AGENTREADY / BUSINESS TRANSFORMATION REPORT

Example Auto Transport (fictional)

Back-office review

Assessment date
November 2, 2026

Report date
November 16, 2026

Criteria version
2.0.0

Report version
1.2.0

Sample report. Example Auto Transport is a fictional company and every figure here is invented. It shows what an AgentReady report contains, not what any business achieved. Estimates in this report are estimates, not results.

Summary for leadership

The top 3 of 6 opportunities, in priority order. Every figure on this page is an estimate, rounded, and none is a result.

1 Reading and extracting from documents: Proof-of-delivery collection and billing packets

ESTIMATE · Strong candidate · 78/100 · high confidence (11 of 11 answers)

Hours freed per year	Labor capacity value per year (not cash)	Payback, in cash
about 630 h to 1,600 h	about $18,000 to $46,000	about 13 months

Cost to implement	Running costs per year	Net cash, first year (includes one-time cost)	Net cash per year after that
about $12,000	about $6,600	about -$600	about $11,000

Assumes: 25% to 65% of handling time saved; no ramp-up entered, so the full rate counts from month one; usable share of freed time not provided. Reviewed and saved by your team.

2 Answering or routing customer inquiries: Shipment status updates to customers

ESTIMATE · Strong candidate · 75/100 · high confidence (11 of 11 answers)

Hours freed per year	Labor capacity value per year (not cash)
about 420 h to 1,000 h	about $11,000 to $27,000

Net cash, first year (includes one-time cost)

Insufficient data. Needs: At least one documented cash expense reduction, Recurring software cost per month, Maintenance cost per month, One-time implementation cost

Assumes: 20% to 50% of handling time saved; no ramp-up entered, so the full rate counts from month one; usable share of freed time not provided. Default planning values, not yet reviewed.

3 Reading and extracting from documents: Carrier invoice audit against rate confirmations

ESTIMATE · Strong candidate · 80/100 · high confidence (11 of 11 answers)

Hours freed per year	Labor capacity value per year (not cash)
about 320 h to 820 h	about $9,500 to $25,000

Net cash, first year (includes one-time cost)

Insufficient data. Needs: At least one documented cash expense reduction, Recurring software cost per month, Maintenance cost per month, One-time implementation cost

Assumes: 25% to 65% of handling time saved; no ramp-up entered, so the full rate counts from month one; usable share of freed time not provided. Default planning values, not yet reviewed.

First step

Agree a baseline measure for "Reading and extracting from documents: Proof-of-delivery collection and billing packets" and record it before changing anything.

Confidence

33 of 33 scored items were answered across these 3 opportunities. Every answer and figure was entered by your organization; AgentReady has not observed the work or verified the numbers.

What is assumed

- Ranges run from the conservative to the optimistic share of handling time saved. They are planning values, not benchmarks and not results.
- Labor capacity is freed time valued at the loaded hourly cost entered. It is not cash, and it is never added to cash.
- Net cash counts only the cash reductions you documented, less the costs entered. The first period carries the whole one-time cost.
- Estimates on this page are rounded to two significant figures. Section 6 shows them exactly, with every input.

01 Company overview

Industry
Transportation and logistics

Company size
11 to 50 people

Locations
2

Systems in use
Transport management system (TMS), Accounting software, Shared email inbox, Spreadsheets, Driver mobile app

AI tools already in use
General chat assistant, used informally

Areas to improve
Operations, Finance and accounting, Customer service, Compliance and risk

Goals
Reduce operating costs, Improve customer experience, Grow without adding headcount, Reduce errors and rework

Biggest operational challenges, in your words
Invoices go out days after delivery because proof-of-delivery photos and signed bills of lading arrive by text, email and the driver app. Dispatchers spend much of the day answering 'where is my vehicle' emails. Carrier invoices are checked by hand against rate confirmations.

Repetitive work you listed

- Collecting delivery paperwork for billing
- Answering shipment status requests
- Checking carrier invoices

02 Assessment scope and methodology

6 workflows were assessed against published criteria on nine dimensions: time savings potential, financial value potential, revenue improvement potential, data availability, implementation complexity, integration requirements, security and compliance risk, time to value, confidence in supporting evidence. Ranked by readiness band, then by expected monthly value where it can be calculated, then by suitability score.

Every answer in this assessment was provided by your organization. AgentReady has not observed your workflows or verified the figures entered.

