medium
AI features in the help desk, switched on by default	All agents	Low

Found through interviews, a short staff survey and a review of browser extensions. Nobody was disciplined; the goal is to bring this use into the open.

90-DAY PLAN

What to do, in order, and who owns it

Days 1–30 · Make it safe

- Adopt the 2-page AI use policy · COO
- Approve one business chatbot account with data controls; retire personal accounts · IT manager
- Tell agents the plan and pick 4 pilot agents · CS director
- Start rewriting the top 150 answers · 2 team leads

Days 31–60 · Get the data right

- Finish the 150 answers, each with an owner and review date · Team leads
- Merge duplicate customer accounts · ERP admin
- Turn on call summaries and contact-reason tagging (use case 3) · CS director
- Choose the drafting tool for use case 1 using our criteria · COO + IT

Days 61–90 · Pilot and measure

- Pilot AI-drafted order-status replies with 4 agents, every reply approved · CS director
- Weekly review of wrong or risky drafts · Team leads
- Day-90 decision: scale, adjust or stop · COO

How you'll know it worked

MEASURE	TODAY	DAY-90 TARGET
Time to answer an order-status email	6 hrs average	Under 1 hr
Knowledge articles with an owner and review date	59%	100% of the top 150
Staff using unapproved AI tools with customer data	~15	0
Drafts sent without an agent edit	n/a	Tracked weekly; scale only if above 70%

What happens next is up to you. You keep this report whether or not you work with us again. Clients usually choose one of three paths: run the plan themselves; move to the **AIRA Readiness Assessment** ($12,500, with the $3,500 Snapshot fee credited) for a full business case; or add **Readiness Advisory** ($3,000/month) for check-ins while they build.

Want a report like this for your company?

Readiness Snapshot · $3,500 fixed · 2 weeks. Start with the free AIRA Score, or call Scott at 281-630-0112.

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