PRISM PROFILES
Map Your Business

IMPLEMENTATION SIGN-OFF PACK

Meridian Industrial Group: PRISM results and implementation plan

Prepared for Daniel Okafor · 11 November 2026

564	A$551,950	6	18
working days back a year	value a year	people	workflows mapped

Sample report. Meridian Industrial Group and its people are fictional. Figures are illustrative.

How to read this pack

Three levels, one page per person, and two choices for you to make

The three implementation levels

Low complexity

Uses tools the team has or can switch on quickly. Little or no connection work between systems.

EFFORT / WORKFLOW
8–16 h
TIME TO GO LIVE
about 1 week
DELIVERED BY
Junior developer

Moderate complexity

Needs set-up, a connection between two systems, or a few weeks of change for the team.

EFFORT / WORKFLOW
24–40 h
TIME TO GO LIVE
about 2 weeks
DELIVERED BY
Intermediate developer

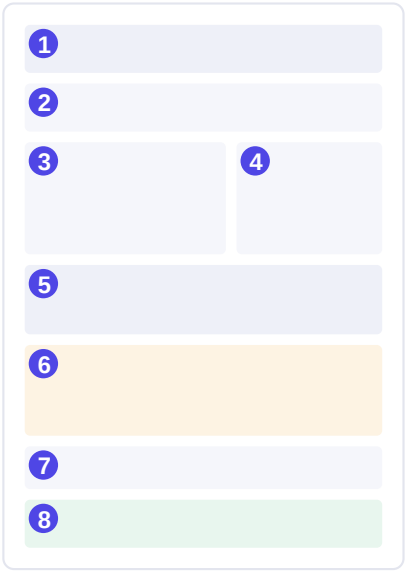
High complexity

Several systems, specialist judgement or data clean-up first. Gets a detailed delivery estimate before work starts.

EFFORT / WORKFLOW
60–200 h
TIME TO GO LIVE
3 weeks to 2 months
DELIVERED BY
Senior developer

Each person's level is set by their recommended first step. Time to go live assumes one developer at about 20 hours a week, and several people can be worked on at once. We recommend planning on the upper end of each range, as system access, data and team availability can add time. Roll-out and training add 4–8 h per person.

What is on each person's page



1. **Who they are**
   Name, role and department, with their implementation level.
2. **Time and value back**
   Hours and working days a year, and what that time is worth.
3. **Workflows mapped**
   Each workflow they entered, its hours back and its own level.
4. **Tech stack today**
   The tools they already use: the starting point for any build.
5. **How it fits**
   Today's tools, the recommended tool, and the time it gives back.
6. **Recommended next move**
   The first workflow to fix and why its tool fits.
7. **Effort and budget**
   Estimated build hours for all their workflows, time to go live and the price for their level.
8. **Your decision**
   Tick a Company priority (Low / Medium / High) and whether to start with this person.

Two choices for you

- ☐ **Company priority on every person page**
  Low, Medium or High: how important this person's work is to the business right now, whatever its level.
- ☐ **Choose where to start (near the end)**
  Tick the people, and their workflows, you would like in the first round. The totals on that page add up your selection against your budget.

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Contents

Everyone in this pack, from the leadership team down

How to read this pack		2
Introduction		4
The opportunity at a glance		5
Leadership · 1 person · 520 h a year		6
Daniel Okafor	Moderate	6
Product / Service Management · 2 people · 1,646 h a year		7
Dr. Arjun Mehta	Moderate	7
Charlotte Evans	Moderate	8
Sales · 2 people · 1,411 h a year		9
Liam Carter	Low	9
Raj Patel	Low	10
Operations & Supply Chain · 1 person · 938 h a year		11
James O'Brien	High	11
Implementation ranking		12
Choose where to start		13
Summary of everyone		14
What we assumed		15
Investment and sign-off		16

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Introduction

PRISM results for Meridian Industrial Group

Thank you. Over the past weeks, 6 people at Meridian Industrial Group sat down and mapped the work they do every week: 18 workflows, step by step, with the time each one takes. That is a real ask on top of a full workload, and it is the reason this pack can be specific about every person rather than general about the business.

