WADE ADVISORY · SAMPLE REPORT

AI Efficiency Audit Report

Prepared for: Sample Trading Ltd (anonymised)   Sector: Wholesale & distribution   Staff: 8   Ref: WA-SAMPLE

This is an example report, based on a typical Mauritian trading company. Names and figures have been changed. Your own report follows exactly this format.

Summary

Sample Trading is an eight-person wholesale business selling to retailers across the island. We reviewed six areas of the company over one week, with a 90-minute interview with the managing director.

We found 12 hours a week of recoverable time — a full working day and a half, every week, spent on tasks that repeat in exactly the same way. The single most valuable change is automating invoice reminders: it costs Rs 18,000 to set up, saves 4.5 hours a week, and pays for itself in two months. We recommend starting there.

Findings at a glance

Ranked by payback — fastest return first.

Ref	Finding	Hrs/week	Payback
F-01	Invoices chased by phone, one at a time	4.5	2 months
F-02	The same customer questions answered again and again	3.0	1 month
F-03	Quotes written from scratch every time	2.0	3 months
F-04	Monthly figures retyped into a spreadsheet	1.5	2 months
F-05	Supplier orders followed up manually	1.0	4 months
TOTAL	**Recoverable time across all findings**	12.0 hrs	

F-01 — Invoices chased by phone, one at a time

What we found

The company issues around 30 invoices a month on 30-day terms. Nobody is assigned to follow up. When cash gets tight, the managing director works through the list by phone, usually in the evening. In his words: “we just call them until they pay.” Roughly 4.5 hours a week, and follow-up is inconsistent — some customers are never chased at all.

What it costs you now

4.5 hours a week of the owner's time, plus late cash. Two customers were more than 90 days overdue at the time of the audit, together holding Rs 240,000 that had not been formally chased in writing.

The fix

An automated reminder system linked to your invoicing: every customer gets a polite, professional message a few days before the due date, on the due date, and at set intervals afterwards — by email and WhatsApp, without anyone remembering to send it. You are alerted only when an account needs a real conversation.

Setup cost	Hours saved / week	Payback period
Rs 18,000	**4.5 hrs**	2 months

F-02 — The same customer questions answered again and again

What we found

Customers order and enquire mainly on WhatsApp. Two staff members answer, and the majority of messages are the same handful of questions: is this item in stock, what is the price, when do you deliver, where are you located.

What it costs you now

About 3 hours a week across two people, and slower replies during busy periods — messages received after 4pm are often answered the next morning.

The fix

A WhatsApp assistant that answers your twenty most common questions instantly, day or night, in the wording you approve. Anything it cannot answer is passed straight to your team, with the conversation already started.

Setup cost	Hours saved / week	Payback period
Rs 12,000	**3 hrs**	1 month

F-03 — Quotes written from scratch every time

What we found

Each quotation is typed fresh in Word, with prices looked up manually. Turnaround is one to two days, and the sales team believes slow quotes have cost them business.

What it costs you now

Around 2 hours a week, plus lost deals — a competitor quoting the same day usually wins.

The fix

A quote template that drafts itself from your price list: you enter the customer and the items, and a complete, correctly-priced quotation is ready to review and send in minutes.

Setup cost	Hours saved / week	Payback period
Rs 22,000	**2 hrs**	3 months

F-04 — Monthly figures retyped into a spreadsheet

What we found

At the start of each month, sales figures are copied by hand from invoices into a spreadsheet to produce a summary for the directors. Two typing errors were found in the last three months of reports.

What it costs you now

Around 6 hours a month, and decisions occasionally made on figures that were slightly wrong.

The fix

An automatic export from your invoicing into the same summary you already use. The report builds itself, on the same day each month, with no retyping.

Setup cost	Hours saved / week	Payback period
Rs 15,000	**1.5 hrs**	2 months

F-05 — Supplier orders followed up manually

What we found

Orders to overseas suppliers are placed by email and tracked in one person's head. Delivery dates are chased ad hoc, and stock has twice run out on fast-moving lines because a reorder was placed late.

What it costs you now

About 1 hour a week, plus lost sales when a popular line is unavailable.

The fix

A simple reorder alert: when stock on a tracked line falls below the level you set, you get a notification with the supplier and the usual order quantity ready to send.

Setup cost	Hours saved / week	Payback period
Rs 16,000	**1 hr**	4 months

What we looked at and left alone

Not everything should be automated. We reviewed these and recommend no change:

- Pricing decisions — these depend on relationships and volume history that only your team understands. Judgment, not a rule.
- Customer complaints — every one we reviewed was different. These need a person, and your customers value that.
- Marketing — currently minimal, and we do not recommend adding tools here until the time savings above are actually realised.

Recommended next step

Start with F-01. It is the largest single time saving, it improves your cash position directly, and it pays for itself in two months. F-02 can follow immediately afterwards — together they recover 7.5 hours a week for a combined setup cost of Rs 30,000.

We can implement either fix at the fixed prices shown above, or you are free to arrange it yourself — the report is yours either way.

Questions? We walk through every finding together in your included 30-minute call.