

The

AI Automation *Atlas*

Every industry. Every day-to-day task. Mapped for AI automation and customised to each client.

48
INDUSTRIES

11
SECTORS

768
DAILY ACTIVITIES AUTOMATED

192
SIGNATURE AI SOLUTIONS

INTRODUCTION

About this *Atlas*

> *Most businesses do not need more software. They need the work between their software done for them.*

48 INDUSTRIES MAPPED

11 SECTORS

768 DAY-TO-DAY ACTIVITIES

192 SIGNATURE AI SOLUTIONS

240 CUSTOMISATION LEVERS

Every organisation runs on daily routines: answering enquiries, chasing documents, keying data from one system into another, reconciling numbers, sending reminders and preparing reports. These tasks are essential, repetitive and rule-bound, which is exactly the work modern AI now does reliably, at any hour and in the languages customers actually use.

This Atlas maps those routines industry by industry. For each of 48 industries across 11 sectors it shows the day-to-day activities AI can take over, the signature solutions to deploy, the systems they plug into, how each is tailored to the client, and a practical 30-day pilot that proves value quickly.

Nothing here is off the shelf. Every automation is configured around the client's own processes, approval rules, languages, systems and data-hosting needs, and people stay in control of every decision that matters.

How to read an industry spread

1 **Industry profile**
Overview, automation potential, complexity and the people who decide.

2 **Day-to-day operations**
Sixteen recurring activities across four functions, and what AI does with each.

3 **A day with AI**
What the automations have already handled at each point of the working day.

4 **Signature solutions**
Four flagship AI solutions built for that industry.

5 **Integrations & customisation**
The systems we connect and the levers we tailor per client.

6 **Outcomes & 30-day pilot**
What improves, and a week-by-week plan to get started.

Legend

AUTOMATION POTENTIAL

Very high ●●●●●
High ●●●●○
Moderate ●●●○○

IMPLEMENTATION

Low complexity ▬
Medium ▬▬
High complexity ▬▬▬

FUNCTION STRENGTH

Per function ▬
Heat map ■■■■■
Scale 1 low – 5 high

THE TOOLKIT

The Automation *Stack*

Six AI capabilities, combined differently for every client, power each automation in this Atlas.

01

Conversational & Voice AI

Chat, WhatsApp and phone agents that answer, book, collect and escalate in the customer's language, at any hour.

02

Document Intelligence

Reads invoices, IDs, contracts, forms and handwritten notes, extracts the data and checks it against business rules.

03

Agentic Workflow Automation

AI agents that carry a task end to end across systems, with RPA bridges wherever no API exists.

04

Predictive Analytics

Forecasts demand, cash, churn, equipment failure and risk from the client's own operating history.

05

Computer Vision

Turns cameras and photos into counts, inspections, damage reports and safety alerts.

06

GenAI & Knowledge Assistants

Drafts documents, emails and reports, and answers staff questions from the company's own knowledge.

How every engagement runs

1

Discover

Map daily processes, volumes, systems and pain points with the people who run them.

2

Design

Choose the automations, business rules, approval points and success measures with the client.

3

Deploy

Build, integrate and run alongside staff in a 30-day pilot before going fully live.

4

Run & Improve

Monitor accuracy, retrain on new cases and extend to the next process.

Built-in guardrails

Human in the loop
People approve every decision that matters

Full audit trail
Every action logged, explainable and reversible

Your hosting choice
Cloud, private cloud or on-premise

Secure by design
Role-based access and encrypted data

COMMON TO EVERY BUSINESS

Universal *automations*

Whatever the industry, these back-office routines exist in every organisation, and each can be automated from day one.

Finance & Accounts 01

- Supplier invoices captured, coded and matched to purchase orders
- Bank, card and payment-gateway reconciliations every night
- Customer payment reminders and statement runs
- VAT and GST working papers and month-end close checklists

HR & Payroll 02

- CV screening, interview scheduling and offer letters
- Onboarding checklists, documents and system access
- Attendance, leave and payroll input validation
- Employee helpdesk for policy, payslip and leave questions

Sales & CRM 03

- Instant reply and qualification for every new lead
- Quotations and proposals drafted from approved templates
- Follow-up sequences on email and WhatsApp
- CRM records updated automatically from calls and emails

Customer Service 04

- Chat, WhatsApp and voice assistants that never close
- Ticket classification, routing and suggested replies
- Order, booking and status questions resolved instantly
- Feedback and reviews collected and analysed for sentiment

Procurement & Inventory 05

- Purchase requests, approvals and purchase-order creation
- Supplier quotations compared side by side
- Reorder suggestions from sales and stock levels
- Delivery follow-ups and goods-received matching

IT & Administration 06

- Password resets, access requests and new-joiner set-up
- Asset, licence and contract renewal tracking
- Document filing, naming and instant search
- Meeting notes, minutes and action tracking

Marketing 07

- Social posts, newsletters and ad copy drafted on brand
- Campaign performance reports compiled every week
- Lead lists enriched, cleaned and segmented
- Website chat that captures and books prospects

Management Reporting 08

- Daily dashboards that combine every system in one view
- Alerts the moment numbers drift off plan
- Board and MIS packs assembled automatically
- Ask-your-data assistant for plain-language questions

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Click any industry or sector to jump straight to its pages. Dots show automation potential; the label shows implementation complexity.

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01

SECTOR 01 OF 11

Banking, Financial Services & Insurance

Regulated, document-heavy and high-volume: the ideal ground for AI that reads, checks and decides within the rules.

INDUSTRIES IN THIS SECTOR

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Banking

From branch counter to back office, AI that runs the bank's daily grind.

01

INDUSTRY OVERVIEW

Banks process thousands of repetitive, rule-bound transactions every day: account openings, KYC refreshes, loan files, reconciliations and regulatory returns. Most of it still moves through email, spreadsheets and maker-checker queues. AI agents can read, verify, route and report on this work end to end, leaving bankers free for judgement calls and relationships.

AUTOMATION POTENTIAL ●●●●●

IMPLEMENTATION ▬▬▬ High

TYPICAL DECISION MAKERS

- Chief Operating Officer
- Head of Retail Operations
- Chief Compliance Officer

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Onboarding & KYC

1. **Account opening**
   Document AI reads IDs, passports and trade licences, pre-fills the account form and flags mismatches.
2. **Periodic KYC refresh**
   Agents chase expiring documents over WhatsApp and email, then re-verify each upload against records.
3. **AML name screening**
   Screens names against sanctions and PEP lists and clears obvious false positives with an audit trail.
4. **Customer due diligence**
   Compiles internal data and adverse-media findings into a ready-to-review due-diligence note.

B Lending Operations

1. **Loan application intake**
   Collects payslips and statements, then extracts income, obligations and ratios automatically.
2. **Credit memo drafting**
   GenAI drafts the credit appraisal note from extracted financials for the officer to review.
3. **Collections follow-up**
   Voice and WhatsApp agents send reminders, record promises-to-pay and update the system.
4. **Covenant monitoring**
   Tracks covenants and document expiries, alerting relationship managers before a breach.

C Back Office & Finance

1. **Nostro & GL reconciliation**
   Matches entries overnight and routes only genuine breaks to the operations team.
2. **Trade finance documents**
   Reads LCs, invoices and bills of lading and checks every discrepancy against the credit terms.
3. **Payment exceptions**
   Classifies returned items and repairs payment messages before the cut-off time.
4. **Vendor invoices**
   Captures, codes and three-way matches supplier invoices for one-click approval.

D Service, Risk & Compliance

1. **Contact-centre queries**
   Bilingual voice and chat assistants resolve balance, card and statement requests around the clock.
2. **Complaints handling**
   Classifies complaints, drafts replies and tracks every regulatory resolution deadline.
3. **Regulatory returns**
   Pulls data from source systems and pre-builds central-bank returns with reconciliations.
4. **Fraud alert triage**
   Scores alerts and assembles case evidence so investigators focus on real fraud.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

06:00 — Overnight reconciliations finish; only genuine breaks wait in the queue.

08:30 — KYC agent has reminded every customer whose ID expires this month.

11:00 — New loan files arrive fully extracted, with a draft credit memo attached.

15:00 — Compliance reviews pre-screened AML alerts, each with an evidence pack.

19:00 — Branch dashboards and regulatory MIS publish to management automatically.

Signature AI solutions

BUILT FOR BFSI

DOCUMENT AI

AI Onboarding Desk

End-to-end digital onboarding: ID capture, screening and account creation in the core system, with human review only for flagged cases.

VOICE AI

Collections Voice Agent

Multilingual outbound agent that calls, agrees promises-to-pay within approved rules and logs every outcome back to collections.

KNOWLEDGE ASSISTANT

Credit Copilot

Reads the whole loan file, spreads the financials, checks credit policy and drafts the appraisal note so teams decide faster.

WORKFLOW AUTOMATION

Recon & Ops Agent

Runs daily reconciliations, exception repairs and MIS packs on schedule, escalating only what needs a banker's eye.

Systems we integrate with

- Core banking (Finacle, Temenos)
- Loan origination systems
- AML screening (e.g. World-Check)
- SWIFT & payment gateways
- CRM (Salesforce, Dynamics 365)
- WhatsApp Business API
- Document management systems
- Regulatory reporting tools

Customised to each client

1. Map the bank's own product rules, approval matrices and maker-checker steps into every agent.
2. Deploy on-premise or in a private cloud to meet data-residency and central-bank rules.
3. Train assistants on the bank's policies, tariffs and FAQs in the languages its customers use.
4. Set confidence thresholds that decide what is auto-approved and what goes to a human.
5. Connect to core systems through APIs, or through RPA where no API exists.

Business outcomes

Faster onboarding
Accounts opened in one session instead of after days of back-and-forth.

Lower operating cost
Repetitive maker work moves to agents; staff focus on checking and selling.

Stronger compliance
Every screening, decision and override is logged for auditors and regulators.

Better service
Answers on any channel at any hour, with a smooth handover to staff.

START HERE · 30-DAY PILOT

Automate retail KYC refresh for one branch cluster

1 — WEEK 1
Map the current KYC refresh process, documents and approval rules with the ops team.

2 — WEEK 2
Configure document AI and WhatsApp and email reminder agents on a test data set.

3 — WEEK 3
Run live alongside staff, then tune accuracy and escalation thresholds.

4 — WEEK 4
Go live, measure turnaround and effort saved, and select the next process.

Insurance Carriers & Brokers

From first quote to claim settlement, AI that keeps every policy moving.

INDUSTRY OVERVIEW

Insurers and brokers run on paperwork: proposal forms, quote requests, endorsements, renewals and claim files arrive by email and WhatsApp and are rekeyed into policy and claims systems. AI agents read each submission, prepare quotes, chase missing documents, track renewals and triage claims, so underwriters and handlers spend their day on risk and settlement decisions.

AUTOMATION POTENTIAL ●●●●●

IMPLEMENTATION ▬▬▬ High

TYPICAL DECISION MAKERS

- Chief Operating Officer
- Head of Claims
- Head of Underwriting

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Distribution & Quoting

1. **Quote requests**
   Reads RFQs and broker emails, extracts the risk details and returns indicative quotes from rating rules.
2. **Market comparison**
   Gathers insurer quotes and lines up cover, exclusions and premiums side by side for the client.
3. **Lead follow-up**
   Agents call back web and WhatsApp leads within minutes, qualify needs and book adviser slots.
4. **Proposal form checks**
   Document AI checks signed proposals for missing answers, disclosures and signatures before binding.

B Underwriting & Policy Admin

1. **Submission triage**
   Scores incoming submissions against risk appetite and routes each to the right underwriter queue.
2. **Risk data extraction**
   Pulls values, locations, loss history and fleet lists from schedules and spreadsheets into the system.
3. **Endorsements**
   Processes address, vehicle and sum-insured changes, recalculates premium and issues the endorsement.
4. **Policy document issue**
   Generates schedules, certificates and wordings in the client's language and sends them for e-signature.

C Claims Handling

1. **First notice of loss**
   Voice and chat agents take FNOL details, photos and documents, then open the claim in the system.
2. **Claim document checks**
   Document AI reads repair invoices, medical bills and police reports and lists what is still missing.
3. **Fraud indicators**
   Flags unusual patterns, duplicate invoices and repeat claimants for the special investigations team.
4. **Claimant status updates**
   Sends proactive WhatsApp and SMS updates at every stage, cutting 'where is my claim' calls.

D Renewals & Compliance

1. **Renewal invitations**
   Prepares renewal terms, sends reminders and chases unpaid renewals until cover is confirmed.
2. **Premium collection**
   Matches bank receipts to policies and nudges brokers and clients on overdue premium balances.
3. **Commission reconciliation**
   Reconciles insurer commission statements against placed business and flags short payments.
4. **Regulatory reporting**
   Compiles complaints logs, claims ageing and statutory returns from source data for sign-off.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

07:00 — Overnight renewal run done: terms ready for every policy due next month.

09:00 — Quote desk opens with weekend RFQs already extracted and priced.

11:30 — Motor claim photos arrive on WhatsApp; the claim is opened and triaged.

14:00 — Underwriters review only out-of-appetite risks, each with a data summary.

18:00 — Commission and premium receipts reconciled; exceptions sent to finance.

Signature AI solutions

BUILT FOR BFSI

DOCUMENT AI

Submission Intake Agent

Reads broker emails, proposal forms and risk schedules, structures the data and lands a ready-to-rate submission in the policy system.

CHAT ASSISTANT

Claims FNOL Assistant

WhatsApp and web assistant that captures loss details, photos and documents, opens the claim and keeps the claimant updated throughout.

AI AGENT

Renewal Retention Agent

Works the renewal book weeks ahead: prepares terms, calls or messages clients, answers questions and hands hot cases to account handlers.

PREDICTIVE AI

Claims Fraud Scorer

Scores each new claim for fraud and leakage indicators and gives investigators a clear list of reasons, never an automatic rejection.

Systems we integrate with

- Policy admin (Guidewire, Duck Creek)
- Broker systems (Applied Epic)
- Claims management systems
- CRM (Salesforce, Dynamics 365)
- WhatsApp Business API
- Contact centre (Genesys, Avaya)
- E-signature (DocuSign, Adobe Sign)
- Accounting & ERP (SAP, Oracle)

Customised to each client

1. Encode each line's underwriting appetite, referral limits and authority levels into the agents.
2. Mirror the insurer's or broker's own product wordings, clauses and document templates.
3. Run claim assistants in the languages and channels the client's customers already use.
4. Host in-country or in a private cloud to satisfy data-residency and insurance regulator rules.
5. Tune which claim types settle straight through and which always need a handler's sign-off.

Business outcomes

Quicker quotes
Brokers and clients get priced terms the same day, not after rounds of email.

Higher retention
Every renewal is worked on time, so fewer policies lapse through simple neglect.

Better claims experience
Claimants report a loss once and are kept informed until the claim is settled.

Less claims leakage
Duplicate invoices and suspicious patterns are caught before payment, not after.

START HERE · 30-DAY PILOT

Automate motor claims intake for one product line

1 — WEEK 1
Map the current FNOL journey, claim documents and handler checklists with the team.

2 — WEEK 2
Configure the WhatsApp claims assistant and document AI against recent closed claims.

3 — WEEK 3
Run live on new motor claims with handlers reviewing every case and tuning the rules.

4 — WEEK 4
Extend to all motor claims, review turnaround and claimant feedback, plan the next line.

NBFCs, Lending & Microfinance

Lending at field speed: faster sanctions, cleaner books and steadier collections.

02

INDUSTRY OVERVIEW

NBFCs and microfinance lenders run on volume: small-ticket applications, field visits, bank-statement checks, disbursements and repayment follow-ups. Much of it still sits with loan officers, spreadsheets and call lists. AI reads documents, scores applications, plans collections and keeps the books reconciled, so teams lend faster without loosening credit discipline.

AUTOMATION POTENTIAL ●●●●●

IMPLEMENTATION ▬▬▭ Medium

TYPICAL DECISION MAKERS

- Chief Executive Officer
- Head of Credit
- Head of Collections

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Sourcing & Onboarding

1. **Lead qualification**
   Agents call or message new leads, check basic eligibility and book a field or branch visit.
2. **KYC document capture**
   Document AI reads ID cards, address proofs and business registrations captured on the officer's phone.
3. **Bank statement analysis**
   Reads statements and turns inflows, bounces and existing EMIs into a single cash-flow view.
4. **Group & centre formation**
   Checks group members for overlaps and existing loans, and prepares the centre meeting roster.

B Credit & Disbursement

1. **Credit scoring**
   Combines bureau data, statements and field notes into a risk score within the lender's own policy.
2. **Field visit reports**
   Turns officers' voice notes and photos into a structured visit report attached to the loan file.
3. **Sanction letters**
   Drafts sanction letters and loan agreements from the approved terms, ready for e-signature.
4. **Disbursement checks**
   Confirms documents, mandates and bank details are complete before any funds are released.

C Collections & Recovery

1. **EMI reminders**
   Sends pre-due reminders by WhatsApp, SMS and voice in the borrower's language, with a payment link.
2. **Early bucket calling**
   Voice agents reach borrowers who missed a payment, log the reason and agree a new date within policy.
3. **Field collection routes**
   Plans daily routes for collection officers by priority, location and promised payment dates.
4. **Receipt reconciliation**
   Matches cash, wallet and bank receipts to loan accounts and flags unallocated payments each evening.