PRISM analysed each workflow and found where AI and better tools can take time out of it. Together, the workflows mapped so far could give back about 4,515 hours a year, around 564 working days, worth about A$551,950 a year at each person's rate.

This pack turns those findings into a plan you can approve: one page per person, from the leadership team down, then a page to choose where to start and a summary of everything.

6
People who mapped their work

18
Workflows mapped

18
Analysed and in the plan

What happens next

1. Choose
Mark a Company priority on each person page and tick where to start.

2. Confirm
Your partner confirms prices and dates for your selection.

3. Build
Low-complexity items go live first, often within weeks; moderate and high complexity follow in order.

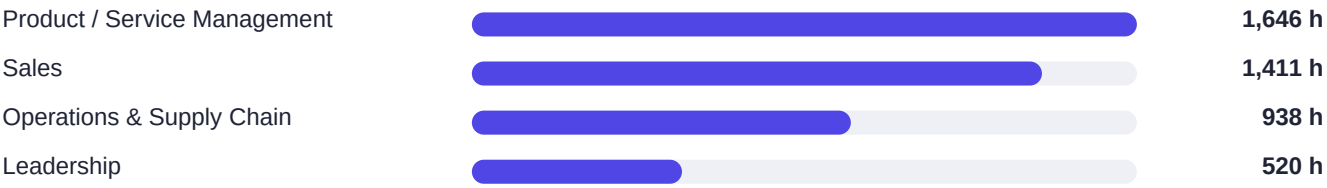
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The opportunity at a glance

6 people with analysed workflows

18	4,515	564	A$551,950
Workflows mapped	Hours back a year	Working days a year	Value a year

Hours back a year, by department



People by implementation level



LEVEL	DELIVERED BY	PEOPLE	PRICE PER PERSON	SUBTOTAL
Low complexity	Junior developer	2	To be confirmed	n/a
Moderate complexity	Intermediate developer	3	To be confirmed	n/a
High complexity	Senior developer	1	To be confirmed	n/a
Everyone		**6**		**To be confirmed**

Estimated build effort for everyone: 508–852 h. Prices per level are confirmed by your partner.

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SAMPLE

Daniel Okafor

Managing Director · Leadership

Moderate complexity

Intermediate developer

520	65	A$104,000
Hours back a year	Working days a year	Value a year

WORKFLOWS MAPPED (3)

Monthly board pack preparation	221 h
Major tender go/no-go decisions	195 h
Lender and shareholder reporting	104 h

TECH STACK TODAY

Microsoft 365 · Outlook · Excel · Teams · SharePoint

HOW IT FITS

TODAY
Microsoft 365, Outlook, Excel

→

RECOMMENDED
Claude, Azure AI Document Intelligence

→

RESULT
195 hours a year back on "Major tender go/no-go decisions"

Recommended next move: Major tender go/no-go decisions

Claude is a strong fit for major tender go/no-go decisions because drafting, summarisation and document analysis.

The full step-by-step guide is in PRISM: open Ai Roadmap and choose this workflow.

EFFORT AND BUDGET

Build effort, all workflows	Time to go live (first step)	Budget for this person
72–120 h	**about 2 weeks**	**To be confirmed**

IMPLEMENTATION PATH

Set up	First step live	Other workflows (2)	Roll-out
1 week	2 weeks	4 weeks	1 week

About 8 weeks from approval until everything is live, with one developer working about 20 hours a week. Working on several people at once shortens the overall programme.

YOUR DECISION

Company priority ☐ Low ☐ Medium ☐ High ☐ **Start with this person**

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Dr. Arjun Mehta

Engineering Manager · Product / Service Management

Moderate complexity

Intermediate developer

553	69	A$77,420
Hours back a year	Working days a year	Value a year

WORKFLOWS MAPPED (3)

Design review	280 h
Engineering knowledge capture	169 h
New product development	104 h

TECH STACK TODAY

SolidWorks · Autodesk Vault · Jira · Excel

HOW IT FITS

TODAY
SolidWorks, Autodesk Vault, Jira

→

RECOMMENDED
Autodesk Fusion (Generative Design), Claude

→

RESULT
280 hours a year back on "Design review"

Recommended next move: Design review

Autodesk Fusion (Generative Design) is a strong fit for design review because ai-assisted cad geometry and design variants.

