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Synthetic sample. "Fernhill Supply Co." is a fictional company and every number below is invented. This page shows the format and depth of a real Workflow Audit deliverable. It is not a client case study, and it makes no claim about outcomes for any real business.

Sample Workflow Audit Report: purchase-order intake

What you get at the end of a fixed-scope Workflow Audit: a map of the current workflow, ranked findings, automation candidates with clear human-review points, and a scoped 2-week sprint you can approve or ignore.

CLIENT (FICTIONAL)	WORKFLOW IN SCOPE	FORMAT
Fernhill Supply Co., B2B industrial parts distributor, ~40 staff	Inbound purchase orders, email to ERP order	Fixed-scope audit, read-only access, written report + walkthrough call

OUTPUT
Findings, automation candidates, sprint proposal

1. Executive summary

Fernhill's sales-ops team re-keys purchase orders (POs) from customer emails into the ERP by hand. In the sample week reviewed (invented data), the team handled 312 POs at a median of 7 minutes each, with 4.5% needing a correction after entry. The biggest cost is not typing time. It is the 1 to 2 day lag before an order is confirmed, and the silent errors that reach the warehouse.

Recommendation: do not start with "AI reads every PO". Start with a narrow, traceable pipeline: capture every PO email in one queue, extract the 9 fields the ERP needs, and route anything below a confidence threshold to a person. Expected first-

sprint scope: one customer segment (the top 20 accounts by PO volume) and no ERP write access until a human approves.

2. Scope and method

- Read-only access to the shared PO inbox export (1 week, anonymized), the ERP order-entry screen, and the team's correction log.
- Two 45-minute shadowing sessions with sales-ops staff.
- No production changes. No customer data leaves the client's environment.
- Out of scope: pricing logic, credit checks, warehouse picking.

3. Current workflow map

1. Customer emails a PO (PDF 71%, inline text 22%, spreadsheet 7%) to a shared inbox.
2. A team member opens the email, finds the customer in the ERP, and creates a draft order.
3. Line items are typed from the PO, with SKUs looked up when customers use their own part numbers.
4. The order is saved, and a confirmation is sent manually from a template.
5. Errors are caught later by the warehouse or the customer and fixed in a correction log.

4. Findings

#	FINDING	SEVERITY	EVIDENCE (SYNTHETIC)	EFFORT TO FIX
F1	No single queue: POs arrive in 3 inboxes and a forwarding rule	High	9% of POs first answered after more than 24h	0.5 day
F2	Customer part numbers mapped to SKUs from memory	High	61% of corrections were SKU mismatches	2 days

#	FINDING	SEVERITY	EVIDENCE (SYNTHETIC)	EFFORT TO FIX
F3	No record of who entered or changed an order line	Medium	Correction log has no link to the original email	1 day
F4	Confirmation emails sent by hand from a template	Medium	Median confirmation lag: 26 hours	1 day
F5	Spreadsheet POs pasted cell by cell	Low	7% of volume, 2x median handling time	0.5 day

5. Automation candidates and human-review points

CANDIDATE	WHAT RUNS AUTOMATICALLY	WHERE A PERSON DECIDES	RISK IF WRONG
Single PO queue	Route all PO emails to one queue with a status per PO	None needed	Low
Field extraction	Extract customer, PO number, dates, lines, quantities	Any PO with a field below the confidence threshold	Medium: wrong quantity
Part-number mapping	Suggest SKU from a per-customer mapping table	New or ambiguous part numbers, always	High: wrong item shipped
Draft order + confirmation	Create a draft order and a draft confirmation	A person approves before the ERP order is final	Medium

Every automated step writes an audit-trail entry (source email, extracted values, model and rule version, reviewer, timestamp), so any order can be traced back to the email it came from.

6. Quick wins (no code)

- Merge the three inboxes into one shared queue with a "PO" label (F1).

- Start a shared customer-part-number to SKU sheet for the top 20 accounts (F2). It becomes the seed data for the mapping table.
- Add the email link to every correction-log entry (F3).

7. Proposed 2-week sprint

WEEK	DELIVERABLE	DONE WHEN
1	PO queue, extraction for PDF and inline POs, review screen, audit trail	All POs from the top 20 accounts land in the queue with extracted fields shown next to the source
2	SKU suggestions from the mapping table, draft orders, draft confirmations, runbook and handoff	The team approves drafts instead of typing them, and every approval is logged

Success measure to agree up front: median time from PO received to confirmation sent, and the correction rate, both measured on the same top-20 segment before and after.

8. Risks and open questions

- Customer PO formats change without notice. Mitigation: low-confidence routing, plus a weekly review of rejected extractions.
- ERP API access may need vendor approval. Mitigation: sprint writes drafts only, a person enters the final order.
- Data handling: PO emails contain customer contact details. Processing stays inside the client's cloud account.

Run this on your own workflow

The real audit follows the same structure on one workflow of yours, with read-only access and a walkthrough call at the end. See services and pricing, or book a 30-minute discovery call.

Bogdan Veliscu, EU-based lead Python engineer. This report is a synthetic sample: fictional company, invented data.