D Portfolio & Compliance

1. **Portfolio monitoring**
   Predictive models spot accounts showing early stress so teams act before they slip into arrears.
2. **Bureau reporting**
   Prepares the regular credit-bureau submission files and fixes format errors before upload.
3. **Statutory returns**
   Assembles portfolio, NPA and branch data into the regulator's return templates for review.
4. **Branch audit checks**
   Samples loan files and cash records and lists gaps for the internal auditor before each visit.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

07:30 — Field officers receive optimised collection routes and borrower notes.

10:00 — New applications scored overnight; clean files queued for sanction.

12:30 — Voice agent has called every borrower due today and logged their replies.

16:00 — Disbursement batch checked for missing mandates before release.

20:00 — Receipts reconciled and the portfolio-at-risk dashboard refreshed.

Signature AI solutions

BUILT FOR BFSI

DOCUMENT AI

Loan File Reader

Captures KYC, income proofs and bank statements from the field app, extracts every figure and assembles a complete, policy-checked loan file.

VOICE AI

Repayment Voice Agent

Calls borrowers before and after due dates in local languages, explains dues, shares payment links and logs every promise for collections.

PREDICTIVE AI

Early Warning Engine

Watches repayment behaviour, bureau updates and field signals to flag stressed accounts early and suggest the right next action for each.

AI AGENT

Field Officer Copilot

Mobile assistant that plans visits, records voice notes as visit reports and answers product and policy questions on the spot.

Systems we integrate with

- Lending platforms (Mambu, FinnOne)
- Credit bureaus (Experian, Equifax)
- CRM (Salesforce, LeadSquared)
- Payment gateways & e-mandates
- Accounting (Tally, Zoho Books)
- WhatsApp Business API
- Field collection mobile apps
- E-signature & e-KYC services

Customised to each client

1. Encode the lender's own credit policy, deviation rules and sanction authority by ticket size.
2. Run reminders and calls in the regional languages and dialects of each branch's borrowers.
3. Shape collection scripts and tone to the lender's fair-practice code and contact-hour limits.
4. Work offline-first on field devices where connectivity is weak, syncing once back in range.
5. Choose scorecard variables and cut-offs per product: microloans, MSME, gold or vehicle loans.

Business outcomes

Faster sanctions
Applicants hear back quickly because files arrive complete and pre-scored.

Healthier portfolio
Stress is spotted early, while a conversation can still fix the problem.

More productive field
Officers spend their days with borrowers, not filling forms and call sheets.

Audit-ready books
Receipts, files and returns reconcile daily, with a trail for every change.

START HERE · 30-DAY PILOT

Launch AI repayment reminders in a pilot branch cluster

1 — WEEK 1
Review current reminder scripts, contact rules, languages and the collections workflow.

2 — WEEK 2
Configure WhatsApp and voice agents with payment links and connect to the loan system.

3 — WEEK 3
Go live on pre-due and early-bucket accounts with supervisors listening to sampled calls.

4 — WEEK 4
Compare promise and payment behaviour with other branches and agree the wider rollout.

Wealth Management & Stock Broking

More time with clients, less time on paperwork, reports and trade breaks.

INDUSTRY OVERVIEW

Wealth managers and brokers juggle client onboarding, suitability checks, trade instructions, portfolio reviews and market questions. Advisers spend evenings building reports while operations teams reconcile contract notes and margin calls by hand. AI prepares reviews, answers routine queries, checks every trade against mandates and keeps compliance records current.

AUTOMATION POTENTIAL ●●●●○

IMPLEMENTATION ▬▬▬ High

TYPICAL DECISION MAKERS

- Managing Director
- Head of Wealth Advisory
- Head of Broking Operations

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Client Onboarding

1. **Trading account opening**
   Document AI reads IDs, proofs and bank details, fills the application and flags gaps before submission.
2. **Risk profiling**
   Runs a conversational risk questionnaire and maps answers to the firm's suitability categories.
3. **Nominee & mandate updates**
   Captures change requests, checks signatures and documents and updates the back office for approval.
4. **Investor queries**
   Assistant answers questions on holdings, statements, fees and corporate actions on chat or email.

B Advisory & Research

1. **Portfolio review packs**
   GenAI drafts each client's review pack: performance, allocation drift and talking points for the adviser.
2. **Morning market notes**
   Summarises overnight markets and house views into short notes tailored to each client segment.
3. **Meeting notes & actions**
   Transcribes adviser meetings, logs actions in the CRM and drafts the follow-up email for approval.
4. **Rebalancing proposals**
   Spots portfolios outside their model ranges and prepares rebalancing trades for adviser sign-off.

C Trading & Operations

1. **Order instructions**
   Reads client instructions from email and chat, checks limits and mandates and stages the order.
2. **Trade reconciliation**
   Matches executions, contract notes and custodian records daily and isolates genuine breaks.
3. **Margin calls**
   Monitors margin shortfalls intraday and messages clients with clear top-up or square-off options.
4. **Corporate actions**
   Reads issuer notices, updates entitlements and alerts affected clients to elections falling due.

D Compliance & Reporting

1. **Suitability checks**
   Checks every recommendation against the client's risk profile and records the rationale for audit.
2. **Trade surveillance**
   Flags unusual trading, front-running patterns and personal-account conflicts for compliance review.
3. **Client statements**
   Generates branded holding, transaction and tax statements and distributes them on schedule.
4. **Call & chat records**
   Indexes recorded calls and chats so compliance can search any client conversation in seconds.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

07:00 — Market note for each client segment drafted and waiting for approval.

09:15 — Order instructions from overnight emails staged and checked against limits.

12:00 — Margin shortfall messages sent; replies logged against each account.

15:30 — Advisers have tomorrow's review packs ready, with drift and talking points.

18:30 — Trades reconciled with the custodian; only real breaks left for ops.

Signature AI solutions

BUILT FOR BFSI

KNOWLEDGE ASSISTANT

Adviser Copilot

Prepares every client meeting: portfolio snapshot, recent activity, open requests and suggested talking points, then logs the outcome in the CRM.

CHAT ASSISTANT

Client Service Assistant

Answers holdings, statement and fee questions on WhatsApp, web and app, and routes trade or advice requests to a licensed person.

WORKFLOW AUTOMATION

Trade Ops Agent

Reconciles trades, contract notes and custodian files, handles corporate-action updates and raises exceptions before the next settlement cycle.

GENAI CONTENT

Review Pack Generator

Turns portfolio data and house views into personalised review packs and commentary in the firm's tone, ready for adviser edits.

Systems we integrate with

- Portfolio systems (Addepar, Orion)
- Trading platforms (MetaTrader)
- Market data (Bloomberg, LSEG)
- CRM (Salesforce, Wealthbox)
- Custodian & depository feeds
- Back-office & clearing systems
- WhatsApp Business API
- Call recording & Microsoft Teams

Customised to each client

1. Load the firm's model portfolios, product shelf and suitability matrix into every check.
2. Write client content in the firm's house style, with disclaimers tuned to each jurisdiction.
3. Keep advice-like answers behind a licensed adviser, with clear handover rules per channel.
4. Set per-client limits, mandate restrictions and escalation paths for orders and margin.
5. Keep client data in-region, with role-based access for advisers, ops and compliance teams.

Business outcomes

More client time
Advisers walk into meetings prepared, without late nights building reports.

Fewer trade breaks
Reconciliations run daily, so problems are fixed before settlement pressure.

Defensible advice
Each recommendation carries its suitability check and rationale on file.

Responsive service
Clients get quick, accurate answers on holdings and statements on any channel.

START HERE · 30-DAY PILOT

Automate portfolio review packs for one adviser team

1 — WEEK 1
Agree the review-pack format, data sources and compliance wording with the advisers.

2 — WEEK 2
Connect portfolio and CRM data and generate draft packs for a sample of clients.

3 — WEEK 3
Advisers use the packs in live meetings while the content and tone are refined.

4 — WEEK 4
Roll out across the team, gather adviser and client feedback, and pick the next use.

Fintech, Payments & Exchange Houses

Remittances, payments and onboarding that scale without adding headcount.

INDUSTRY OVERVIEW

Payment firms and exchange houses handle a constant flow of time-critical transactions: remittances, card payments, FX deals, merchant onboarding and disputes. Compliance checks, failed payments and customer queries pile up at counters and in support queues. AI monitors transactions, onboards customers and merchants, answers routine tickets and repairs failed payments.

AUTOMATION POTENTIAL ●●●●●

IMPLEMENTATION ▬▬▬ High

TYPICAL DECISION MAKERS

- Chief Executive Officer
- Head of Compliance & MLRO
- Head of Payment Operations

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Customer & Merchant KYC

1. **Remitter registration**
   Document AI reads ID cards and passports at the counter or in the app and pre-fills the profile.
2. **Merchant onboarding**
   Collects trade licences, ownership and website details, checks them and scores merchant risk.
3. **Beneficiary verification**
   Validates beneficiary names, account formats and bank codes before the first transfer leaves.
4. **ID expiry follow-up**
   Messages customers whose documents are expiring and blocks transfers only when policy requires.

B Transaction Monitoring

1. **Sanctions screening**
   Screens senders and beneficiaries in real time and auto-clears hits that match only on common names.
2. **AML alert review**
   Groups related alerts, pulls customer history and drafts the case summary for the analyst.
3. **Card fraud checks**
   Scores card and wallet transactions in real time and steps up authentication on risky ones.
4. **Suspicious report drafts**
   Drafts suspicious transaction report narratives from case evidence for MLRO approval and filing.

C Payments & Settlement

1. **Failed payment repair**
   Reads each rejection reason, fixes common beneficiary data errors and requeues the transfer.
2. **Settlement reconciliation**
   Matches partner, scheme and bank settlement files to the ledger and isolates unexplained items.
3. **FX rate publishing**
   Pulls market rates, applies the margin rules per corridor and updates counters, app and website.
4. **Chargebacks & disputes**
   Gathers transaction evidence, drafts the dispute response and tracks every scheme deadline.

D Customer Support

1. **Transfer status queries**
   Chat and voice assistants track any transfer by reference and explain delays in plain language.
2. **Refund requests**
   Checks eligibility, raises the refund in the payments system and confirms back to the customer.
3. **Merchant support tickets**
   Classifies merchant tickets on payouts and integration issues and suggests fixes from the docs.
4. **Rate & fee enquiries**
   Answers corridor rates, fees and delivery times instantly in the customer's preferred language.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

07:00 — Morning FX rates published to branches, app and website by corridor.

09:30 — Overnight sanctions hits cleared or queued, each with matching evidence.

12:00 — Lunch-hour remittance rush: chat handles status checks, counters stay clear.

15:30 — Rejected transfers repaired and resent ahead of partner cut-off times.

21:00 — Settlement files reconciled; open items listed for the morning team.

Signature AI solutions

BUILT FOR BFSI

AI AGENT

Smart Screening Desk

Handles sanctions and AML alerts end to end: clears obvious false hits, builds evidence packs and sends genuine risk to the compliance analyst.

CHAT ASSISTANT

Remittance Assistant

WhatsApp and app assistant that quotes rates, tracks transfers, updates beneficiaries and books branch visits in several languages.

WORKFLOW AUTOMATION

Payment Repair Bot

Watches every rejected or stuck payment, fixes known data issues within approved rules and resubmits, escalating anything unusual to ops.

PREDICTIVE AI

Fraud Risk Scorer

Scores transactions, devices and new accounts in real time, learning from confirmed fraud to tighten rules without blocking good customers.

Systems we integrate with

- Payment gateways (Stripe, Adyen)
- Identity checks (Onfido, Sumsub)
- Screening (ComplyAdvantage)
- SWIFT & correspondent banking
- Card processors & scheme portals
- Help desk (Zendesk, Freshdesk)
- WhatsApp Business API
- Data warehouse (Snowflake)

Customised to each client

1. Configure screening thresholds, corridor risk ratings and approval steps to the AML policy.
2. Apply per-corridor rate margins, fee tables and transfer limits exactly as the business sets them.
3. Support the languages of each customer community, from Arabic and Hindi to Tagalog and Urdu.
4. Deploy in-region with encryption and full audit logs ready for regulator and card-scheme reviews.
5. Plug into the existing remittance core and partner APIs instead of replacing the platform.

Business outcomes

Faster customer sign-up
New remitters and merchants start transacting sooner, without paper loops.

Leaner compliance
Analysts spend their day on real risk instead of clearing name-match noise.

Fewer failed transfers
Errors are repaired before cut-off, so money arrives when customers expect.

Quieter support queues
Status, rate and refund questions are answered instantly on chat.

START HERE · 30-DAY PILOT

Automate sanctions alert clearing for remittances

1 **WEEK 1** — Review screening rules, alert history and analyst decisions with the compliance team.

2 **WEEK 2** — Train the clearing agent on past alerts and run it in shadow mode beside analysts.

3 **WEEK 3** — Let it auto-clear the lowest-risk alerts with sampled checks by the MLRO's team.

4 **WEEK 4** — Present accuracy and audit-trail results to compliance and agree the wider scope.

02

SECTOR 02 OF 11

Healthcare & Life Sciences

AI takes on the administration around care, from bookings and documentation to claims and stock, so clinicians spend their time with patients.

INDUSTRIES IN THIS SECTOR

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Hospitals & Multi-specialty Clinics

AI that takes the admin off clinicians, so care teams can focus on patients.

INDUSTRY OVERVIEW

Hospitals run around the clock on admin: appointment calls, registrations, insurance approvals, bed allocation, discharge summaries and claims. Doctors and nurses lose hours to documentation while billing teams chase claim rejections by hand. AI handles bookings, paperwork and claims under strict patient-data controls, supporting clinicians, never replacing their judgement.

AUTOMATION POTENTIAL

IMPLEMENTATION High

TYPICAL DECISION MAKERS

- Chief Executive Officer
- Chief Medical Officer
- Revenue Cycle Director

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Patient Access

1. **Appointment booking**
   Voice and WhatsApp agents book, move and confirm appointments against live doctor schedules.
2. **Registration & ID capture**
   Reads ID and insurance cards at the kiosk or desk and creates or updates the patient record.
3. **Insurance eligibility**
   Checks the patient's cover and benefits with the insurer or TPA before the visit starts.
4. **No-show reduction**
   Sends reminders with preparation instructions and offers freed slots to waiting-list patients.

B Clinical Documentation

1. **Consultation notes**
   Ambient AI drafts the visit note from the consultation for the doctor to check, edit and sign.
2. **Discharge summaries**
   Drafts the discharge summary from the inpatient record; the treating doctor reviews and approves.
3. **Medical coding**
   Suggests ICD and CPT codes from the documentation for certified coders to confirm or correct.
4. **Referral letters**
   Prepares referral and report letters from the chart and sends them to the referring physician.

C Revenue Cycle

1. **Prior authorisation**
   Assembles clinical notes and request forms for insurer pre-approval and tracks every response.
2. **Claim scrubbing**
   Checks claims for coding, documentation and payer-rule errors before they are submitted.
3. **Denial management**
   Reads rejection reasons, drafts the resubmission with supporting notes and queues it for billing.
4. **Patient billing queries**
   Explains bills, deductibles and payment options to patients on chat and takes payments by link.

D Ward & Hospital Ops

1. **Bed management**
   Predicts discharges and admissions so bed managers can plan transfers and cleaning ahead.
2. **Duty rosters**
   Builds nurse and support rosters around skills, leave and expected demand for approval.
3. **Pharmacy & stores stock**
   Forecasts consumable and drug usage by ward and raises replenishment requests before stock-outs.
4. **Patient feedback**
   Collects post-discharge feedback, groups themes and routes complaints to the right department.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

07:00 — Today's clinic lists confirmed; freed slots offered to waiting patients.

09:30 — Insurance eligibility checked for every morning appointment before arrival.

12:00 — Doctors sign AI-drafted consultation notes between patients, not at night.

15:00 — Discharge summaries drafted for review; beds flagged for afternoon turnover.

19:00 — Day's claims scrubbed and submitted; denials queued with draft responses.

Signature AI solutions

BUILT FOR HEALTHCARE

VOICE AI

Patient Access Agent

Answers calls and WhatsApp messages around the clock, books and reschedules visits, checks insurance and sends pre-visit instructions.

GENAI CONTENT

Clinical Notes Assistant

Drafts consultation notes and discharge summaries from the encounter for clinicians to review and sign, with patient data kept in-region.

AI AGENT

Claims & Denials Agent

Scrubs claims against payer rules, prepares pre-approval requests and drafts denial appeals, so billing teams focus on complex cases.

PREDICTIVE AI

Bed Flow Predictor

Forecasts admissions, discharges and bed demand by ward each day, giving bed managers and nursing leads an earlier view of pressure.

Systems we integrate with

- HIS/EMR (Epic, Oracle Health)
- HL7 & FHIR interfaces
- Insurer & TPA claim portals
- Lab & radiology (LIS, RIS/PACS)
- ERP (SAP, Oracle)
- Contact centre & IVR platforms
- WhatsApp Business API
- Patient feedback & survey tools

Customised to each client

1. Mirror each department's scheduling rules, slot lengths and doctor preferences in the agents.
2. Keep patient data in-country, encrypted and access-logged to meet health-data privacy rules.
3. Align note templates with each specialty, so drafts match how clinicians already document.
4. Load payer-specific claim rules and pre-approval forms for every insurer the hospital works with.
5. Offer patient-facing assistants in the languages and dialects the hospital's patients speak.

Business outcomes

Easier patient access
Patients get through first time and leave with a confirmed appointment.

Less clinician admin
Doctors review and sign drafts rather than typing every note from scratch.

Cleaner claims
Errors are caught before submission and denials are worked while still fresh.

Smoother patient flow
Earlier bed and discharge planning eases pressure on wards and emergency.