The full step-by-step guide is in PRISM: open Ai Roadmap and choose this workflow.

EFFORT AND BUDGET

Build effort, all workflows	Time to go live (first step)	Budget for this person
72–120 h	**about 2 weeks**	**To be confirmed**

IMPLEMENTATION PATH



Set up	First step live	Other workflows (2)	Roll-out
1 week	2 weeks	4 weeks	1 week

About 8 weeks from approval until everything is live, with one developer working about 20 hours a week. Working on several people at once shortens the overall programme.

YOUR DECISION

Company priority ☐ Low ☐ Medium ☐ High ☐ **Start with this person**

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SAMPLE

Charlotte Evans

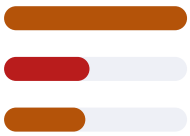
Design Engineer · Product / Service Management

Moderate complexity

Intermediate developer

1,093	137	A$103,835
Hours back a year	Working days a year	Value a year

WORKFLOWS MAPPED (3)



TECH STACK TODAY

SolidWorks · Autodesk Vault · SharePoint · Teams

HOW IT FITS

TODAY
SolidWorks, Autodesk Vault, SharePoint

→

RECOMMENDED
Autodesk Fusion (Generative Design), Microsoft 365 Copilot

→

RESULT
572 hours a year back on "CAD modelling"

Recommended next move: CAD modelling

Autodesk Fusion (Generative Design) is a strong fit for cad modelling because ai-assisted cad geometry and design variants.

The full step-by-step guide is in PRISM: open Ai Roadmap and choose this workflow.

EFFORT AND BUDGET

Build effort, all workflows	Time to go live (first step)	Budget for this person
108–180 h	**about 2 weeks**	**To be confirmed**

IMPLEMENTATION PATH



Set up	First step live	Other workflows (2)	Roll-out
1 week	2 weeks	6 weeks	1 week

About 10 weeks from approval until everything is live, with one developer working about 20 hours a week. Working on several people at once shortens the overall programme.

YOUR DECISION

Company priority ☐ Low ☐ Medium ☐ High ☐ **Start with this person**

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SAMPLE

Liam Carter

Sales Director · Sales

Low complexity

Junior developer

306	38	A$39,780
Hours back a year	Working days a year	Value a year

WORKFLOWS MAPPED (3)

Tender and bid responses		134 h
Key account planning		87 h
Sales pipeline review		85 h

TECH STACK TODAY

HubSpot · Outlook · Excel · LinkedIn Sales Navigator

HOW IT FITS

TODAY
HubSpot, Outlook, Excel

→

RECOMMENDED
HubSpot AI, Claude

→

RESULT
87 hours a year back on "Key account planning"

Recommended next move: Key account planning

HubSpot AI is a strong fit for key account planning because crm automation, lead scoring and outreach.

The full step-by-step guide is in PRISM: open Ai Roadmap and choose this workflow.

EFFORT AND BUDGET

Build effort, all workflows	Time to go live (first step)	Budget for this person
56–96 h	**about 1 week**	**To be confirmed**

IMPLEMENTATION PATH



Set up	First step live	Other workflows (2)	Roll-out
1 week	1 week	4 weeks	1 week

About 7 weeks from approval until everything is live, with one developer working about 20 hours a week. Working on several people at once shortens the overall programme.

YOUR DECISION

Company priority ☐ Low ☐ Medium ☐ High ☐ **Start with this person**

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SAMPLE

Raj Patel

Sales Engineer · Sales

Low complexity

Junior developer

1,105	138	A$104,975
Hours back a year	Working days a year	Value a year

WORKFLOWS MAPPED (3)

Technical quote estimating	572 h
Customer technical support	286 h
Proposal technical sections	247 h

TECH STACK TODAY

HubSpot · SolidWorks · Excel · Teams

HOW IT FITS

TODAY
HubSpot, SolidWorks, Excel

→

RECOMMENDED
Claude, Intercom Fin

→

RESULT
286 hours a year back on "Customer technical support"

Recommended next move: Customer technical support

Claude is a strong fit for customer technical support because drafting, summarisation and document analysis.