03 Workflow findings

Workflow	Readiness	Score	Answers given
Proof-of-delivery collection and billing packets Finance and accounting Stated problem: Invoices wait days for paperwork.	Strong candidate	78/100	11 of 11
Shipment status updates to customers Customer service Stated problem: Dispatchers are interrupted all day.	Strong candidate	75/100	11 of 11

Workflow	Readiness	Score	Answers given
Carrier invoice audit against rate confirmations Finance and accounting Stated problem: Overcharges are found late or not at all.	Strong candidate	80/100	11 of 11
Load assignment and dispatch planning Operations Stated problem: Depends on a few experienced dispatchers.	Possible with preparation	62/100	11 of 11
Carrier onboarding document checks Compliance and risk Stated problem: Slow onboarding; fraud risk if rushed.	Possible with preparation	51/100	11 of 11
Weekly operations report for owners Executive reporting Stated problem: Built by hand every Monday.	Not enough information	Not scored	6 of 11

Unanswered questions are reported as missing information, not as negative findings.

04 Prioritized opportunities

Priority 1

Reading and extracting from documents: Proof-of-delivery collection and billing packets

Strong candidate · 78/100 · high confidence (11 of 11 answers)

Priority 2

Answering or routing customer inquiries: Shipment status updates to customers

Strong candidate · 75/100 · high confidence (11 of 11 answers)

Priority 3

Reading and extracting from documents: Carrier invoice audit against rate confirmations

Strong candidate · 80/100 · high confidence (11 of 11 answers)

Priority 4

Scheduling and dispatch: Load assignment and dispatch planning

Possible with preparation · 62/100 · high confidence (11 of 11 answers)

Priority 5

Reading and extracting from documents: Carrier onboarding document checks

Possible with preparation · 51/100 · high confidence (11 of 11 answers)

Priority 6

Recurring reports and summaries: Weekly operations report for owners

Not enough information · not scored · low confidence (6 of 11 answers)

05 Implementation recommendations

Reading and extracting from documents: Proof-of-delivery collection and billing packets

Extract and check fields from incoming documents, with a person reviewing anything uncertain.

Implementation complexity: medium.

1. Measure the baseline (2 weeks)
2. Design and pilot (4 to 6 weeks)
3. Evaluate against the baseline (2 weeks)
4. Roll out and monitor (2 to 4 weeks)

Answering or routing customer inquiries: Shipment status updates to customers

Draft or triage replies to routine inquiries, for staff to approve before sending.

Implementation complexity: medium.

1. Measure the baseline (2 weeks)
2. Design and pilot (4 to 6 weeks)
3. Evaluate against the baseline (2 weeks)
4. Roll out and monitor (2 to 4 weeks)

Reading and extracting from documents: Carrier invoice audit against rate confirmations

Extract and check fields from incoming documents, with a person reviewing anything uncertain.

Implementation complexity: medium.

1. Measure the baseline (2 weeks)
2. Design and pilot (4 to 6 weeks)
3. Evaluate against the baseline (2 weeks)
4. Roll out and monitor (2 to 4 weeks)

Scheduling and dispatch: Load assignment and dispatch planning

Propose schedules or assignments from your rules and availability, for a dispatcher to confirm.

Implementation complexity: medium.

1. Measure the baseline (2 weeks)
2. Design and pilot (4 to 6 weeks)
3. Evaluate against the baseline (2 weeks)
4. Roll out and monitor (2 to 4 weeks)

Reading and extracting from documents: Carrier onboarding document checks

Extract and check fields from incoming documents, with a person reviewing anything uncertain.

Implementation complexity: medium.

1. Measure the baseline (2 weeks)
2. Design and pilot (4 to 6 weeks)
3. Evaluate against the baseline (2 weeks)
4. Roll out and monitor (2 to 4 weeks)

06 Estimated benefits and assumptions

Every figure in this section is an estimate built from the inputs listed with it. Labor capacity is time regained, valued at cost; it is not cash, and it is never added to cash. Missing inputs are reported as insufficient data. Figures here are exact, so the arithmetic can be checked; the summary page rounds them.

Reading and extracting from documents: Proof-of-delivery collection and billing packets [ESTIMATE]

Assumptions reviewed and saved by your team.

Hours freed per year (expected)
1,134 h

Labor capacity value per year (not cash)
$31,752

Net cash, first year (includes one-time cost)
-$600

Net cash per year after that
$11,400

Payback
12.6 months

Assumptions

Input	Value
Task volume per month	1,400
Minutes per task	9
Loaded hourly cost	$28.00
Expected reduction in handling time	25% conservative, 45% expected, 65% optimistic
One-time implementation cost	$12,000.00
Recurring software cost per month	$400.00
Maintenance cost per month	$150.00
Usable share of freed time	Not provided
Months to reach the full rate	Not provided
Documented cash reductions	Temporary billing clerk through an agency ($1,500.00 per month; basis: The agency contract is month to month and would end once packets are assembled automatically.)