START HERE · 30-DAY PILOT

Automate appointment booking for outpatient clinics

1 **WEEK 1** — Map booking rules, doctor templates and common call reasons with the front-desk team.

2 **WEEK 2** — Connect the voice and WhatsApp agent to the HIS scheduling module in a test environment.

3 **WEEK 3** — Go live for selected clinics with staff monitoring calls and handling every escalation.

4 **WEEK 4** — Extend to all outpatient clinics and review patient feedback and call-handling quality.

Diagnostic Labs & Imaging Centres

Faster turnaround from booking to signed report, with specialists in control.

INDUSTRY OVERVIEW

Labs and imaging centres run on repetitive workflows: test bookings, home collections, sample tracking, scan scheduling, result validation and report delivery. Staff field constant calls on prices, preparation and report status. AI handles bookings, tracks samples, drafts routine report text and flags delays, while pathologists and radiologists keep every clinical sign-off.

AUTOMATION POTENTIAL ●●●●○

IMPLEMENTATION ▬▬▭ Medium

TYPICAL DECISION MAKERS

- Managing Director
- Laboratory Director
- Head of Customer Experience

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Bookings & Collections

1. **Test & scan bookings**
   Chat and voice agents book tests and scans, quote prices and send preparation instructions.
2. **Home collection routing**
   Assigns phlebotomists by location and time slot and sends live arrival updates to patients.
3. **Prescription reading**
   Document AI reads doctor prescriptions and maps them to the lab's test codes for staff to confirm.
4. **Corporate & B2B orders**
   Processes bulk orders from clinics and employers, creating patient records and labels in one pass.

B Sample & Lab Operations

1. **Sample tracking**
   Tracks each barcoded sample from collection to analyser and alerts staff to delayed or lost tubes.
2. **Sample rejections**
   Logs rejection reasons, notifies the collection team and books a recollection with the patient.
3. **QC monitoring**
   Watches daily quality-control runs and alerts the lab supervisor when results drift out of range.
4. **Reagent stock**
   Forecasts reagent and consumable usage by analyser and raises purchase requests before shortages.

C Imaging & Reporting

1. **Scan scheduling**
   Fits scans around modality availability, contrast needs and technologist rosters, with fewer gaps.
2. **Worklist prioritisation**
   Computer vision flags studies that may need urgent attention so radiologists can read them first.
3. **Report drafting**
   Prefills structured report templates from measurements and dictation for the radiologist to finalise.
4. **Critical result alerts**
   Notifies referring doctors of validated critical values and logs each acknowledgement.

D Results & Billing

1. **Report delivery**
   Sends signed reports securely by WhatsApp, email or portal, with access limited to the patient.
2. **Report status queries**
   Answers 'is my report ready' messages instantly by checking the LIS and imaging systems.
3. **Insurance claims**
   Checks test codes and approvals against payer rules and submits clean claims for each visit.
4. **Referrer activity reports**
   Compiles referral volumes and pending results per referring doctor for the business team.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

06:00 — Home-collection routes set; phlebotomists and patients notified of times.

09:00 — Morning samples tracked into the lab; a missing tube already flagged.

11:30 — Radiology worklist reordered so studies flagged as urgent are read first.

14:00 — Validated reports released to patients and doctors as soon as signed.

18:00 — Reagent orders raised and tomorrow's scan schedule confirmed with patients.

Signature AI solutions

BUILT FOR HEALTHCARE

CHAT ASSISTANT

Lab Booking Assistant

Books tests, scans and home collections on WhatsApp and web, explains preparation and prices, and answers report-status questions instantly.

DOCUMENT AI

Prescription Reader

Reads handwritten and printed prescriptions, maps requested tests to the lab's catalogue and leaves the order ready for staff confirmation.

COMPUTER VISION

Radiology Worklist Triage

Flags imaging studies that may contain urgent findings and moves them up the worklist; radiologists still read and report every study.

WORKFLOW AUTOMATION

Sample Journey Tracker

Follows every sample from collection to result, raising alerts on delays, rejections and turnaround risks before patients start calling.

Systems we integrate with

- Laboratory information systems
- RIS/PACS (Sectra, Philips)
- Analyser middleware
- HL7 & FHIR interfaces
- Insurer & TPA portals
- WhatsApp Business API
- ERP (Odoo, SAP Business One)
- Route & field-service apps

Customised to each client

1. Load the lab's own test catalogue, price lists, packages and preparation instructions.
2. Set which results release automatically after sign-off and which need a call to the doctor.
3. Restrict report access by patient, doctor and corporate client, with in-country data hosting.
4. Match collection zones, time slots and phlebotomist skills to each city the lab operates in.
5. Tune imaging triage to the centre's modalities and the radiologists' reporting priorities.

Business outcomes

Shorter turnaround
Delays surface early, so reports reach patients and doctors on time.

Fewer status calls
Patients check bookings and report status themselves, any time of day.

Safer sample handling
Every tube is tracked, so lost or rejected samples are caught quickly.

Stronger referrals
Doctors get results promptly and clear updates, which keeps them referring.

START HERE · 30-DAY PILOT

Launch a WhatsApp booking and report-status assistant

1 — WEEK 1
Collect the test catalogue, prices, preparation notes and top patient questions.

2 — WEEK 2
Connect the assistant to the LIS for booking and report status in a test environment.

3 — WEEK 3
Go live on WhatsApp for selected branches, with staff taking over complex chats.

4 — WEEK 4
Review chat quality and patient feedback, then add home collections and payments.

Dental, Dermatology & Specialty Clinics

Fuller diaries, happier patients and front desks that keep up with demand.

INDUSTRY OVERVIEW

Specialty clinics win or lose on the front desk: enquiries from Instagram and WhatsApp, consultations, treatment plans, packages, recalls and reviews. Small teams juggle the phone with patients at the counter, and leads slip away overnight. AI answers enquiries, books and recalls patients and prepares treatment estimates, while clinicians make every treatment decision.

AUTOMATION POTENTIAL

IMPLEMENTATION Low

TYPICAL DECISION MAKERS

- Clinic Owner
- Practice Manager
- Group Operations Director

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Enquiries & Bookings

1. **Social media enquiries**
   Replies to Instagram, Facebook and WhatsApp enquiries in minutes, qualifies interest and books consults.
2. **Appointment management**
   Books, moves and confirms appointments across chairs, rooms and practitioners without double-booking.
3. **Missed-call follow-up**
   Texts back every missed call with a booking link and calls back leads not yet converted.
4. **Deposits & pre-payments**
   Sends secure payment links for deposits and packages and confirms the slot once paid.

B Treatment Coordination

1. **Treatment plan estimates**
   Turns the clinician's plan into an itemised estimate with insurance share and payment options.
2. **Consent & intake forms**
   Sends digital medical history and consent forms before the visit and flags incomplete answers.
3. **Before-and-after photos**
   Organises clinical photos by patient and visit with consent tags, ready for clinician review.
4. **Lab & aligner orders**
   Tracks crown, denture and aligner cases with dental labs and alerts staff when a case is late.

C Recall & Retention

1. **Hygiene & check-up recalls**
   Contacts patients due for cleanings, check-ups or top-up sessions and books them in the same chat.
2. **Post-procedure check-ins**
   Sends aftercare instructions and check-in messages, escalating any reported concern to the clinic.
3. **Package session tracking**
   Tracks sessions used on laser, skin or physio packages and nudges patients to book the next one.
4. **Reviews & reputation**
   Invites happy patients to leave Google reviews and drafts polite replies for the manager to post.

D Clinic Admin & Billing

1. **Insurance pre-approvals**
   Prepares pre-approval requests with X-rays, notes and codes and tracks each insurer's reply.
2. **Daily cash-up**
   Reconciles card, cash and payment-link takings against the day's appointments and invoices.
3. **Consumables stock**
   Tracks implants, fillers and dental materials by expiry and usage and drafts supplier orders.
4. **Practitioner schedules**
   Plans clinician and assistant rotas across branches around leave, skills and booking demand.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

08:00 — Overnight Instagram and WhatsApp leads answered and consults booked.

10:00 — Today's patients have completed medical history and consent forms online.

13:00 — Recall agent has filled tomorrow's open hygiene slots from the due list.

16:30 — Treatment estimates for morning consults sent with payment options.

20:00 — Cash-up reconciled and review requests sent to today's happy patients.

Signature AI solutions

BUILT FOR HEALTHCARE

AI AGENT

Front Desk AI Agent

Answers calls, chats and social messages, books into the practice diary, collects deposits and hands sensitive questions to staff.

WORKFLOW AUTOMATION

Recall & Reactivation Engine

Finds patients due for recall or overdue on treatment, sends personalised messages in the clinic's tone and books them straight back in.

GENAI CONTENT

Treatment Plan Explainer

Turns the clinician's plan into a clear, branded estimate and plain-language explanation the patient can read at home and share with family.

KNOWLEDGE ASSISTANT

Clinic Knowledge Assistant

Gives staff instant answers on prices, packages, aftercare protocols and insurer rules, drawn only from the clinic's own approved material.

Systems we integrate with

- Dental PMS (Dentrix, Open Dental)
- Clinic EMR (ModMed, Practo)
- Spa & clinic booking (Zenoti)
- WhatsApp Business API
- Meta lead ads & Instagram
- Google Business Profile
- Accounting (QuickBooks, Xero)
- Payment links & card terminals

Customised to each client

1. Mirror each practitioner's procedure times, chair or room rules and booking preferences.
2. Write every message in the clinic's brand voice, in the languages its patients prefer.
3. Set what the assistant may say about treatments and what must go straight to a clinician.
4. Define recall intervals and package follow-ups per treatment, from hygiene to laser sessions.
5. Keep patient photos and records encrypted, consent-tagged and stored under privacy rules.

Business outcomes

Fuller diaries
Gaps and cancellations are refilled quickly from recall and waiting lists.

More leads converted
Every enquiry gets a fast reply, even at night and on busy clinic days.

Calmer front desk
Staff focus on patients in the room while routine messages are handled.

Loyal patients
Timely recalls and aftercare check-ins keep patients coming back.

START HERE · 30-DAY PILOT

Automate enquiry handling and recalls for one clinic

1 **WEEK 1** — Gather services, prices, practitioner schedules and the most common patient questions.

2 **WEEK 2** — Connect the assistant to WhatsApp, Instagram and the practice diary in a sandbox.

3 **WEEK 3** — Go live on enquiries and overdue recalls, with the front desk reviewing conversations.

4 **WEEK 4** — Review bookings, patient feedback and staff comments, then roll out to other branches.

Pharmacies & Medical Distribution

Right stock, right shelf, right time, from distributor warehouse to counter.

INDUSTRY OVERVIEW

Pharmacies and medical distributors live on fast-moving inventory: prescriptions, refills, batch and expiry tracking, supplier orders, deliveries and returns. Orders arrive by phone and WhatsApp, and pharmacists lose time to stock checks. AI forecasts demand, processes orders, tracks expiries and answers routine questions, while pharmacists oversee every dispensing decision.

AUTOMATION POTENTIAL ●●●●○

IMPLEMENTATION ▬▬▭ Medium

TYPICAL DECISION MAKERS

- Managing Director
- Head of Supply Chain
- Pharmacy Operations Manager

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Counter & Prescriptions

1. **Prescription intake**
   Document AI reads scanned and e-prescriptions and pre-fills the dispensing screen for the pharmacist.
2. **Refill reminders**
   Reminds patients on chronic medicines before they run out and prepares the refill for collection.
3. **Availability queries**
   Checks live stock across branches and tells customers on WhatsApp where an item is available.
4. **Home delivery orders**
   Takes repeat and online orders, confirms the prescription and assigns the nearest delivery rider.

B Inventory & Expiry

1. **Demand forecasting**
   Forecasts demand by branch and SKU using sales history, seasons and local illness trends.
2. **Expiry management**
   Lists batches nearing expiry, suggests transfers between branches and starts supplier returns.
3. **Branch replenishment**
   Drafts daily replenishment orders from sales and minimum levels for the store manager to approve.
4. **Cycle counts**
   Plans rolling stock counts, highlights variances and flags high-value or controlled items for review.

C Distribution & Warehouse

1. **Retailer order intake**
   Reads orders from WhatsApp, email and phone and creates sales orders with the right batches.
2. **Pick, pack & dispatch**
   Sequences picking by route and expiry, so first-expiry stock leaves the warehouse first.
3. **Delivery route planning**
   Plans van routes around delivery windows and cold-chain items, sharing live ETAs with customers.
4. **Cold-chain monitoring**
   Watches fridge and van temperature logs and alerts staff the moment a reading goes out of range.

D Purchasing & Compliance

1. **Supplier purchase orders**
   Raises purchase orders from forecasts and supplier terms and chases confirmations automatically.
2. **Invoices & credit notes**
   Matches supplier invoices, schemes and credit notes to deliveries and flags pricing mismatches.
3. **Batch recalls**
   Traces recalled batches to every branch and customer order and drafts the required notices.
4. **Controlled drug registers**
   Keeps controlled-medicine registers up to date from dispensing data for pharmacist sign-off.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

07:00 — Branch replenishment orders drafted from yesterday's sales, ready to approve.

09:30 — Retailer WhatsApp orders turned into picked, batch-checked sales orders.

12:00 — Chronic patients reminded about refills; collections prepared in advance.

15:00 — Near-expiry stock moved to busier branches before it becomes a write-off.

19:00 — Delivery routes for tomorrow planned; cold-chain logs checked and filed.

Signature AI solutions

BUILT FOR HEALTHCARE

CHAT ASSISTANT

Pharmacy WhatsApp Assistant

Takes refill and delivery orders, checks stock across branches and answers routine product questions, handing clinical queries to a pharmacist.

PREDICTIVE AI

Demand & Expiry Planner

Forecasts demand by branch and product, recommends order quantities and flags expiry risk early enough to transfer or return stock.

AI AGENT

Distributor Order Agent

Reads retailer orders from any channel, checks credit limits and batch availability, creates the sales order and confirms delivery slots.

DOCUMENT AI

Rx Capture Desk

Reads paper and electronic prescriptions, matches items to the product master and prepares the dispensing record for pharmacist verification.

Systems we integrate with

- Pharmacy software (Marg ERP)
- ERP (SAP Business One, Odoo)
- Warehouse management systems
- E-commerce (Shopify, Magento)
- WhatsApp Business API
- Delivery & route planning apps
- Temperature loggers & IoT sensors
- GS1 barcode & serialisation

Customised to each client

1. Load the client's product master, substitution rules and pharmacist approval steps.
2. Set reorder logic per branch: minimum levels, supplier lead times and seasonal patterns.
3. Apply each distributor's credit limits, scheme pricing and order cut-off times to the agent.
4. Handle customer data under health-privacy rules, with in-country hosting and access logs.
5. Answer customers in the languages of each neighbourhood the pharmacy chain serves.

Business outcomes

Fewer stock-outs
Fast movers stay on the shelf because orders follow real demand.

Less expiry waste
Short-dated stock is moved or returned while it still has value.

Faster order cycle
Retailer orders are captured, picked and dispatched without rekeying.

Pharmacists freed up
More time for patient counselling, less for stock checks and phone calls.

START HERE · 30-DAY PILOT

Automate stock replenishment for a group of branches

1 — WEEK 1
Review stock data, reorder rules, supplier lead times and expiry practice per branch.

2 — WEEK 2
Train the forecast on sales history and generate draft orders beside current ones.

3 — WEEK 3
Store managers approve AI-drafted orders daily while forecasts and limits are tuned.

4 — WEEK 4
Compare availability and expiry write-offs with other branches and plan the rollout.

Pharma & Life Sciences Manufacturing

Batch records, deviations and dossiers handled with GMP discipline and full audit trails.

10

INDUSTRY OVERVIEW

Pharma plants run on documented evidence: every batch, test, deviation and label change must be recorded, reviewed and signed. QA and QC teams spend much of each shift checking records, chasing signatures and compiling dossiers. AI reviews batch records, drafts investigations and assembles submissions, while qualified people keep every release decision.

AUTOMATION POTENTIAL ●●●●○

IMPLEMENTATION ▬▬▬ High

TYPICAL DECISION MAKERS

- Head of Quality Assurance
- Plant Director
- Head of Regulatory Affairs

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Quality Assurance

1. **Batch record review**
   Document AI checks executed batch records for gaps, late entries and out-of-range values before sign-off.
2. **Deviation logging**
   Classifies each deviation, pulls related batch and equipment history, and drafts the initial impact note.
3. **CAPA follow-up**
   Agents track every CAPA action against its due date and chase owners before an effectiveness check slips.
4. **Change control**
   Routes change requests to the right reviewers and lists the SOPs, validations and filings each one touches.

B QC Laboratory

1. **Sample scheduling**
   Schedules incoming samples against analyst capacity, instrument availability and release priorities.
2. **OOS investigations**
   Gathers chromatograms, audit trails and analyst notes into a structured first-phase investigation pack.
3. **Stability study pulls**
   Predicts upcoming pull points, reminds analysts and flags trending results before they breach specification.
4. **Certificates of analysis**
   Generates CoAs from approved LIMS results in each customer's format and holds them until QA approves.

C Production & Materials

1. **Campaign scheduling**
   Predictive AI sequences campaigns around cleaning, line changeovers, material arrivals and expiry dates.
2. **Incoming material release**
   Reads supplier CoAs, compares them with specifications and queues each lot for sampling or release.
3. **Equipment calibration**
   Tracks calibration and maintenance due dates and blocks booking of equipment that is out of status.
4. **Supplier qualification**
   Agents collect questionnaires, certificates and audit reports and flag suppliers due for requalification.