The full step-by-step guide is in PRISM: open Ai Roadmap and choose this workflow.

EFFORT AND BUDGET

Build effort, all workflows	Time to go live (first step)	Budget for this person
56–96 h	**about 1 week**	**To be confirmed**

IMPLEMENTATION PATH



Set up	First step live	Other workflows (2)	Roll-out
1 week	1 week	4 weeks	1 week

About 7 weeks from approval until everything is live, with one developer working about 20 hours a week. Working on several people at once shortens the overall programme.

YOUR DECISION

Company priority ☐ Low ☐ Medium ☐ High ☐ **Start with this person**

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SAMPLE

James O'Brien

Operations Manager · Operations & Supply Chain

High complexity

Senior developer

938	117	A$121,940
Hours back a year	Working days a year	Value a year

WORKFLOWS MAPPED (3)

Production scheduling	585 h
Daily production meeting prep	271 h
Capacity planning	82 h

TECH STACK TODAY

NetSuite · Excel · Microsoft Teams · Power BI

HOW IT FITS

TODAY
NetSuite, Excel, Microsoft Teams

→

RECOMMENDED
NetSuite AI, Power BI Copilot

→

RESULT
585 hours a year back on "Production scheduling"

Recommended next move: Production scheduling

NetSuite AI is a strong fit for production scheduling because erp automation for orders, inventory and finance.

The full step-by-step guide is in PRISM: open Ai Roadmap and choose this workflow.

EFFORT AND BUDGET

Build effort, all workflows	Time to go live (first step)	Budget for this person
144–240 h	**3 weeks to 2 months**	**To be confirmed**

IMPLEMENTATION PATH

Set up	First step live	Other workflows (2)	Roll-out
1 week	7 weeks	4 weeks	1 week

About 13 weeks from approval until everything is live, with one developer working about 20 hours a week. Working on several people at once shortens the overall programme.

YOUR DECISION

Company priority ☐ Low ☐ Medium ☐ High ☐ **Start with this person**

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Implementation ranking

Lowest complexity first, then most hours back

#	NAME	DEPARTMENT	LEVEL	HOURS / YR	BUDGET
1	**Raj Patel**	Sales	**Low**	1,105	TBC
2	**Liam Carter**	Sales	**Low**	306	TBC
3	**Charlotte Evans**	Product / Service Management	**Moderate**	1,093	TBC
4	**Dr. Arjun Mehta**	Product / Service Management	**Moderate**	553	TBC
5	**Daniel Okafor**	Leadership	**Moderate**	520	TBC
6	**James O'Brien**	Operations & Supply Chain	**High**	938	TBC

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Choose where to start

Tick the people, and the workflows for each person, for the first round

People are listed lowest complexity first. Ticking a person includes their recommended next move; tick any of their other workflows to add those too. Write your totals in the box below, and your partner will confirm the price of your selection.

People selected	Workflows selected	Selected budget

PERSON / WORKFLOW	LEVEL	HOURS / YR	BUDGET
☐ **Raj Patel**	**Low**	**1,105**	**TBC**
☐ Technical quote estimating	Moderate	572	
☐ Customer technical support (next move)	Low	286	
☐ Proposal technical sections	Moderate	247	
☐ **Liam Carter**	**Low**	**306**	**TBC**
☐ Tender and bid responses	Moderate	134	
☐ Key account planning (next move)	Low	87	
☐ Sales pipeline review	Moderate	85	
☐ **Charlotte Evans**	**Moderate**	**1,093**	**TBC**
☐ CAD modelling (next move)	Moderate	572	
☐ Engineering change orders	High	267	
☐ Technical documentation	Moderate	254	
☐ **Dr. Arjun Mehta**	**Moderate**	**553**	**TBC**
☐ Design review (next move)	Moderate	280	
☐ Engineering knowledge capture	Moderate	169	
☐ New product development	Moderate	104	
☐ **Daniel Okafor**	**Moderate**	**520**	**TBC**
☐ Monthly board pack preparation	Moderate	221	
☐ Major tender go/no-go decisions (next move)	Moderate	195	
☐ Lender and shareholder reporting	Moderate	104	
☐ **James O'Brien**	**High**	**938**	**TBC**
☐ Production scheduling (next move)	High	585	
☐ Daily production meeting prep	Moderate	271	
☐ Capacity planning	High	82	

