

A roadmap before a larger build

An electrical contractor wanted to reduce repetitive office work while retaining the systems and practical knowledge its team relied on.

The work

An on-site walkthrough followed incoming orders, job records, engineer notes, invoicing and supporting spreadsheets. Read-only operational analysis helped test assumptions and identify dependencies.

Completed consulting deliverables

An operations diagnostic, an opportunity map and a phased roadmap. Recommendations considered value, feasibility and urgency, with indicative costs, dependencies and approval points. The roadmap included ideas to defer and improvements that did not need new software.

Ownership and implementation

The client owned the roadmap and could use it with Elevate AI, its team or another provider. Human approval remained part of proposed financial and operational workflows. Implementation is separately scoped.

What this evidence establishes

A completed consulting and planning engagement. It does not establish that proposed automations were implemented or that estimated savings were achieved.

Read the public case

<https://www.elevateai.co.uk/case-studies/electrical-contractor-operations-roadmap>

The following worksheet is a general decision aid. It is not the client's confidential roadmap.

Which workflow should you improve?

Record one problem, its evidence and the conditions for proceeding. Type beneath each prompt in the editable document, or use this print worksheet. This PDF is not an interactive form.

1. Problem and owner

What fails or takes too long? Who owns the process?

Notes:

2. Observed baseline

Record volume, time, errors, the date range and evidence source.

Notes:

3. Alternatives

Could you simplify the process, use existing tools, automate or defer?

Notes:

4. Dependencies and exceptions

Record data, systems, access, human review and failure handling.

Notes:

5. Whole-life costs

Include discovery, build, migration, training, licences and upkeep.

Notes:

6. Benefit and confidence

Capacity released is not automatically cash saved. State assumptions.

Notes:

7. Acceptance and review

What must work? Who signs off? When will the result be reviewed?

Notes:

8. Decision and next step

Proceed, test, investigate or defer. Name the owner and date.

Notes:

Identify the largest uncertainty and the smallest useful check. A roadmap can recommend not building a system. All eight questions are also available as HTML on the case page.