D Regulatory & Safety

1. **Dossier compilation**
   Assembles CTD sections from approved source documents and checks every cross-reference before publishing.
2. **Adverse event intake**
   Reads emails, call notes and literature, extracts case details and creates draft safety cases for review.
3. **Artwork & label review**
   Compares new artwork with approved text and flags any change to dosage, warnings or batch coding.
4. **SOP training records**
   Assigns read-and-understand training when an SOP changes and reports who is overdue on each line.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

06:30 — Night-shift batch records are pre-reviewed; QA sees only the flagged entries.

09:00 — The lab schedule is set around today's samples, instruments and urgent releases.

11:30 — A new deviation arrives with batch history and a draft impact note attached.

14:30 — Regulatory reviews a CTD section assembled from approved source documents.

18:00 — CAPA and training dashboards reach site leadership with overdue items named.

Signature AI solutions

BUILT FOR HEALTHCARE

DOCUMENT AI

Batch Review Copilot

Reviews executed batch and lab records against the master record, flags every gap and exception, and gives QA a review-by-exception list.

AI AGENT

Deviation & CAPA Agent

Opens, classifies and routes deviations, drafts root-cause prompts and impact notes, and chases every CAPA action through to closure.

GENAI CONTENT

Dossier Builder

Drafts and assembles submission sections from approved data, keeps version control and checks consistency across modules before review.

KNOWLEDGE ASSISTANT

GMP Knowledge Assistant

Answers operator and analyst questions from the site's approved SOPs and specifications, citing the exact document and version used.

Systems we integrate with

- ERP (SAP S/4HANA, Oracle)
- QMS (Veeva Vault, MasterControl)
- LIMS (LabWare, LabVantage)
- MES (Werum PAS-X, Siemens Opcenter)
- Chromatography data (Waters Empower)
- Safety databases (Oracle Argus)
- Serialisation (TraceLink, SAP ATTP)
- Document management systems

Customised to each client

1. Build in the site's GMP rules, electronic signature steps and data-integrity controls from day one.
2. Validate every agent under the client's computer system validation process before go-live.
3. Train assistants on the plant's own SOPs, specifications and product master data, not generic text.
4. Set which records the AI may only flag and which steps always need a qualified person to sign.
5. Host in the client's private cloud or on site to meet data-residency and regulator expectations.

Business outcomes

Faster batch release
QA reviews by exception, so finished goods leave quarantine sooner.

Inspection-ready records
Every review, flag and signature sits in one traceable audit trail.

Fewer repeat deviations
Patterns across batches and lines surface before they become trends.

Lighter QA workload
Specialists spend their time on investigations, not on checking every entry.

START HERE · 30-DAY PILOT

Review-by-exception for one product's batch records

1 **WEEK 1** — Map the batch record, review checklist and sign-off rules for one product with QA

2 **WEEK 2** — Configure document AI on past batch records and compare its flags with QA's findings

3 **WEEK 3** — Run alongside QA reviewers on live batches, then tune rules and escalation thresholds

4 **WEEK 4** — Agree the validated scope, document results and choose the next record type to automate



03

SECTOR 03 OF 11

Education & Training

From first enquiry to graduation, AI handles admissions, communication and administration so educators can teach.

INDUSTRIES IN THIS SECTOR

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13 Training Institutes, Coaching & EdTech ..... Page 34

Universities & Colleges

From first enquiry to graduation, AI that keeps admissions, registry and campus moving.

INDUSTRY OVERVIEW

Universities juggle enquiries, applications, timetables, exams, fee plans and service requests, mostly across email, portals and spreadsheets. Admissions, registry and finance teams all peak at the same points in each term. AI assistants answer students in Arabic and English, process applications, organise exams and chase fees, so staff focus on teaching and student welfare.

AUTOMATION POTENTIAL ●●●●○

IMPLEMENTATION ▬▬▭ Medium

TYPICAL DECISION MAKERS

- Registrar
- Director of Admissions
- Chief Information Officer

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Admissions & Recruitment

1. **Enquiry handling**
   Bilingual chat and WhatsApp assistants answer programme, fee and entry-requirement questions at any hour.
2. **Application screening**
   Document AI reads transcripts, certificates and IDs, checks entry criteria and flags missing documents.
3. **Applicant follow-up**
   Agents follow up with every enquirer by email and WhatsApp until they apply, enrol or opt out.
4. **Offer letters**
   Generates conditional and unconditional offers from approved templates once the decision is recorded.

B Student Services

1. **Registry requests**
   Issues enrolment letters and handles transcript requests from the student record, routing exceptions.
2. **Course registration help**
   Guides students through add-drop, prerequisites and clashes in Arabic or English and escalates exceptions.
3. **Visa & ID renewals**
   Tracks international students' visa and ID expiries and requests renewal documents well before deadlines.
4. **Concerns & complaints**
   Logs concerns and complaints, routes each to the right office and keeps the student updated on progress.

C Academics & Exams

1. **Timetabling**
   Builds class timetables around rooms, faculty availability and student clashes, and republishes changes.
2. **Attendance monitoring**
   Tracks attendance from the LMS and card readers and alerts advisers when a student starts to fall behind.
3. **Exam logistics**
   Allocates halls and invigilators, issues seating plans and handles special-arrangement requests on time.
4. **Grading support**
   Pre-marks objective items, checks rubric consistency and compiles grade sheets for faculty approval.

D Finance & Campus Operations

1. **Fee collection**
   Sends fee reminders, explains instalment plans and posts payments, escalating defaulters per policy.
2. **Scholarship processing**
   Checks eligibility against scholarship rules, verifies documents and prepares award lists for approval.
3. **Facility & IT requests**
   Logs maintenance, IT and room-booking requests from students and staff and routes them to the right team.
4. **Hostel allocation**
   Allocates rooms against preferences and housing rules, handles swaps and tracks check-in and check-out.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

07:30 — Overnight Arabic and English enquiries are answered; hot leads go to advisers.

10:00 — New applications arrive pre-checked, with missing documents already requested.

12:30 — Exam seating plans and invigilator rosters publish to students and faculty.

15:00 — Fee reminders have gone out; finance reviews only the accounts at risk.

18:30 — Advisers receive attendance alerts for students who need a check-in this week.

Signature AI solutions

BUILT FOR EDUCATION

CHAT ASSISTANT

Bilingual Student Assistant

Arabic and English assistant on web, app and WhatsApp that answers admissions, registry, fee and campus questions and hands over to staff.

DOCUMENT AI

Admissions Processing Desk

Reads and verifies application documents, checks entry criteria, updates the student system and drafts offers for the admissions committee.

PREDICTIVE AI

Exam & Timetable Planner

Builds clash-free class and exam schedules, allocates rooms and invigilators, and replans quickly when rooms or staff change.

WORKFLOW AUTOMATION

Fee & Scholarship Agent

Runs fee reminders, instalment plans, scholarship checks and payment posting on schedule, escalating only accounts that need a person.

Systems we integrate with

- Student systems (Banner, PeopleSoft)
- LMS (Moodle, Blackboard, Canvas)
- CRM (Salesforce Education Cloud)
- ERP (Oracle, SAP, Dynamics 365)
- WhatsApp Business API
- Microsoft 365 & Google Workspace
- Payment gateways
- Campus card & access control

Customised to each client

1. Train the assistant on the institution's catalogue, policies and fee rules in Arabic and English.
2. Mirror each college's admission criteria, committee approvals and offer conditions in the agents.
3. Apply the university's own tone, branding and escalation paths on web, app and WhatsApp.
4. Keep student data in-country with private-cloud or on-campus hosting and role-based access.
5. Set rules for when fee reminders escalate, when holds apply and which cases go to a person.

Business outcomes

Quicker admissions
Applicants get answers and decisions sooner, so fewer drop out mid-way.

Better student experience
Students get help in their own language on any channel, day or night.

Calmer peak periods
Registration and exam weeks run without queues building at every desk.

Healthier fee collection
Reminders and plans go out on time, and at-risk accounts surface early.

START HERE · 30-DAY PILOT

Bilingual admissions assistant for one intake

1 — WEEK 1
Collect programme, fee and entry rules and map the admissions workflow with the team.

2 — WEEK 2
Build the Arabic and English assistant and test it on past enquiries and applications.

3 — WEEK 3
Launch on the website and WhatsApp beside counsellors, then tune answers and handovers.

4 — WEEK 4
Review enquiry-to-application conversion and staff effort, then plan the next stage.

K-12 Schools

Parents informed, teachers freed from paperwork and the school office running calmly.

12

INDUSTRY OVERVIEW

Schools run on routine that never stops: admission enquiries, absence calls, circulars, timetables, cover, marking, report cards, fees and buses. Teachers lose evenings to paperwork and the front office fields the same parent questions all day. AI answers parents in their language, drafts teaching materials and reports, and runs fees and transport updates on schedule.

AUTOMATION POTENTIAL ●●●●○

IMPLEMENTATION Low

TYPICAL DECISION MAKERS

- Principal
- School Business Manager
- Group Director of Schools

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Admissions & Enrolment

1. **Admission enquiries**
   Answers parents on fees, curriculum, seats and visits in their language on WhatsApp and web chat.
2. **Tour & assessment booking**
   Books campus tours and entrance assessments into the admissions calendar and reminds each family.
3. **Document collection**
   Document AI checks birth certificates, transfer letters and past reports, then chases what is missing.
4. **Re-enrolment**
   Agents confirm next year's places with existing families and flag those who seem likely to leave.

B Parent Communication

1. **Daily notices**
   Drafts circulars and class updates from teacher notes and sends them in each family's preferred language.
2. **Absence follow-up**
   Messages parents when a child is marked absent and records the reason against the student record.
3. **Parent queries**
   Answers routine questions on timetables, uniforms, events and fees, and routes the rest to the right staff.
4. **Meeting scheduling**
   Books parent-teacher meetings around teacher slots and sends confirmations and reminders to families.

C Teaching & Assessment

1. **Lesson planning**
   GenAI drafts lesson plans and worksheets aligned to the school's curriculum for teachers to adapt.
2. **Marking support**
   Pre-marks quizzes and objective tests and highlights the students who need extra help this week.
3. **Report card comments**
   Drafts personalised report comments from grades and teacher notes for review and sign-off.
4. **Substitute cover**
   Finds available cover teachers when staff call in sick and updates the day's timetable for everyone.

D Fees, Transport & Office

1. **Fee reminders**
   Sends term fee reminders and receipts, explains payment options and flags overdue accounts to the office.
2. **Bus route updates**
   Plans bus routes from student addresses and alerts parents when a bus is running late on its route.
3. **Books & uniform stock**
   Tracks textbooks, uniforms and lab supplies and raises reorders well before each new term starts.
4. **Maintenance requests**
   Logs maintenance and IT requests from teachers and tracks each one through to completion.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

07:00 — Bus delay alerts reach affected parents before children wait at the stop.

08:15 — Absence messages have gone to parents; replies are logged against each record.

10:30 — Cover teachers are confirmed and the updated timetable is on every screen.

13:30 — Admissions sees today's tours booked and new documents already checked.

16:30 — Teachers review drafted report comments and approve them in a few clicks.

Signature AI solutions

BUILT FOR EDUCATION

CHAT ASSISTANT

Parent Connect Assistant

Multilingual WhatsApp and web assistant that answers parents, books meetings and tours, and sends personalised notices from school systems.

AI AGENT

Admissions Desk Agent

Handles enquiry to enrolment: qualifies leads, books assessments, checks documents and keeps every family updated until the child joins.

GENAI CONTENT

Teacher Copilot

Drafts lesson plans, worksheets, quizzes and report comments in the school's curriculum and style, always for the teacher to review.

WORKFLOW AUTOMATION

Fee & Transport Agent

Runs fee reminders, receipts and bus notifications on schedule and flags overdue accounts and route problems to the school office.

Systems we integrate with

- School MIS (PowerSchool, iSAMS)
- Google Classroom & Moodle
- Microsoft 365 & Teams
- WhatsApp Business API
- Accounting (Tally, Zoho Books, Xero)
- Payment gateways
- School bus GPS tracking
- Admissions CRM (HubSpot, Zoho CRM)

Customised to each client

1. Match each school's curriculum, whether British, American, IB, CBSE or national, in teacher tools.
2. Send notices in Arabic, English and the other languages the school's parents actually use.
3. Apply the school's fee policy, sibling discounts and escalation rules to every fee reminder.
4. Restrict data by role so teachers, parents and office staff see only what they should.
5. Brand the parent assistant with the school's name, tone and leadership-approved responses.

Business outcomes

Happier parents
Families get quick, consistent answers and hear about problems first.

More teaching time
Teachers spend less time on paperwork and more time with their classes.

Fuller classes
Every admission enquiry is followed up, so fewer families slip away.

Smoother mornings
Absences, cover and bus delays are handled before the first bell rings.

START HERE · 30-DAY PILOT

Parent WhatsApp assistant for one school

1 — WEEK 1
Gather fee, calendar, policy and FAQ content and agree escalation rules with leadership.

2 — WEEK 2
Build the assistant in the school's languages and connect it to the MIS for absences.

3 — WEEK 3
Launch to one year group's parents, review conversations daily and refine the answers.

4 — WEEK 4
Extend to all parents, review response times and office effort, then pick the next step.

Training Institutes, Coaching & EdTech

Turn every enquiry into an enrolled learner and keep every learner on track to finish.

12

INDUSTRY OVERVIEW

Coaching centres, training institutes and EdTech platforms live on lead volume: enquiries from ads and walk-ins, counselling calls, demo classes, batch changes, doubts, tests and fee instalments. Counsellors and academic teams lose hours to follow-ups and repeat questions. AI handles lead response, learner support, test analysis and scheduling so experts can sell and teach.

AUTOMATION POTENTIAL ●●●●●

IMPLEMENTATION Low

TYPICAL DECISION MAKERS

- Founder & CEO
- Head of Sales & Admissions
- Academic Director

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Leads & Enrolment

1. **New lead response**
   Calls or messages every new ad and website lead within minutes, qualifies interest and books a counsellor.
2. **Counselling follow-ups**
   Voice and WhatsApp agents follow up with undecided leads, sharing course, batch and fee details.
3. **Demo class booking**
   Books trial classes, sends joining links and reminders, and notes who attended for the counsellor.
4. **Fee instalment tracking**
   Sends instalment reminders and payment links, and pauses access only under the agreed fee policy.

B Learner Support

1. **Doubt resolution**
   Answers subject doubts from the institute's own course material and escalates tough questions to faculty.
2. **Batch & schedule changes**
   Handles batch transfers, missed-class requests and recording access without a call to the help desk.
3. **Progress nudges**
   Spots learners who stop logging in or skip tests and sends a personal nudge or a mentor alert.
4. **Certificate issuing**
   Generates completion certificates once criteria are met and verifies them on request for employers.

C Content & Assessment

1. **Question bank creation**
   GenAI drafts questions by topic and difficulty, tagged to the syllabus, for faculty to approve.
2. **Mock test analysis**
   Analyses each attempt and gives the learner a topic-wise report with a focused revision plan.
3. **Assignment evaluation**
   Pre-scores written and coding assignments against rubrics and drafts feedback for the tutor to edit.
4. **Lecture notes & clips**
   Turns recorded classes into notes, summaries and short revision clips for the learning app.

D Centre & Faculty Ops

1. **Batch scheduling**
   Plans batches around faculty availability, rooms and demand, and publishes timetables to learners.
2. **Faculty payouts**
   Calculates session-based faculty pay from attendance and schedule data and queues it for finance.
3. **Refund requests**
   Checks each refund request against policy, drafts a decision and routes exceptions to a manager.
4. **Centre performance MIS**
   Compiles daily leads, admissions, collections and attendance by centre into a single owner report.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

08:00 — Overnight ad leads have been called back and the warm ones booked for demos.

10:30 — Learners who skipped yesterday's mock test have a nudge from their mentor.

13:00 — Faculty review a fresh question set drafted and tagged to this week's topics.

16:00 — Instalment reminders are out; counsellors call only the learners who need it.

20:30 — The doubt assistant answers evening study questions from the course material.

Signature AI solutions

BUILT FOR EDUCATION

VOICE AI

Admissions Voice Agent

Calls new leads in their language, qualifies course interest and budget, books demo classes and logs every conversation in the CRM.

CHAT ASSISTANT

Learner Help Assistant

Answers doubts, schedule and access questions on app and WhatsApp from the institute's own material, with handover to faculty.

PREDICTIVE AI

Test Insight Engine

Analyses test attempts, maps weak topics, predicts who is falling behind and gives each learner a targeted revision plan.

GENAI CONTENT

Course Content Studio

Turns the syllabus and recorded lectures into question banks, notes and revision material, tagged and ready for faculty review.

Systems we integrate with

- CRM (LeadSquared, Salesforce, Zoho)
- LMS (Moodle, Teachable, Thinkific)
- Video (Zoom, Google Meet, Teams)
- WhatsApp Business API
- Payments (Razorpay, Stripe)
- Cloud telephony & IVR
- Ads (Google Ads, Meta Ads)
- Accounting (Tally, Zoho Books)

Customised to each client

1. Load the institute's courses, batches, fee plans and offers so agents quote only approved terms.
2. Speak to leads in English, Arabic, Hindi or regional languages, always in the brand's own voice.
3. Set counselling rules: when to call, how often to follow up and when to hand over to a person.
4. Align question banks and test reports to the exams or certifications the institute prepares for.
5. Connect to the existing CRM and LMS through APIs, keeping learner data under the client's control.