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Summary of everyone

In the order of this pack. Wf = workflows; hours and working days back a year

NAME	DEPARTMENT	WF	HOURS	DAYS	VALUE / YR	LEVEL	BUDGET
Daniel Okafor	Leadership	3	520	65	A$104,000	**Moderate**	TBC
Dr. Arjun Mehta	Product / Service Management	3	553	69	A$77,420	**Moderate**	TBC
Charlotte Evans	Product / Service Management	3	1,093	137	A$103,835	**Moderate**	TBC
Liam Carter	Sales	3	306	38	A$39,780	**Low**	TBC
Raj Patel	Sales	3	1,105	138	A$104,975	**Low**	TBC
James O'Brien	Operations & Supply Chain	3	938	117	A$121,940	**High**	TBC
Total		**18**	**4,515**	**564**	**A$551,950**		**TBC**

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What we assumed

And how to make this plan sharper

Where information has not been entered yet, this pack uses a standard assumption so every figure can be shown. None of them stop you approving a first round, fixing them makes the numbers sharper. Each item says who can fix it; the plan is regenerated after the changes.

How the plan is built

ASSUMPTION	USED IN THIS PACK
Delivery rate per build hour (blended)	A$150
Contingency on build cost	15%
Delivery team	40 build hours a week (about 1 builder)
Start and planned finish	16 Nov 2026 to 12 Mar 2027
Effort figure used for the schedule	Mid-point of each estimate
No build work during	None
Price per person, by level	Low (junior developer) TBC · Moderate (intermediate developer) TBC · High (senior developer) TBC

To change any of these: your partner updates the plan settings with you.

Pay rates, 0 people use the standard rate

Rates used in this plan: own rate (6 people).

Everyone in the plan is on a named rate or has their own rate set.

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Investment and sign-off

Meridian Industrial Group

IF YOU DO EVERYTHING	
People in the plan	6
Workflows in the plan	18
Hours back a year	4,515
Working days back a year	564
Value a year	A$551,950
Estimated build effort	508–852 h
Low complexity (junior developer): 2 people × To be confirmed	TBC
Moderate complexity (intermediate developer): 3 people × To be confirmed	TBC
High complexity (senior developer): 1 people × To be confirmed	TBC
Total investment	**To be confirmed**
Payback	n/a

Your selection for the first round

People selected	Workflows selected	Approved budget
_____	_____	_____

By signing, Meridian Industrial Group approves the first round selected in this pack. Moderate- and high-complexity items get a detailed delivery estimate before work on them begins.

_____ _____

Approved by: Daniel Okafor, Meridian Industrial Group — Date

_____ _____

Prepared by: Your partner — Date

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IMPORTANT

All figures in this report, including any "potential" hours saved, cost savings, or efficiency gains, are predictive estimates only, generated from the data provided and a generalised efficiency model. They are not a guarantee, warranty, or forecast of actual results, and must not be relied upon for financial planning, investor reporting, or contractual commitments. Actual outcomes depend entirely on your organisation's execution, employee adoption, data accuracy, and other factors outside AI Tech Advisory's control. All decisions on staffing, budget, procurement, or workflow change must be independently vetted by your leadership, financial advisors, and legal counsel before implementation. By relying on this report you accept the Prism Terms of Use: AI Tech Advisory, its founders, directors, employees, and affiliates accept no legal or financial responsibility if the projected savings or efficiencies do not eventuate, in whole or in part. Nothing herein constitutes financial, legal, accounting, or professional business advice.

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PRISM PROFILES

Map Your Business

Quick wins first. Then the rest, in order.

564 working days a year are on the table for Meridian Industrial Group. Tick where to start, sign, and the first workflows can be live within weeks.

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Your plan, kept up to date

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