Answering or routing customer inquiries: Shipment status updates to customers [ESTIMATE]

Default assumptions from the assessment answers; not yet reviewed.

Hours freed per year (expected)
728 h

Labor capacity value per year (not cash)
$18,928

Net cash, first year (includes one-time cost)

Insufficient data

Needs: At least one documented cash expense reduction, Recurring software cost per month, Maintenance cost per month, One-time implementation cost

Payback

Insufficient data

Needs: At least one documented cash expense reduction, Recurring software cost per month, Maintenance cost per month, One-time implementation cost

Assumptions

Input	Value
Task volume per month	2,600
Minutes per task	4
Loaded hourly cost	$26.00
Expected reduction in handling time	20% conservative, 35% expected, 50% optimistic

Input	Value
One-time implementation cost	Not provided
Recurring software cost per month	Not provided
Maintenance cost per month	Not provided
Usable share of freed time	Not provided
Months to reach the full rate	Not provided
Documented cash reductions	Not provided

Reading and extracting from documents: Carrier invoice audit against rate confirmations [ESTIMATE]

Default assumptions from the assessment answers; not yet reviewed.

Hours freed per year (expected)
567 h

Labor capacity value per year (not cash)
$17,010

Net cash, first year (includes one-time cost)
Insufficient data
Needs: At least one documented cash expense reduction, Recurring software cost per month, Maintenance cost per month, One-time implementation cost

Payback
Insufficient data
Needs: At least one documented cash expense reduction, Recurring software cost per month, Maintenance cost per month, One-time implementation cost

Assumptions

Input	Value
Task volume per month	900
Minutes per task	7
Loaded hourly cost	$30.00
Expected reduction in handling time	25% conservative, 45% expected, 65% optimistic
One-time implementation cost	Not provided
Recurring software cost per month	Not provided
Maintenance cost per month	Not provided
Usable share of freed time	Not provided
Months to reach the full rate	Not provided
Documented cash reductions	Not provided

Scheduling and dispatch: Load assignment and dispatch planning [ESTIMATE]

Default assumptions from the assessment answers; not yet reviewed.

Hours freed per year (expected)
1,008 h

Labor capacity value per year (not cash)
$34,272

Net cash, first year (includes one-time cost)

Insufficient data

Needs: At least one documented cash expense reduction, Recurring software cost per month, Maintenance cost per month, One-time implementation cost

Payback

Insufficient data

Needs: At least one documented cash expense reduction, Recurring software cost per month, Maintenance cost per month, One-time implementation cost

Assumptions

Input	Value
Task volume per month	1,400
Minutes per task	12
Loaded hourly cost	$34.00
Expected reduction in handling time	15% conservative, 30% expected, 45% optimistic
One-time implementation cost	Not provided
Recurring software cost per month	Not provided
Maintenance cost per month	Not provided
Usable share of freed time	Not provided
Months to reach the full rate	Not provided
Documented cash reductions	Not provided

Reading and extracting from documents: Carrier onboarding document checks [ESTIMATE]

Default assumptions from the assessment answers; not yet reviewed.

Hours freed per year (expected)

141.75 h

Labor capacity value per year (not cash)

$4,536

Net cash, first year (includes one-time cost)

Insufficient data

Needs: At least one documented cash expense reduction, Recurring software cost per month, Maintenance cost per month, One-time implementation cost

Payback

Insufficient data

Needs: At least one documented cash expense reduction, Recurring software cost per month, Maintenance cost per month, One-time implementation cost

Assumptions

Input	Value
Task volume per month	45
Minutes per task	35
Loaded hourly cost	$32.00
Expected reduction in handling time	25% conservative, 45% expected, 65% optimistic
One-time implementation cost	Not provided
Recurring software cost per month	Not provided
Maintenance cost per month	Not provided
Usable share of freed time	Not provided
Months to reach the full rate	Not provided

Input	Value
Documented cash reductions	Not provided

Recurring reports and summaries: Weekly operations report for owners [ESTIMATE]

Default assumptions from the assessment answers; not yet reviewed.

Hours freed per year (expected)

Insufficient data

Needs: Minutes per task

Labor capacity value per year (not cash)

Insufficient data

Needs: Minutes per task

Net cash, first year (includes one-time cost)

Insufficient data

Needs: At least one documented cash expense reduction, Recurring software cost per month, Maintenance cost per month, One-time implementation cost

Payback

Insufficient data

Needs: At least one documented cash expense reduction, Recurring software cost per month, Maintenance cost per month, One-time implementation cost

Assumptions

Input	Value
Task volume per month	4
Minutes per task	Not provided
Loaded hourly cost	$38.00
Expected reduction in handling time	25% conservative, 45% expected, 60% optimistic
One-time implementation cost	Not provided
Recurring software cost per month	Not provided
Maintenance cost per month	Not provided
Usable share of freed time	Not provided
Months to reach the full rate	Not provided
Documented cash reductions	Not provided

07 Financial impact classification

Three kinds of figure, never mixed: estimated (section 6, before work starts), realized (results your team recorded) and verified (results approved by a second person, with evidence).