Business outcomes

More enrolments
Every lead gets a prompt, consistent follow-up, so fewer of them go cold.

Better learner results
Weak topics are spotted early and every learner gets a clear revision plan.

Leaner support desk
Routine doubts and schedule requests no longer sit in a queue for staff.

Clearer centre view
Owners see leads, admissions and collections across every centre daily.

START HERE · 30-DAY PILOT

AI lead response for one course or centre

1 — WEEK 1
Map the lead sources, counselling script, fee rules and CRM stages with the sales team.

2 — WEEK 2
Configure the voice and WhatsApp agents and test them on recent leads and call recordings.

3 — WEEK 3
Run live on new leads beside counsellors, then refine the scripts and handover rules.

4 — WEEK 4
Compare lead-to-enrolment results and counsellor effort, then plan the wider rollout.

SECTOR 04 OF 11

Real Estate, Construction & Facilities

Projects, properties and paperwork: AI keeps leads, sites, contracts and maintenance moving on schedule.

INDUSTRIES IN THIS SECTOR

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Real Estate Developers

From launch day to handover, AI that sells units, collects instalments and informs buyers.

INDUSTRY OVERVIEW

Developers run sales launches, payment plans, construction and handovers at the same time. Sales teams chase leads from portals and brokers, CRM staff send demand notices and answer buyers, and project teams compile progress reports by hand. AI qualifies leads, issues documents, chases instalments and turns site data into buyer updates, so teams focus on selling and delivery.

AUTOMATION POTENTIAL

IMPLEMENTATION Medium

TYPICAL DECISION MAKERS

- Chief Sales Officer
- Head of CRM & Collections
- Project Director

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Sales & Bookings

1. **Lead qualification**
   Responds to portal, ad and broker leads at once, checks budget and timing, and routes serious buyers.
2. **Site visit booking**
   Books show-flat and site visits into sales calendars and sends maps, reminders and follow-ups.
3. **Unit availability queries**
   Answers live questions on units, views, prices and payment plans straight from inventory data.
4. **Booking paperwork**
   Generates reservation forms and sale agreements from approved templates and checks buyer IDs.

B Buyer Care & Collections

1. **Instalment demands**
   Sends demand notices and payment links at each milestone and logs every promise-to-pay against the unit.
2. **Buyer queries**
   Answers questions on payments, documents and handover dates in Arabic and English on WhatsApp.
3. **Construction updates**
   Turns site reports and photos into regular, plain-language progress updates for buyers and brokers.
4. **Handover & snagging**
   Books inspections, logs snags with photos and tracks each one until the contractor closes it.

C Project Delivery

1. **Progress reporting**
   Compiles contractor reports, programme updates and photos into one weekly project status pack.
2. **Contractor payment claims**
   Document AI checks interim payment claims against measured work, approvals and contract terms.
3. **RFIs & drawings**
   Logs RFIs, links each to the right drawing revision and chases consultants for timely answers.
4. **Site photo checks**
   Computer vision compares site photos with the plan to spot delays and missing work early.

D Finance & Approvals

1. **Escrow & receipts**
   Matches buyer receipts to units and escrow accounts and flags unallocated or short payments.
2. **Broker commissions**
   Calculates broker commissions against agreements and collections, then queues them for approval.
3. **Permits & NOCs**
   Tracks permits, NOCs and authority approvals and alerts owners well before any deadline slips.
4. **Sales & collections MIS**
   Builds daily sales, collections and unsold-inventory dashboards for management automatically.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

08:00 — Overnight portal leads are qualified; serious buyers are booked for site visits.

10:00 — Milestone demand notices have gone out with payment links to every buyer.

12:30 — Sales issues booking forms already generated and checked against buyer IDs.

15:30 — The project director reviews a status pack built from site reports and photos.

18:00 — Management sees today's sales, collections and unsold units in one view.

Signature AI solutions

BUILT FOR REAL ESTATE

AI AGENT

Sales Lead Agent

Responds to every portal, ad and broker lead, qualifies budget and intent, books visits and keeps the CRM pipeline up to date.

VOICE AI

Buyer Care Voice Agent

Bilingual voice and WhatsApp agent that handles instalment reminders, document requests and handover questions for every buyer.

DOCUMENT AI

Contract & Document Desk

Generates bookings and sale agreements, reads IDs and payment proofs, and checks every document against the deal record.

COMPUTER VISION

Site Progress Vision

Analyses site photos and drone images against the programme, flags slippage and feeds progress into buyer and board updates.

Systems we integrate with

- CRM (Salesforce, Dynamics 365)
- ERP (SAP, Oracle, Yardi)
- Portals (Bayut, Property Finder)
- Programme (Primavera P6)
- Document control (Oracle Aconex)
- WhatsApp Business API
- Payment gateways & bank feeds
- E-signature (DocuSign, Adobe Sign)

Customised to each client

1. Load each project's inventory, price lists, payment plans and offers so agents quote correctly.
2. Mirror the developer's booking approvals, discount limits and broker rules in every workflow.
3. Run buyer conversations in Arabic, English and other buyer languages, in the brand's own voice.
4. Set reminder timing, tone and escalation for overdue instalments by project and buyer type.
5. Keep buyer data in the region with private-cloud hosting and role-based access for brokers.

Business outcomes

Higher lead conversion
Every lead is answered and followed up, so fewer buyers drift to rivals.

Steadier collections
Instalments are requested on time and every promise-to-pay is tracked.

Informed buyers
Regular, honest progress updates mean fewer anxious calls to the CRM team.

Clearer project view
Management sees sales, cash and site progress in one place every day.

START HERE · 30-DAY PILOT

Lead response and visit booking for one launch

1 — WEEK 1
Map lead sources, qualification questions, inventory data and sales rules for one project.

2 — WEEK 2
Configure the lead agent in Arabic and English and connect it to the CRM and calendars.

3 — WEEK 3
Run live on new leads beside the sales team, reviewing handovers and refining the replies.

4 — WEEK 4
Compare response speed and visits booked with the old process, then plan collections next.

Real Estate Brokerage & Leasing

Faster listings, quicker viewings and tidier deals for every agent on the team.

INDUSTRY OVERVIEW

Brokerages live on speed: new listings, portal leads, viewings, offers, tenancy contracts and renewals all compete for an agent's day. Much of it is copy-paste between portals, WhatsApp and the CRM, and leads go cold while agents are out on viewings. AI writes listings, answers and qualifies leads, books viewings and prepares paperwork, so agents spend time with clients.

AUTOMATION POTENTIAL ●●●●●

IMPLEMENTATION Low

TYPICAL DECISION MAKERS

- Managing Director
- Head of Sales & Leasing
- Operations Manager

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Leads & Listings

1. **Listing creation**
   GenAI writes portal-ready listings from photos and owner details in English and Arabic for approval.
2. **Portal lead response**
   Replies to every portal enquiry within minutes, qualifies budget and area, and suggests matching listings.
3. **Viewing scheduling**
   Books viewings around agent, tenant and owner calendars and sends reminders and directions.
4. **Stale listing checks**
   Flags listings with outdated prices, photos or availability before portals or clients notice.

B Deals & Paperwork

1. **Offer tracking**
   Logs offers and counter-offers from WhatsApp and email against the deal and alerts the manager.
2. **Contract drafting**
   Generates tenancy and sale contracts from approved templates using the agreed deal terms.
3. **Client KYC checks**
   Document AI reads IDs, passports and title deeds and checks that names and details match across them.
4. **Commission splits**
   Calculates agent and co-broker commissions from closed deals and prepares the matching invoices.

C Leasing & Tenants

1. **Rent reminders**
   Sends rent reminders and payment links, records cheques or transfers and flags late tenants.
2. **Renewal notices**
   Prepares renewal offers well ahead of expiry and tracks each tenant's response for the landlord.
3. **Tenant requests**
   Answers tenant questions and logs maintenance issues, passing them on to the property manager.
4. **Move-in and move-out**
   Schedules inspections, captures condition photos and drafts the deposit settlement for approval.

D Agent Productivity

1. **CRM updates**
   Captures notes from calls and WhatsApp chats and updates contacts, deals and next steps automatically.
2. **Pricing comparisons**
   Pulls recent listings and transactions to draft a pricing comparison for owner pitches.
3. **Landlord reporting**
   Sends owners regular updates on enquiries, viewings and feedback for each of their listings.
4. **Agent performance MIS**
   Ranks agents on response times, viewings and deals so managers coach the right people each week.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

08:30 — Overnight portal leads are answered and matched to available listings.

10:00 — Agents start the day with viewings booked and directions sent to clients.

12:30 — New listings drafted from this morning's photos are ready for approval.

15:00 — Renewal offers for leases ending soon are prepared for each landlord.

18:30 — Managers see response times, viewings and deals by agent on one board.

Signature AI solutions

BUILT FOR REAL ESTATE

AI AGENT

Lead Response Agent

Answers portal, website and WhatsApp leads in moments, qualifies needs, suggests matching listings and books viewings for agents.

GENAI CONTENT

Listing Studio

Writes accurate, on-brand listings and social posts from photos and owner details, then checks them before publishing to portals.

DOCUMENT AI

Deal Document Desk

Reads client IDs and title documents, fills tenancy and sale contracts and checks every term before an agent sends them out.

WORKFLOW AUTOMATION

Tenancy Renewal Agent

Tracks every lease, sends rent and renewal reminders, collects responses and keeps landlords informed without manual chasing.

Systems we integrate with

- CRM (Salesforce, Zoho CRM)
- Listing portals & MLS feeds
- WhatsApp Business API
- Google Workspace & Microsoft 365
- E-signature (DocuSign, Adobe Sign)
- Accounting (Xero, QuickBooks, Tally)
- Property management (Yardi)
- Cloud telephony & call recording

Customised to each client

1. Load the brokerage's listings, fee rules and contract templates so agents quote approved terms.
2. Set lead routing by area, language, property type and agent availability, with fair rotation.
3. Write listings and replies in English, Arabic and other client languages in the brand's voice.
4. Apply local advertising and KYC rules as checklists the AI must pass before anything goes out.
5. Choose which steps run automatically and which need a manager's approval, deal by deal.

Business outcomes

No lead left waiting
Every enquiry gets a fast, useful reply, even when agents are busy.

More viewings per agent
Scheduling and reminders run themselves, so agents see more clients.

Cleaner paperwork
Contracts and KYC files are complete and consistent before signing.

Loyal landlords
Owners get regular updates and renewals are handled well before expiry.

START HERE · 30-DAY PILOT

Portal lead response for one sales or leasing team

1 — WEEK 1
Map lead sources, routing rules, listing data and the team's qualification questions.

2 — WEEK 2
Configure the lead agent on WhatsApp and email and connect it to the CRM and calendars.

3 — WEEK 3
Run live on new leads beside agents, reviewing handovers daily and refining the replies.

4 — WEEK 4
Compare response times and viewings booked with before, then add listing automation.

Construction & EPC Contracting

Site diaries, RFIs, payment claims and procurement handled before the next shift starts.

INDUSTRY OVERVIEW

Contractors run several sites at once, each producing daily reports, RFIs, submittals, variations, purchase requests and payment claims. Engineers and quantity surveyors spend evenings compiling paperwork while site issues wait. AI captures site data, controls documents, prepares and checks claims and chases suppliers, so project teams keep work moving and margins protected.

AUTOMATION POTENTIAL

IMPLEMENTATION High

TYPICAL DECISION MAKERS

- Managing Director
- Project Director
- Commercial Manager

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Site Execution

1. **Daily progress reports**
   Turns foreman voice notes, photos and timesheets into a structured daily site diary for the engineer.
2. **Safety observations**
   Computer vision checks site cameras for missing PPE and unsafe zones and alerts the HSE lead at once.
3. **Labour attendance**
   Matches gate and biometric records to crews and cost codes for payroll and productivity tracking.
4. **Snag lists**
   Logs snags with photos and locations and tracks each one until the subcontractor closes it out.

B Engineering & Documents

1. **RFI management**
   Drafts RFIs from site queries, links the drawing reference and chases consultants for their replies.
2. **Submittal reviews**
   Checks material submittals against the specification and highlights deviations before submission.
3. **Drawing revision control**
   Alerts crews when a new revision supersedes a drawing in use, so work follows the latest issue.
4. **Method statements**
   GenAI drafts method statements and risk assessments from templates and past projects for review.

C Commercial & Contracts

1. **Interim payment claims**
   Builds each payment application from measured quantities, approved variations and contract rates.
2. **Variation orders**
   Spots scope changes in instructions and RFIs and drafts variation notices before deadlines pass.
3. **Subcontractor bills**
   Document AI checks subcontractor invoices against work done, retention and agreed contract rates.
4. **Tender BOQ pricing**
   Reads tender BOQs and specifications, matches items to past rates and drafts a priced estimate.

D Procurement & Plant

1. **Material requisitions**
   Converts site requests into purchase requisitions coded to the right project and cost centre.
2. **Supplier quote comparison**
   Collects quotes, compares price, lead time and terms, and recommends a supplier for approval.
3. **Delivery tracking**
   Chases suppliers for delivery dates and warns site teams when a late delivery threatens the programme.
4. **Plant maintenance**
   Predicts servicing needs from equipment hours and books maintenance before breakdowns stop work.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

06:30 — Site cameras are live; PPE and exclusion-zone alerts reach the HSE lead.

09:00 — Yesterday's site diaries are compiled from voice notes, photos and timesheets.

11:30 — Overdue RFIs have been chased again, with the drawing links attached.

14:30 — The commercial team reviews supplier quotes already compared and ranked.

18:00 — The project dashboard shows progress, open issues and cost against budget.

Signature AI solutions

BUILT FOR REAL ESTATE

AI AGENT

Site Diary Assistant

Collects voice notes, photos and timesheets from site teams on WhatsApp and turns them into daily reports in the project system.

COMPUTER VISION

Safety Vision Monitor

Watches site camera feeds for PPE breaches, unsafe access and exclusion-zone entries and sends real-time alerts with images.

DOCUMENT AI

Commercial Claims Copilot

Reads contracts, instructions and measurements to draft payment claims and variations, and checks every subcontractor bill.

WORKFLOW AUTOMATION

Procurement Agent

Turns site requests into requisitions, gathers and compares quotes, chases deliveries and updates the ERP and site teams.

Systems we integrate with

- Planning (Primavera P6, MS Project)
- Procore & Autodesk Construction
- Construction ERP (SAP, Oracle)
- BIM tools (Revit, Navisworks)
- Estimating software (CostX)
- CCTV & site camera systems
- Biometric time & attendance
- WhatsApp Business API

Customised to each client

1. Map the contractor's cost codes, WBS and approval limits into every report and requisition.
2. Use the client's contract forms, such as FIDIC, to drive claims, notices and variation rules.
3. Set safety rules per site: required PPE, restricted zones and who receives each type of alert.
4. Capture site input in the languages crews speak, including Hindi, Urdu, Arabic and English.
5. Run on the client's cloud or on site, with project-level access for partners and consultants.

Business outcomes

Fewer missed claims
Variations and notices are raised on time, protecting project margins.

Safer sites
Unsafe acts are spotted as they happen, not in next week's site audit.

Engineers back on site
Reporting and document chasing no longer eat into engineers' evenings.

Fewer material delays
Late deliveries surface early, before they stall work on the programme.

START HERE · 30-DAY PILOT

Automated site diaries and RFI tracking on one project

1 — WEEK 1
Agree the daily report format, RFI process and project codes with the site team.

2 — WEEK 2
Set up WhatsApp capture for foremen and connect the assistant to the project system.

3 — WEEK 3
Run on live shifts, check every report against the engineer's own version and refine it.

4 — WEEK 4
Review reporting effort and RFI turnaround, then extend to claims or procurement.

Facility & Property Management

Every request logged, every asset maintained and every tenant kept in the loop.

INDUSTRY OVERVIEW

Facility and property managers keep buildings running through a steady flow of tenant requests, planned maintenance, technician dispatch, inspections, service charges and vendor bills. Most of it moves through calls, WhatsApp groups and spreadsheets, so jobs slip through gaps. AI logs and dispatches every request, plans maintenance, checks job completion and handles billing.

AUTOMATION POTENTIAL ●●●●●

IMPLEMENTATION ▬▬▭ Medium

TYPICAL DECISION MAKERS

- Head of Facilities
- Property Manager
- Operations Director

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Helpdesk & Work Orders

1. **Service requests**
   Bilingual WhatsApp and voice assistants log tenant requests with photos and create the work order.
2. **Technician dispatch**
   Assigns jobs by skill, location and priority and keeps the tenant updated on arrival times.
3. **Job close-out**
   Checks completion photos and signatures before closing a job, then asks the tenant for feedback.
4. **SLA tracking**
   Watches response and fix times against each contract and escalates jobs that are about to breach.

B Maintenance & Assets

1. **Planned maintenance**
   Schedules PPM tasks per asset and manufacturer guidance and issues job cards to the right team.
2. **Equipment monitoring**
   Predictive AI reads BMS and sensor data to flag chillers, pumps and lifts that are likely to fail.
3. **Spare parts stock**
   Tracks parts used on each job and raises reorders before critical spares run out on site.
4. **Specialist contractor visits**
   Books specialist contractors, checks their permits and records each visit against the asset.

C Soft Services & Compliance

1. **Cleaning & security rosters**
   Plans rosters around occupancy and events, and reassigns cover when staff are absent on shift.
2. **Site inspections**
   Turns inspection checklists and photos into scored reports with actions assigned to named owners.
3. **Safety certificates**
   Tracks fire, lift and life-safety certificates and books renewals well before they expire.
4. **Energy monitoring**
   Spots unusual energy and water use by building or floor and suggests where engineers should look first.

D Leasing & Accounts

1. **Service charge billing**
   Calculates service charges and utility recharges per unit and issues VAT-ready invoices on time.
2. **Rent collection**
   Sends rent reminders and payment links, posts receipts and flags arrears to the property manager.
3. **Lease renewals**
   Tracks lease expiries, drafts renewal offers and records each tenant's decision for the owner.
4. **Vendor invoices**
   Matches contractor invoices to completed work orders and contract rates before releasing payment.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

07:00 — Night requests are logged and the first technicians are already assigned.

09:30 — A chiller trending toward failure has been flagged and a PPM job raised.

12:00 — Jobs closed this morning carry photo proof and tenant feedback attached.

15:00 — The certificate tracker has booked a lift inspection due for renewal soon.

18:00 — Owners receive a dashboard of SLAs, open jobs, arrears and energy use.

Signature AI solutions

BUILT FOR REAL ESTATE

CHAT ASSISTANT

Tenant Helpdesk Assistant

Arabic and English assistant on WhatsApp, app and phone that logs requests with photos, answers queries and updates tenants on jobs.

AI AGENT

Smart Dispatch Agent

Creates work orders, assigns technicians by skill and location, tracks SLAs and closes jobs only with photo and signature proof.

PREDICTIVE AI

Asset Health Predictor

Reads BMS, meter and maintenance history to predict failures, prioritise PPM and reduce emergency call-outs across the portfolio.

WORKFLOW AUTOMATION

Service Charge Engine

Calculates service charges and recharges, issues invoices, chases rent and reconciles receipts in the accounting system.

Systems we integrate with

- CAFM/CMMS (IBM Maximo, Planon)
- Property mgmt (Yardi, MRI Software)
- Building management systems
- IoT sensors & smart meters
- WhatsApp Business API
- Accounting (SAP, Zoho Books, Xero)
- Telephony & IVR
- Access control & visitor systems

Customised to each client

1. Load each contract's SLAs, scope and penalty rules so dispatch and escalation follow them exactly.
2. Map the client's asset register, PPM schedules and job codes into the CAFM workflows.
3. Serve tenants in Arabic, English and other languages under the client's or the building's brand.
4. Set approval limits for spend, call-outs and subcontractor jobs by building or portfolio.
5. Choose which BMS points and sensors feed the predictions and who receives each alert.

Business outcomes

Faster fixes
Requests are logged and dispatched at once, so jobs start sooner.

Fewer breakdowns
Equipment issues are caught early and handled as planned work instead.

Proof for every job
Photos, signatures and timestamps back every invoice and SLA report.

Happier tenants
Tenants are updated at each step and rarely need to chase anyone.

START HERE · 30-DAY PILOT

WhatsApp helpdesk and dispatch for one building

1 **WEEK 1** — Map request types, SLAs, technician skills and the current CAFM workflow with the FM team.

2 **WEEK 2** — Configure the bilingual assistant and dispatch rules, then test them on past tickets.

3 **WEEK 3** — Launch to tenants of one building beside the helpdesk, refining routing every day.

4 **WEEK 4** — Review response times, job proof and tenant feedback, then add PPM and predictions.

Architecture, Engineering & Interior Design

From brief to handover, AI that keeps drawings, RFIs and fee claims moving.

INDUSTRY OVERVIEW

Design studios juggle client briefs, drawing revisions, consultant coordination, site visits and fee invoicing across many live projects at once. Architects lose hours to RFIs, transmittals, minutes, BOQs and timesheets instead of design. AI reads drawings and specs, drafts the paperwork, tracks every revision and chases approvals, so designers get back to designing.

AUTOMATION POTENTIAL

IMPLEMENTATION Medium

TYPICAL DECISION MAKERS

- Managing Partner
- Principal Architect
- Director of Operations

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Briefs & Proposals

1. **Client brief intake**
   Chat assistant captures scope, area, budget band and style preferences, then drafts a structured brief.
2. **Fee proposal drafting**
   GenAI drafts fee proposals and scope letters stage by stage from past projects, for partner sign-off.
3. **Tender & RFP responses**
   Assembles the practice profile, relevant project sheets and CVs into a tailored submission pack.
4. **Enquiry follow-up**
   Agents follow up website and referral enquiries, book consultations and log each lead in the CRM.

B Design Documentation

1. **Drawing register upkeep**
   Reads title blocks across issued sheets and updates the drawing register and revision history.
2. **Transmittals & issues**
   Drafts transmittals, logs every issue to consultants and contractors and records acknowledgements.
3. **Specification writing**
   GenAI drafts outline specifications from the model and the practice's own standard clause library.
4. **Code & standards checks**
   Knowledge assistant answers fire, accessibility and authority questions with the source clause cited.

C Project Coordination

1. **RFI management**
   Logs incoming RFIs, drafts responses from current drawings and specs, and tracks each one to closure.
2. **Meeting minutes**
   Transcribes design and site meetings, writes the minutes and assigns actions to each consultant.
3. **Site visit reports**
   Turns site photos and voice notes into a formatted observation report with snag references.
4. **Authority approvals**
   Tracks permit and NOC submissions and comments, alerting project leads before deadlines slip.

D Interiors, Costs & Fees

1. **FF&E schedules**
   Builds furniture and finishes schedules from the design model with codes, suppliers and lead times.
2. **Quantity take-off**
   Extracts quantities from drawings into a draft bill of quantities for the cost consultant to check.
3. **Supplier quotations**
   Reads supplier quotes, compares them line by line and flags gaps in specification or lead time.
4. **Timesheets & stage invoices**
   Reconciles timesheets to project stages and raises stage invoices as each milestone is reached.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

07:30 — Every drawing issued yesterday is logged in the register, transmittals sent.

09:00 — Project leads open a digest of RFIs due, approvals pending and client comments.

11:30 — Minutes from the morning design review are out, actions assigned to consultants.

15:00 — Supplier quotes for the lobby fit-out sit side by side, gaps already flagged.

18:00 — Timesheets are matched to stages and draft invoices await partner approval.

Signature AI solutions

BUILT FOR REAL ESTATE

AI AGENT

RFI & Transmittal Agent

Logs RFIs and transmittals from email and the common data environment, drafts answers from current drawings and keeps every revision traceable.

GENAI CONTENT

Spec & Proposal Writer

Drafts fee proposals, scope letters and outline specifications from the practice's own templates, clause library and past projects.

COMPUTER VISION

Site Report Assistant

Turns site photos and voice notes into tagged observation reports and snag lists, each linked to the right drawing, level and room.

KNOWLEDGE ASSISTANT

Studio Knowledge Assistant

Answers questions on design standards, codes and past projects from the practice's own library, citing the source sheet or clause.

Systems we integrate with

- Autodesk Revit & AutoCAD
- Autodesk Construction Cloud
- Bluebeam Revu
- SketchUp & Rhino
- Practice management (Deltek)
- Accounting (Xero, Zoho Books, Tally)
- Microsoft 365 & SharePoint
- WhatsApp Business API

Customised to each client

1. Load the studio's own title blocks, drawing numbering and revision conventions into every agent.
2. Train the knowledge assistant on the practice's standard details, specs and local authority rules.
3. Set which documents go to clients or contractors automatically and which need partner sign-off.
4. Match fee stages, invoice formats and timesheet codes to the firm's existing accounting setup.
5. Keep project files in the practice's own cloud tenancy, with access mirrored from project teams.

Business outcomes

No lost RFIs
Every query is logged, answered and closed, with nothing buried in an inbox.

More time to design
Architects and designers spend their days on design work, not on paperwork.

Cleaner revision control
Everyone works from the current drawing, backed by a full issue history.

Faster fee recovery
Stage invoices go out as milestones are reached, not when someone remembers.

START HERE · 30-DAY PILOT

Automate RFIs and transmittals on one live project

1 **WEEK 1** — Map the project's RFI, transmittal and drawing-issue process with the project lead.

2 **WEEK 2** — Connect the agent to the shared inbox, CDE and drawing register on a test folder.

3 **WEEK 3** — Run alongside the team, review every drafted response and tune the routing rules.

4 **WEEK 4** — Go live on the project, review the effort saved and choose the next workflow.

05

SECTOR 05 OF 11

Retail, Consumer & Automotive

Every customer, every product line, every service visit: AI answers, forecasts and follows up at scale.

INDUSTRIES IN THIS SECTOR

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Retail Chains & Supermarkets

Fuller shelves, sharper prices and less waste – AI for every store in the chain.

INDUSTRY OVERVIEW

Supermarkets and retail chains run on thin margins and high volume: daily replenishment orders, price changes, promotions, supplier deliveries, shift rosters and customer queries across many stores. Much of it is planned in spreadsheets and chased by phone. AI forecasts demand by store, raises orders, checks shelves and answers shoppers, so managers can run the floor.

AUTOMATION POTENTIAL ●●●●●

IMPLEMENTATION Medium

TYPICAL DECISION MAKERS

- Chief Operating Officer
- Head of Supply Chain
- Head of Store Operations

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Replenishment & Inventory

1. **Store reorder planning**
   Forecasts demand by store and SKU from sales, season and promotions, then proposes the daily order.
2. **Fresh & perishables**
   Predicts wastage on fresh lines and suggests markdowns or transfers before products expire.
3. **Supplier deliveries**
   Document AI reads delivery notes, matches them to purchase orders and flags short or damaged items.
4. **Stock counts & shrinkage**
   Flags unusual stock gaps by store and line so loss-prevention teams know where to count first.

B Store Operations

1. **Shelf & planogram checks**
   Computer vision reads shelf photos, spots gaps and misplaced items, and raises tasks for staff.
2. **Shelf price labels**
   Checks shelf labels against the price file after each change and lists stores still to update.
3. **Shift rostering**
   Builds rosters around forecast footfall, staff availability and labour rules for each store.
4. **Store task lists**
   Turns head-office instructions into daily checklists for each store and tracks completion.

C Pricing & Promotions

1. **Competitor price checks**
   Gathers competitor shelf and online prices for key lines and flags where the chain is out of line.
2. **Promotion planning**
   Predicts uplift and cannibalisation for planned offers so category teams back the right deals.
3. **Supplier promo claims**
   Reconciles promotional funding and rebates owed by suppliers against actual scanned sales.
4. **Weekly flyer content**
   GenAI drafts flyer copy, shelf talkers and social posts in Arabic and English from the promo plan.

D Shoppers & Loyalty

1. **Shopper queries**
   Chat assistant answers store hours, stock, delivery and returns questions on WhatsApp and web.
2. **Loyalty offers**
   Segments loyalty members by basket habits and sends personalised offers through the app.
3. **Online order picking**
   Sequences click-and-collect and delivery picks by aisle and agrees substitutions with shoppers.
4. **Complaints & feedback**
   Classifies reviews and complaints by store and theme and routes each one to the right manager.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

05:30 — Fresh orders for every store are raised from overnight sales and forecasts.

08:00 — Store managers start with a task list built from opening shelf-photo checks.

11:00 — Morning deliveries are matched to orders; shortages are already claimed.

15:30 — Markdown suggestions arrive for fresh lines unlikely to sell before closing.

21:00 — Sales, waste and stock roll into tomorrow's forecast and regional dashboards.

Signature AI solutions

BUILT FOR RETAIL

PREDICTIVE AI

Store Replenishment AI

Forecasts demand by store, SKU and day, allowing for promotions, holidays and weather, and raises orders within buyer-set limits.

COMPUTER VISION

Shelf Vision Checker

Reads photos from staff phones or fixed cameras to find empty facings, wrong prices and planogram breaks, then assigns the fixes.

CHAT ASSISTANT

Shopper WhatsApp Assistant

Answers stock, store, delivery and loyalty questions in Arabic and English, and hands complex cases to customer service.

DOCUMENT AI

Supplier Invoice Matcher

Reads supplier invoices and delivery notes, three-way matches them against orders and receipts, and queues only the disputes.

Systems we integrate with

- ERP (SAP, Microsoft Dynamics 365)
- POS (LS Retail, Oracle Retail)
- Warehouse management systems
- Loyalty and CRM platforms
- E-commerce (Shopify, Magento)
- WhatsApp Business API
- Workforce scheduling tools
- BI (Power BI, Tableau)

Customised to each client

1. Set order limits, minimum stock rules and supplier lead times by store format and category.
2. Train shelf-vision models on the chain's own planograms, packaging and fixture layouts.
3. Run the shopper assistant in Arabic, English and the other languages the chain's customers use.
4. Choose which price, order and markdown decisions go live automatically and which need approval.
5. Write every customer message, flyer and offer in the chain's own tone and loyalty branding.

Business outcomes

Fuller shelves
Gaps are spotted and refilled before shoppers notice something is missing.

Less fresh waste
Perishables are ordered closer to real demand and marked down in good time.

Cleaner supplier claims
Short deliveries and unpaid promotional funding are caught and claimed.

Managers on the floor
Store managers spend more time with shoppers and staff, less on spreadsheets.

START HERE · 30-DAY PILOT

Automate fresh replenishment for a cluster of stores

1 **WEEK 1** — Review current ordering, waste and delivery data for the chosen stores and categories.

2 **WEEK 2** — Train the forecast on store history and set order rules with buyers and store managers.

3 **WEEK 3** — Run AI orders in parallel with manual orders and compare availability and waste daily.

4 **WEEK 4** — Switch the stores to AI-led orders with approval, then plan roll-out to more stores.

E-commerce & D2C Brands

AI that keeps the online store listing, shipping and answering around the clock.

INDUSTRY OVERVIEW

Online brands live in a constant loop of product listings, marketplace feeds, ad campaigns, order queues, courier exceptions, returns and where-is-my-order tickets. Small teams copy data between the store, marketplaces, couriers and spreadsheets all day. AI agents write listings, answer shoppers, rescue failed deliveries, reconcile payouts and warn before a sell-out.

AUTOMATION POTENTIAL ●●●●●

IMPLEMENTATION Low

TYPICAL DECISION MAKERS

- Founder / CEO
- Head of E-commerce
- Head of Customer Experience

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Catalogue & Listings

1. **New product listings**
   GenAI writes titles, descriptions and bullet points per channel from the spec sheet and brand voice.
2. **Marketplace feed upkeep**
   Keeps prices, stock and attributes in sync across the website and marketplaces, flagging rejects.
3. **Product image prep**
   Removes backgrounds, resizes images and checks each one against the marketplace's listing rules.
4. **SEO & content updates**
   Drafts category copy, FAQs and meta tags, and refreshes pages that are losing search visibility.

B Orders & Fulfilment

1. **Order verification**
   Scores orders for fraud and cash-on-delivery risk and confirms risky ones on WhatsApp before dispatch.
2. **Courier exceptions**
   Tracks every shipment and resolves delays, failed attempts and address issues with the customer.
3. **Returns & exchanges**
   Approves returns within policy, books reverse pickups and offers an exchange or store credit first.
4. **Stock & reorder alerts**
   Forecasts sell-through by SKU and warns before bestsellers run out or slow lines start to pile up.

C Customer Support

1. **Where-is-my-order queries**
   Chat assistant pulls live tracking and answers order-status questions on chat, email and WhatsApp.
2. **Pre-sale questions**
   Answers sizing, ingredient, compatibility and delivery questions from the catalogue and FAQs.
3. **Refund requests**
   Checks order history and policy, issues eligible refunds and escalates disputes with full context.
4. **Reviews & ratings**
   Drafts replies to reviews, routes product complaints to the team and invites happy buyers to review.

D Growth & Payouts

1. **Ad performance checks**
   Reviews ad spend and returns daily and flags campaigns or audiences that are wasting budget.
2. **Email & SMS flows**
   GenAI drafts abandoned-cart, win-back and launch messages, segmented by purchase behaviour.
3. **Payout reconciliation**
   Matches gateway, marketplace and cash-on-delivery remittances to orders and lists every short payment.
4. **Creator campaigns**
   Tracks creator briefs, product seeding, post dates and code redemptions, and chases late posts.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

07:00 — Overnight orders are fraud-checked and risky COD orders confirmed on WhatsApp.

09:30 — Last night's courier exceptions already have customer replies and new slots.

12:00 — New arrivals go live with channel-ready copy and images on every marketplace.

16:00 — Ad review flags weak campaigns and suggests where to move the budget.

22:00 — Payouts are reconciled and tomorrow's stock alerts land in the founder's inbox.

Signature AI solutions

BUILT FOR RETAIL

CHAT ASSISTANT

Store Support Agent

Resolves order status, returns, sizing and refund questions on chat, email and WhatsApp, acting in the store within the brand's policies.

GENAI CONTENT

Listing Studio

Generates channel-specific titles, descriptions, images and attributes for every marketplace from one master product record.

AI AGENT

Delivery Rescue Agent

Watches courier tracking, contacts customers about failed or delayed deliveries and re-books attempts before a parcel returns.

PREDICTIVE AI

Demand & Stock Forecaster

Forecasts sell-through by SKU and channel, flags stock-out and overstock risk, and drafts purchase orders for approval.

Systems we integrate with

- Shopify & WooCommerce
- Marketplaces (Amazon, Flipkart, Noon)
- Payment gateways (Stripe, Razorpay)
- Shipping (Shiprocket, Aramex)
- Helpdesk (Gorgias, Zendesk)
- Klaviyo & email platforms
- Meta & Google Ads
- WhatsApp Business API

Customised to each client

1. Write every listing, reply and campaign in the brand's own voice, banned words and style rules.
2. Set the refund, return and goodwill limits the agent may grant before a human must approve.
3. Support the languages and channels the brand's shoppers use, from WhatsApp to Instagram DMs.
4. Map each marketplace's category rules, attributes and image specs into the listing workflow.
5. Choose risk thresholds for COD confirmation, fraud holds and courier allocation by region.