Project	Cash savings [REALIZED]	Cash savings [VERIFIED]	Net benefit to date [VERIFIED]
Billing packet pilot Reading and extracting from documents: Proof-of-delivery collection and billing packets	$1,500.00	$1,500.00	-$11,050.00

Net benefit to date is verified cash savings less every approved cost for the same periods, including the one-time cost of setting up. Early in a project it is usually negative, because the savings recorded so far are set against the whole implementation cost.

08 Risks, prerequisites and limitations

Prerequisites

- Agree on one place where this work's information is kept.
- Write down the decision rules experienced staff follow, with examples.
- Separate routine items from exceptions, and automate only the routine ones.
- Keep a person approving every item, and log each decision.
- Map every system involved and who owns each connection.
- Get the inputs into a digital system before automating this work.
- Confirm any vendor meets your legal obligations for this data before sharing it, and get the terms in writing.
- Measure how many items arrive each month and how long each takes.
- Answer: How often does an item need special handling?
- Answer: Where does the information live?
- Answer: How many systems would a solution need to work with?

Industry cautions

- Federal and state transportation rules apply to carriers, brokers and drivers. Keep a qualified person responsible for compliance decisions.
- Driver files and carrier documents contain personal information. Limit who and what can access them, and check vendor terms before sharing them.
- Fraud such as identity theft and double brokering targets carrier onboarding. Verify carrier identity through your established process, never from an automated message alone.
- Customer contracts may restrict how shipment data is shared. Check them before connecting any AI vendor.

Not suitable for automation

- Tendering, accepting or booking loads without a person approving
- Safety-critical or hours-of-service decisions
- Signing rate confirmations or paying carriers automatically
- Approving a carrier without your established identity checks

Limitations of this assessment

- This assessment is based on the answers you provided. AgentReady has not observed or verified your workflows.
- Suitability scores rank opportunities against each other. They are not predictions of success.
- Time-saved shares are planning assumptions to discuss and replace with your own estimates. They are not benchmarks or guarantees.
- Costs depend on the solution you choose, so we do not estimate them. Payback appears only once you enter them.
- Measured results come only from the baseline and result measurements you record in a project.

09 30/60/90-day action plan

DAYS 1-30

Measure the baseline

Reading and extracting from documents: Proof-of-delivery collection and billing packets

2 weeks. Record volume, time per item and error rate as the work runs today.

Design and pilot

Reading and extracting from documents: Proof-of-delivery collection and billing packets

4 to 6 weeks. Choose a tool or partner, and agree what the pilot will and will not handle.

Measure the baseline

Answering or routing customer inquiries: Shipment status updates to customers

2 weeks. Record volume, time per item and error rate as the work runs today.

Complete the missing information

Recurring reports and summaries: Weekly operations report for owners

Answer the open assessment questions so this opportunity can be scored.

DAYS 31-60

Evaluate against the baseline

Reading and extracting from documents: Proof-of-delivery collection and billing packets

2 weeks. Measure the same metric the same way, and record the result.

Design and pilot

Answering or routing customer inquiries: Shipment status updates to customers

4 to 6 weeks. Choose a tool or partner, and agree what the pilot will and will not handle.

DAYS 61-90

Roll out and monitor

Reading and extracting from documents: Proof-of-delivery collection and billing packets

2 to 4 weeks. Extend to all items, keep review where risk requires it, and re-measure monthly.

Evaluate against the baseline

Answering or routing customer inquiries: Shipment status updates to customers

2 weeks. Measure the same metric the same way, and record the result.

Roll out and monitor

Answering or routing customer inquiries: Shipment status updates to customers

2 to 4 weeks. Extend to all items, keep review where risk requires it, and re-measure monthly.

Proposed. Timing uses the upper end of each phase's estimate; phases that start after day 90 are not shown.

10 Recommended next steps

1. Agree a baseline measure for "Reading and extracting from documents: Proof-of-delivery collection and billing packets" and record it before changing anything.
2. Complete the missing assessment answers, then re-run the assessment.
3. Start a project in AgentReady for the first opportunity, so milestones and results are recorded in one place.
4. Record results in the value ledger, and have a second person approve them so they count as verified.