Business outcomes

Faster answers
Shoppers get a clear reply on the channel they chose, at any hour of the day.

Fewer failed deliveries
Delivery problems are fixed with the customer before parcels head back.

Quicker launches
New products go live on every channel without days of copy and image work.

Clear margins
Payouts, fees and returns are reconciled order by order, not by guesswork.

START HERE · 30-DAY PILOT

Automate order-status and returns support for one store

1 — WEEK 1
Review ticket history, return policy and courier data to map the most common requests.

2 — WEEK 2
Connect the assistant to the store, courier and helpdesk, then test on past tickets.

3 — WEEK 3
Handle live chats with agents approving replies, then tune tone and escalation rules.

4 — WEEK 4
Let the assistant resolve routine tickets on its own and choose the next workflow.

Jewellery, Fashion & Luxury Retail

AI that knows every client, piece and price, so boutiques can sell with care.

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INDUSTRY OVERVIEW

Jewellers, fashion houses and luxury boutiques sell through relationships: clienteling, private appointments, made-to-order pieces, alterations and repairs, each tracked by hand. Behind the counter sit daily gold-rate updates, certificate records, memo stock and season-end markdowns. AI keeps client books current, tracks every piece and drafts the personal follow-up.

AUTOMATION POTENTIAL

IMPLEMENTATION Medium

TYPICAL DECISION MAKERS

- Managing Director
- Head of Retail
- Head of Clienteling & CRM

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Clienteling & Sales

1. **Client book follow-ups**
   Reminds advisors of birthdays, anniversaries and wish-list arrivals, with a drafted personal note.
2. **Appointment booking**
   Books private viewings and trials over WhatsApp, pairing each client with their usual advisor.
3. **Collection launches**
   GenAI drafts invitations and lookbook messages tailored to each client's past purchases.
4. **Enquiry handling**
   Answers price, availability and sizing questions in Arabic and English, then hands to an advisor.

B Jewellery Operations

1. **Daily gold-rate pricing**
   Reprices weight-based pieces from the day's gold rate and making charges across store and web.
2. **Repairs & resizing**
   Logs each repair with photos, tracks it through the workshop and updates the client at every stage.
3. **Custom orders**
   Captures design briefs, sketches and approvals, then tracks the piece from workshop to collection.
4. **Certificates & hallmarks**
   Document AI reads grading certificates and hallmark details and links them to each stock item.

C Fashion Merchandising

1. **Size & style allocation**
   Forecasts demand by store, size and colour and proposes the initial allocation and transfers.
2. **Alterations tracking**
   Logs alteration tickets, schedules tailors and messages clients as soon as garments are ready.
3. **Markdown planning**
   Predicts sell-through by style and suggests markdown timing that protects full-price margin.
4. **Product content**
   GenAI writes product descriptions, care notes and styling copy in the house's own voice.

D Stock & Loss Control

1. **Daily stock tallies**
   Reconciles opening and closing counts of high-value pieces and flags any mismatch at once.
2. **Memo & consignment stock**
   Tracks pieces on memo from suppliers or out with clients and chases returns before due dates.
3. **Return condition checks**
   Computer vision compares returned items with sale-time photos to spot swaps, wear or damage.
4. **Supplier invoices**
   Reads supplier bills with weights, purity and stone details and matches them to goods received.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

09:00 — Today's gold rate is applied to every weight-priced piece in store and online.

10:30 — Advisors open their client books with follow-ups and drafted messages ready.

13:00 — Clients with repairs ready have been messaged and collection slots are booked.

17:00 — Private preview invitations for the new collection await advisor review.

21:30 — Closing tally of high-value pieces is reconciled and signed off digitally.

Signature AI solutions

BUILT FOR RETAIL

KNOWLEDGE ASSISTANT

Clienteling Copilot

Gives every advisor a live view of each client's purchases, sizes and occasions, with suggested pieces and a drafted personal message.

CHAT ASSISTANT

Boutique WhatsApp Concierge

Answers enquiries, shares images and prices, books appointments and sends repair updates in the boutique's tone, around the clock.

WORKFLOW AUTOMATION

Repair & Order Tracker

Tracks repairs, resizing, alterations and custom pieces from intake photo to collection, with client updates at every stage.

PREDICTIVE AI

Assortment Forecaster

Forecasts demand by store, size and style, plans allocations and transfers, and times markdowns to protect full-price sales.

Systems we integrate with

- ERP (SAP, Dynamics 365, Odoo)
- Retail POS (LS Retail)
- Jewellery ERP & gold-rate feeds
- CRM (Salesforce, Zoho CRM)
- E-commerce (Shopify, Magento)
- WhatsApp Business API
- Accounting (Tally, Zoho Books)
- Instagram & Meta Business Suite

Customised to each client

1. Apply the house's own pricing formula for gold rate, making charges, stones and taxes on each piece.
2. Write every client message in the brand's voice and in the languages each client prefers.
3. Set which discounts, holds and approvals advisors can offer before a manager must sign off.
4. Keep client data in the brand's own cloud, with access restricted by store and by advisor.
5. Map the house's repair, alteration and custom-order stages, workshops and promised timelines.

Business outcomes

Warmer client care
Every client hears from their advisor at the right moment, in a personal tone.

Tighter stock control
High-value pieces, memo stock and repairs are accounted for at all times.

Fewer pricing errors
Rate-linked prices update everywhere at once, with no manual recalculation.

More full-price sales
Allocation and markdown decisions follow real demand by store and size.

START HERE · 30-DAY PILOT

Launch clienteling and repair updates in one boutique

1 — WEEK 1
Map the boutique's client book, repair process and messaging habits with the store team.

2 — WEEK 2
Load client and stock data, set the brand voice and configure the WhatsApp templates.

3 — WEEK 3
Advisors use drafted follow-ups and repair updates daily while the team tunes the tone.

4 — WEEK 4
Review client responses and staff feedback, then plan the roll-out to other boutiques.

Automobile Dealerships & Service Centres

From first enquiry to every service visit, AI that keeps the dealership moving.

INDUSTRY OVERVIEW

Two-wheeler and four-wheeler dealers handle a steady stream of walk-ins, online leads, test drives, finance files, insurance renewals, service bookings and workshop job cards every day. Leads go cold in notebooks, service reminders slip and parts arrive late. AI answers every enquiry, books test drives and services, builds job cards and chases each follow-up.

AUTOMATION POTENTIAL ●●●●●

IMPLEMENTATION ▬▬▭ Medium

TYPICAL DECISION MAKERS

- Dealer Principal
- General Manager – Sales
- After-Sales Manager

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Sales & Test Drives

1. **Lead response**
   Replies to website, marketplace and call-centre leads within minutes and qualifies budget and model.
2. **Test ride & drive booking**
   Books test rides and drives on WhatsApp, checks demo vehicle availability and sends reminders.
3. **Quotations & offers**
   Drafts on-road quotes with accessories, exchange value and current schemes for manager approval.
4. **Booking-to-delivery updates**
   Keeps buyers updated from booking through allocation, registration and delivery-day handover.

B Service & Workshop

1. **Service reminders**
   Predicts due dates from mileage and last visit, then invites owners to book a convenient slot.
2. **Service bookings**
   Voice and WhatsApp agents book slots, offer pick-up and drop, and balance the load across bays.
3. **Job card creation**
   Builds the job card from the advisor's walk-around notes, photos and the customer's complaints.
4. **Extra work approvals**
   Sends additional-work estimates with photos to the customer and records approval on the job card.

C Spare Parts

1. **Parts demand planning**
   Forecasts fast-moving parts from service bookings and history and suggests the daily order.
2. **Parts checks for jobs**
   Checks stock for booked jobs a day ahead and raises orders or transfers for any missing parts.
3. **Counter & retail enquiries**
   Answers parts price and availability questions from mechanics and retail buyers on WhatsApp.
4. **Warranty claims**
   Document AI assembles job cards, photos and part numbers into warranty claims ready to submit.

D Finance, Insurance & CX

1. **Loan file collection**
   Collects KYC and income documents, checks completeness and shares files with partner lenders.
2. **Insurance renewals**
   Reminds owners before policies lapse, fetches renewal quotes and books inspections where needed.
3. **Post-delivery follow-up**
   Calls or messages owners after delivery and service to capture feedback and fix issues early.
4. **Exchange & upgrade offers**
   Spots owners nearing an upgrade or warranty end and invites them for an exchange valuation.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

08:00 — Workshop opens with parts checked for every booked job and job cards pre-filled.

09:30 — Overnight online leads have replies, and afternoon test drives are booked.

12:00 — Owners have approved extra work on WhatsApp, with photos on each job card.

15:30 — Loan files for today's bookings are complete and shared with partner lenders.

19:00 — Delivery and service feedback calls are done; unhappy owners are flagged.

Signature AI solutions

BUILT FOR RETAIL

AI AGENT

Showroom Lead Agent

Answers every enquiry on web, WhatsApp and phone, qualifies the buyer, books test drives and keeps each lead warm until booking.

VOICE AI

Service Booking Voice Agent

Calls owners due for service, books slots in Arabic, English or Hindi, confirms pick-up and drop, and updates the DMS.

DOCUMENT AI

Job Card Assistant

Turns advisor notes, photos and complaints into structured job cards, estimates and warranty claims ready for the workshop.

PREDICTIVE AI

Parts Demand Forecaster

Forecasts parts needs from bookings, vehicles in operation and history, and proposes daily orders and inter-branch transfers.

Systems we integrate with

- DMS (CDK Global, Keyloop)
- OEM dealer portals
- CRM (Salesforce, Zoho CRM)
- Lead marketplaces & web forms
- Lender and insurer partner portals
- Accounting (Tally, SAP Business One)
- WhatsApp Business API
- Cloud telephony & IVR

Customised to each client

1. Load the brand's models, variants, schemes and on-road pricing rules for each branch.
2. Match the workshop's bays, technician skills, labour times and service packages.
3. Speak to owners in the languages they prefer, using the dealership's own name and tone.
4. Set which discounts, goodwill gestures and extra work need manager approval first.
5. Connect to the OEM's DMS and portals by API, or by screen automation where no API exists.

Business outcomes

No lead left cold
Every enquiry gets a quick reply and a clear next step towards a test drive.

Fuller workshop bays
Timely reminders and easy booking bring owners back for scheduled service.

Faster job turnaround
Parts are ready and approvals arrive before the vehicle reaches the bay.

Loyal owners
Follow-ups, renewals and upgrade offers keep customers with the dealership.

START HERE · 30-DAY PILOT

Automate service reminders and bookings for one workshop

1 — WEEK 1
Review service history, booking channels and bay capacity with the after-sales team.

2 — WEEK 2
Connect the voice and WhatsApp agents to the DMS and test them with a sample of owners.

3 — WEEK 3
Run live reminders and bookings with advisors watching, then tune scripts and slots.

4 — WEEK 4
Go live for all due owners, review show-ups and choose the next process, such as leads.

Car Rental, Leasing & Fleet Operators

AI that books, inspects, bills and services every vehicle across the fleet.

INDUSTRY OVERVIEW

Rental and leasing companies live on vehicle availability: bookings, handover inspections, damage claims, traffic fines, tolls, servicing and registration renewals for every car in the fleet. Teams juggle booking tools, telematics, spreadsheets and phone calls. AI takes reservations, reads damage from photos, matches fines and tolls to contracts and plans servicing early.

AUTOMATION POTENTIAL ●●●●●

IMPLEMENTATION ▬▬▭ Medium

TYPICAL DECISION MAKERS

- Chief Operating Officer
- Head of Fleet
- Head of Rentals & Leasing

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Reservations & Counter

1. **Booking enquiries**
   Chat and voice agents quote rates, check availability and confirm bookings in Arabic and English.
2. **Driver document checks**
   Document AI reads licences, passports and IDs at booking and flags expired or invalid documents.
3. **Deliveries & collections**
   Schedules vehicle drop-offs and collections, assigns drivers and updates customers on arrival.
4. **Rental extensions**
   Handles extension requests, re-checks availability and updates the contract and the deposit.

B Damage & Inspections

1. **Check-out inspections**
   Computer vision records each vehicle's condition from walk-around photos taken at handover.
2. **Return damage checks**
   Compares return photos with check-out images and marks new damage with location and severity.
3. **Damage charges**
   Drafts damage reports and repair estimates and shares them with the customer for agreement.
4. **Insurance claims**
   Assembles photos, police reports and contracts into insurance claim files and tracks each one.

C Fines, Tolls & Billing

1. **Traffic fine matching**
   Matches each traffic fine to the right contract and driver by plate and time, then bills it.
2. **Toll charges**
   Reconciles toll transactions against rental periods and adds them to the customer's invoice.
3. **Lease invoicing**
   Raises monthly lease invoices with mileage, extras and VAT, and chases late payments politely.
4. **Deposit releases**
   Checks for open fines, tolls and damage before releasing each deposit on its scheduled date.

D Fleet & Maintenance

1. **Service scheduling**
   Predicts service due dates from telematics mileage and books workshop slots before deadlines.
2. **Registration & insurance**
   Tracks registration, insurance and permit expiries and starts every renewal in good time.
3. **Utilisation planning**
   Forecasts demand by branch and vehicle category and suggests transfers or defleet decisions.
4. **Telematics alerts**
   Filters speeding, idling and geofence alerts from telematics and escalates the genuine risks.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

06:30 — Vehicles due back today are pre-checked for open fines, tolls and damage.

08:00 — Drivers have their delivery routes; customers have arrival times on WhatsApp.

11:00 — Returned vehicles are photo-checked; new damage reports await customer sign-off.

14:00 — Last week's traffic fines are matched to contracts and added to invoices.

18:30 — Tomorrow's fleet plan is ready, with services booked and transfers suggested.

Signature AI solutions

BUILT FOR RETAIL

CHAT ASSISTANT

Rental Booking Assistant

Quotes, books and extends rentals on web and WhatsApp, verifies driver documents and writes every booking into the rental system.

COMPUTER VISION

Vehicle Damage Inspector

Compares check-out and return photos to detect new scratches and dents, then drafts the damage report with images and location.

WORKFLOW AUTOMATION

Fines & Tolls Reconciler

Matches traffic fines and toll records to contracts and drivers by plate and time, then bills customers or flags disputes.

PREDICTIVE AI

Fleet Health Planner

Uses telematics, mileage and booking forecasts to plan servicing, renewals, transfers and defleeting before vehicles go off-road.

Systems we integrate with

- Rental management software
- Telematics (Geotab, Samsara)
- ERP (SAP, Microsoft Dynamics 365)
- Accounting (Zoho Books, QuickBooks)
- Payment gateways & card terminals
- Insurer partner systems
- WhatsApp Business API
- Workshop & maintenance systems

Customised to each client

1. Load the company's rate cards, deposit rules, mileage limits and driver age or licence policies.
2. Set how strictly damage is graded and which charges go to a supervisor before billing.
3. Map fine and toll sources for each country or emirate to the company's billing and dispute flow.
4. Run booking assistants in the languages and channels the company's renters actually use.
5. Plug into the existing telematics, workshop and accounting stack without replacing any of it.

Business outcomes

Fewer damage disputes
Photo evidence from both ends of the rental settles disagreements quickly.

No unbilled fines
Every fine and toll reaches the right contract and the right invoice.

More time on the road
Vehicles are serviced, renewed and moved before they sit idle in a yard.

Easier bookings
Renters book, extend and get answers on chat at any hour of the day.

START HERE · 30-DAY PILOT

Automate damage checks and fines billing at one branch

1 — WEEK 1
Map handover, return, damage and fines processes with the branch and finance teams.

2 — WEEK 2
Configure photo capture and fines matching on the branch's recent contracts and records.

3 — WEEK 3
Run checks alongside staff inspections and manual billing, then tune damage grading.

4 — WEEK 4
Go live at the branch, review disputes and recoveries, and choose the next branch.

Salons, Spas & Fitness Centres

Full diaries, fewer no-shows and members who stay – AI for salons, spas and gyms.

INDUSTRY OVERVIEW

Salons, spas and gyms run on appointments, class schedules, memberships and repeat visits. Front desks spend the day answering calls and DMs, juggling stylist and trainer rosters, chasing no-shows, renewing memberships and tracking product stock. AI books and reschedules clients on WhatsApp and Instagram, fills cancellations, nudges lapsing members and balances rotas.

AUTOMATION POTENTIAL ●●●●○

IMPLEMENTATION Low

TYPICAL DECISION MAKERS

- Owner / Managing Director
- Operations Manager
- Head of Membership & Sales

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Bookings & Front Desk

1. **Appointment booking**
   Books, moves and cancels appointments on WhatsApp, Instagram and phone, matching the right stylist.
2. **No-show prevention**
   Sends confirmations and reminders, takes deposits where required and releases unconfirmed slots.
3. **Cancellation fill-ins**
   Offers freed slots to the waitlist and to regulars who prefer that time or that therapist.
4. **Price & service queries**
   Answers questions on treatments, prices, packages and preparation in the client's own language.

B Memberships & Retention

1. **Membership renewals**
   Reminds members before expiry, offers a suitable renewal plan and sends a secure payment link.
2. **Lapsing client win-back**
   Spots clients and members who have stopped visiting and sends a personal invitation to return.
3. **Trial & lead follow-up**
   Follows up trial sessions and walk-in enquiries and books a consultation with a trainer or therapist.
4. **Reviews & feedback**
   Asks for feedback after each visit, drafts replies to reviews and alerts managers to complaints.

C Staff & Scheduling

1. **Stylist & trainer rotas**
   Builds rotas around forecast bookings, staff skills, leave and break rules for each branch.
2. **Class scheduling**
   Adjusts class timetables and capacity using attendance patterns and waitlist demand.
3. **Commission calculation**
   Calculates service and retail commission for each staff member from booking and POS data.
4. **New staff questions**
   Knowledge assistant answers new staff questions on treatments, hygiene rules and house policies.

D Retail & Back Office

1. **Product stock**
   Tracks back-bar and retail product use per service and suggests reorders before stock runs out.
2. **Supplier orders**
   Drafts supplier orders from usage and sales, then matches invoices to the deliveries received.
3. **Daily cash-up**
   Reconciles POS, card terminal and online payments against the day's bookings and flags gaps.
4. **Offers & social content**
   GenAI drafts seasonal offers, social posts and treatment captions in the brand's own voice.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

07:00 — Overnight DMs and WhatsApp booking requests are confirmed in the diary.

09:00 — Front desk opens to a clean diary: reminders sent, late cancellations refilled.

12:30 — Members whose plans expire this month have renewal offers and payment links.

16:00 — Tomorrow's classes are rebalanced from waitlists and the trainer rota updated.

21:00 — The day's cash-up is reconciled and commission is updated for every stylist.

Signature AI solutions

BUILT FOR RETAIL

CHAT ASSISTANT

Booking Concierge

Handles bookings, changes and questions on WhatsApp, Instagram and web chat around the clock, writing straight into the booking software.

VOICE AI

Front Desk Voice Agent

Answers calls when the desk is busy, books and moves appointments, takes deposits by link and passes complex requests to staff.

AI AGENT

Member Retention Agent

Spots lapsing clients and expiring memberships, sends personal offers and books return visits within the owner's discount rules.

PREDICTIVE AI

Rota & Class Planner

Forecasts demand by day, branch and service, then plans staff rotas and class capacity so supply matches the bookings expected.

Systems we integrate with

- Salon software (Fresha, Zenoti)
- Gym software (Mindbody, Glofox)
- POS & card terminals
- WhatsApp Business API
- Instagram & Meta Business Suite
- Payment links (Stripe, Razorpay)
- Accounting (Zoho Books, Xero)
- Google Business Profile

Customised to each client

1. Load each branch's services, durations, buffer times, prices and which staff can perform them.
2. Set deposit, cancellation and no-show rules exactly as the business applies them today.
3. Use the brand's tone and languages, with separate voices for ladies' and gents' branches if needed.
4. Decide which discounts and package offers the agents may make before a manager approves.
5. Keep client notes, allergies and health forms private, with access limited by staff role.

Business outcomes

Fuller diaries
Gaps left by cancellations are filled quickly from waitlists and regulars.

Fewer no-shows
Confirmations, reminders and deposits keep clients committed to their slots.

Members who stay
Lapsing members hear from the business before they quietly drift away.

Calmer front desk
Staff spend their time welcoming clients instead of answering the phone.

START HERE · 30-DAY PILOT

Launch a WhatsApp booking concierge for one branch

1 — WEEK 1
Map services, staff, booking rules and the most common client questions with the team.

2 — WEEK 2
Connect the assistant to the booking software and WhatsApp, then test it with staff.

3 — WEEK 3
Go live with the front desk approving bookings, then tune replies and reminder timing.

4 — WEEK 4
Let the assistant book on its own, review no-shows and pick the next automation.

SECTOR 06 OF 11

Hospitality, Travel & Food

Guests expect instant replies and flawless service; AI handles bookings, requests and the back office around the clock.

INDUSTRIES IN THIS SECTOR

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Hotels & Resorts

Every guest request, rate and room turn handled faster, from booking to check-out.

INDUSTRY OVERVIEW

Hotels and resorts run around the clock: reservations from many channels, pre-arrival requests, check-ins, housekeeping turns, maintenance tickets, F&B orders, guest messages and the night audit. Front office and reservations teams retype data between the PMS, channel manager and email. AI answers guests, updates rates, routes requests and prepares reports so staff can host.

AUTOMATION POTENTIAL ●●●●●

IMPLEMENTATION ▬▬▭ Medium

TYPICAL DECISION MAKERS

- General Manager
- Director of Revenue
- Director of Rooms Division

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Reservations & Revenue

1. **Booking enquiries**
   Answers rate, room and package questions on web, email and WhatsApp and books directly in the PMS.
2. **Group & event RFPs**
   Reads group requests, checks availability and drafts a proposal with rates and meeting space.
3. **Rate & availability updates**
   Recommends daily rates from pickup, events and competitor prices and pushes them to channels.
4. **OTA reconciliation**
   Matches OTA commissions and virtual card payments to stays and flags missing or wrong charges.

B Front Office & Guests

1. **Pre-arrival messaging**
   Sends pre-arrival messages, collects arrival times and requests, and offers upgrades in advance.
2. **Online check-in**
   Document AI reads passports and IDs, completes registration and has keys ready before arrival.
3. **In-stay guest requests**
   Chat assistant takes requests for towels, late check-out or dining and routes them to the right team.
4. **Reviews & feedback**
   Drafts replies to online reviews and spots repeated complaints by department, outlet or room.

C Housekeeping & Engineering

1. **Room status & assignment**
   Prioritises room cleaning from arrivals, departures and VIPs and updates room status in the PMS.
2. **Maintenance tickets**
   Logs faults reported by staff and guests, assigns engineers and tracks each job to completion.
3. **Preventive maintenance**
   Schedules checks on HVAC, pools and lifts from asset history and alerts on any overdue task.
4. **Lost and found**
   Logs found items with photos and descriptions and matches them to guest enquiries for return.

D F&B & Back Office

1. **Restaurant reservations**
   Takes table bookings across channels, notes guest preferences and confirms each booking.
2. **F&B purchasing**
   Forecasts F&B needs from occupancy and banqueting and drafts purchase orders for approval.
3. **Night audit**
   Runs night audit checks, flags posting errors and prepares the daily flash report for managers.
4. **Invoices & city ledger**
   Reads supplier invoices and chases corporate and travel-agent accounts for overdue payments.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

06:00 — Night audit is closed and the daily flash report is in every manager's inbox.

08:30 — Housekeeping boards show priority rooms for early arrivals and VIP guests.

11:00 — Guests arriving today have checked in online; their keys wait at the desk.

15:00 — Revenue manager reviews rate recommendations for the weekend's city events.

22:00 — Late guest requests are logged and routed; the night team sees every open item.

Signature AI solutions

BUILT FOR HOSPITALITY

CHAT ASSISTANT

Guest Messaging Concierge

Handles pre-arrival, in-stay and post-stay conversations on WhatsApp and web in many languages, routing requests to the right team.

VOICE AI

Reservations Voice Agent

Answers reservation calls, quotes live rates, books rooms in the PMS and hands group or complex requests to the sales team.

PREDICTIVE AI

Revenue Pricing Assistant

Recommends daily rates and restrictions using pickup, events and competitor rates, within the revenue manager's guardrails.

WORKFLOW AUTOMATION

Night Audit & Ops Agent

Runs night audit checks, OTA reconciliations and daily reports, escalating only the discrepancies that need a manager.

Systems we integrate with

- Hotel PMS (Opera, Protel)
- Channel manager (SiteMinder)
- Booking engines & OTAs
- Revenue management systems
- F&B POS (Oracle Simphony)
- Housekeeping & maintenance tools
- Accounting (Infor SunSystems, SAP)
- WhatsApp Business API

Customised to each client

1. Train the concierge on the property's rooms, outlets, packages, policies and local tips.
2. Use the brand's tone and the languages its guests speak, from Arabic and English onwards.
3. Set rate guardrails, upgrade rules and which requests need a duty manager's approval.
4. Map department routing for each property, shift and outlet, including on-call engineers.
5. Host guest data in-region and follow the group's own privacy and data-retention rules.

Business outcomes

Happier guests
Requests are answered quickly, on whichever channel the guest prefers.

More direct bookings
Every enquiry gets a fast, accurate answer that turns into a direct booking.

Smoother room turns
Housekeeping and engineering work from live, prioritised task lists.

Cleaner audits
Night audit, OTA charges and the city ledger are checked every single day.

START HERE · 30-DAY PILOT

Launch WhatsApp guest messaging at one property

1 **WEEK 1** — Map guest journeys, common requests and department routing with the front office team.

2 **WEEK 2** — Connect the concierge to the PMS and WhatsApp and train it on the property's information.

3 **WEEK 3** — Go live with staff reviewing replies and routing, then tune the tone and handovers.

4 **WEEK 4** — Extend to full automation for routine requests and choose the next workflow to automate.

Restaurants, Cloud Kitchens & Catering

Orders, kitchens and catering quotes kept moving while the team cooks.

INDUSTRY OVERVIEW

Restaurants and cloud kitchens juggle delivery-app orders, table bookings, stock counts, prep lists and supplier calls, while catering teams build quotes and event menus by hand. Managers spend late nights reconciling payouts and answering reviews. AI takes over order intake, demand-based prep planning, purchasing, menu costing and guest messaging, so chefs can focus on food.

AUTOMATION POTENTIAL

IMPLEMENTATION Medium

TYPICAL DECISION MAKERS

- Owner / Managing Partner
- Group Operations Manager
- Executive Chef

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Orders & Reservations

1. **Delivery-app order intake**
   Consolidates aggregator orders into one queue, fires them to the kitchen display and flags delays.
2. **Table bookings**
   Chat and voice assistants take bookings on WhatsApp and phone, confirm them and send reminders.
3. **Phone & WhatsApp orders**
   Captures orders in Arabic or English, suggests add-ons and pushes them straight into the POS.
4. **Order issue handling**
   Reads missing-item and late-order complaints, checks the order log and proposes a refund or remake.

B Kitchen & Prep Planning

1. **Daily prep lists**
   Forecasts covers and dish mix from sales history, weather and bookings, then writes station prep lists.
2. **Recipe & menu costing**
   Recalculates plate cost whenever supplier prices change and flags dishes slipping below margin.
3. **Food safety logs**
   Collects fridge temperatures and cleaning checks from sensors and phones, alerting on any missed entry.
4. **Waste logging**
   Computer vision logs discarded food at the bin, showing chefs which items and stations waste most.

C Purchasing & Inventory

1. **Stock counts**
   Turns spoken or photographed counts into stock levels and compares them with theoretical usage.
2. **Supplier ordering**
   Drafts par-level purchase orders per supplier and sends them by email or WhatsApp after approval.
3. **Delivery checking**
   Document AI reads delivery notes and invoices, matching quantities and prices to the purchase order.
4. **Central kitchen transfers**
   Suggests stock transfers between branches and the central kitchen before items reach expiry.

D Catering & Guest Marketing

1. **Catering enquiries**
   Qualifies event enquiries, proposes menus within the client's budget and drafts a costed quote.
2. **Event production sheets**
   Converts a confirmed catering order into prep, packing, staffing and delivery sheets for the team.
3. **Review responses**
   Drafts on-brand replies to Google and delivery-app reviews and escalates serious complaints.
4. **Loyalty campaigns**
   Segments guests by visit pattern and sends personalised offers that win back lapsed regulars.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

07:00
Prep lists for every station are ready, built from today's booking forecast.

10:00
Purchase orders for low items have gone to suppliers after one-tap approval.

13:00
Lunch rush: delivery-app and WhatsApp orders flow into one kitchen queue.

16:00
Catering quotes drafted from today's enquiries await the manager's sign-off.

23:30
Aggregator payouts are reconciled and the sales and waste report is sent.

Signature AI solutions

BUILT FOR HOSPITALITY

AI AGENT
Order Hub Agent
Pulls every delivery-app, website and WhatsApp order into one queue, routes it to the right kitchen and keeps customers updated on status.

VOICE AI
Bookings Voice Host
Answers the restaurant line in Arabic and English, takes reservations and orders, handles changes and hands tricky calls to the floor team.

PREDICTIVE AI
Smart Prep Planner
Forecasts covers and dish mix per outlet, then turns the forecast into prep lists and par-level orders that cut waste and stock-outs.

GENAI CONTENT
Catering Quote Builder
Turns an event brief into menu options, a costed quote and a branded proposal, then creates production sheets once the client confirms.

Systems we integrate with

- Restaurant POS (Foodics, Toast)
- Delivery apps (Talabat, Zomato)
- Bookings (OpenTable, SevenRooms)
- Inventory (MarketMan, Apicbase)
- Kitchen display systems
- Accounting (Zoho Books, Xero)
- WhatsApp Business API
- Google Business Profile

Customised to each client

1. Load the client's own recipes, portion specs and par levels into the prep and ordering agents.
2. Set the refund and remake limits the complaints agent may approve without calling a manager.
3. Match the brand's tone, menu names and languages in every guest message and review reply.
4. Configure separate rules for dine-in outlets, dark kitchens and the central production unit.
5. Choose which suppliers, channels and approval steps each purchase order must pass through.

Business outcomes

Fewer missed orders
Every channel lands in one queue, so orders are not lost between tablets and phones.

Less food waste
Prep and purchasing follow forecast demand rather than habit and guesswork.

Protected margins
Menu costs update with supplier prices, so pricing decisions are made on time.

Happier guests
Bookings, updates and review replies arrive quickly and in the guest's language.

START HERE · 30-DAY PILOT

Automate prep planning and ordering for one outlet

1 **WEEK 1**
Collect sales history, recipes, par levels and supplier lists for the pilot outlet.

2 **WEEK 2**
Configure the demand forecast, prep-list generator and purchase-order drafts.

3 **WEEK 3**
Run alongside the head chef, compare suggestions with actual usage and tune them.

4 **WEEK 4**
Switch to AI-led prep and ordering, review waste and stock-outs, then plan rollout.

Travel Agencies & Tour Operators

Quotes, bookings and traveller care handled while your agents sell journeys.

INDUSTRY OVERVIEW

Travel agencies and tour operators spend the day turning enquiries into itineraries, checking supplier rates, issuing tickets and vouchers, collecting visa documents and answering where-is-my-booking messages. Much of it is copy-paste between GDS screens, supplier portals and WhatsApp. AI drafts quotes, builds documents, tracks changes and cares for travellers at any hour.

AUTOMATION POTENTIAL ●●●●●

IMPLEMENTATION ▬▬▭ Medium

TYPICAL DECISION MAKERS

- Managing Director
- Head of Operations
- Sales & Reservations Manager

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Enquiries & Quotations

1. **Holiday enquiry intake**
   Chat assistant captures dates, travellers, budget band and preferences, then opens a lead in the CRM.
2. **Itinerary building**
   GenAI assembles day-by-day itineraries from contracted hotels, transfers and tours in the system.
3. **Rate checks across suppliers**
   Agents pull live rates from bedbanks and supplier APIs and apply the agency's own markup rules.
4. **Quote follow-up**
   Sends timed follow-ups on WhatsApp and email and alerts the agent when a client reopens the quote.

B Reservations & Ticketing

1. **Booking confirmation**
   Reads supplier confirmations, updates the booking file and spots mismatched names or dates.
2. **Tickets & vouchers**
   Generates branded vouchers, e-ticket summaries and travel packs and sends them in one message.
3. **Schedule changes**
   Watches airline schedule-change alerts, finds affected travellers and proposes rebooking options.
4. **Cancellations & refunds**
   Applies supplier cancellation terms, works out the refund due and drafts the notice to the client.

C Visa & Traveller Care

1. **Visa document collection**
   Document AI checks passports, photos and bank letters against each destination's checklist.
2. **Pre-departure briefings**
   Sends personalised reminders on check-in, documents, weather and meeting points before travel.
3. **In-trip support**
   Bilingual assistant answers transfer, hotel and tour questions at any hour and escalates emergencies.
4. **Post-trip feedback**
   Collects reviews after return, flags service failures to suppliers and invites happy clients back.

D Finance & Supplier Admin

1. **Supplier reconciliation**
   Matches supplier invoices and statements to bookings and flags overcharges or missing credits.
2. **Client payment chasing**
   Reminds clients of deposit and balance deadlines and releases travel documents only once paid.
3. **BSP settlement checks**
   Reconciles airline settlement reports with issued tickets and flags discrepancies for finance.
4. **Hotel contract loading**
   Reads hotel contracts and rate sheets, then loads rooms, seasons and stop-sales into the system.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

07:30 — Overnight schedule changes are matched to bookings, with rebooking options set.

09:30 — Night-time web and WhatsApp enquiries wait as qualified leads with draft quotes.

12:00 — Visa files are pre-checked; only missing or unclear papers go back to clients.

16:00 — Balance reminders have gone out and travel packs are released for paid bookings.

21:00 — The in-trip assistant answers travellers abroad while the office is closed.

Signature AI solutions

BUILT FOR HOSPITALITY

GENAI CONTENT

Itinerary & Quote Studio

Turns a client brief into a priced, branded itinerary using live supplier rates and the agency's markup rules, ready for the agent to send.

CHAT ASSISTANT

Traveller Care Assistant

WhatsApp and web assistant that answers booking, visa and in-trip questions in the traveller's language and hands emergencies to duty staff.

AI AGENT

Disruption Watch Agent

Monitors flight changes and supplier alerts, identifies affected travellers and prepares rebooking options and messages for approval.

DOCUMENT AI

Visa Docs Checker

Reads passports, photos, statements and letters, checks them against destination checklists and tells clients exactly what is missing.

Systems we integrate with

- GDS (Amadeus, Sabre, Travelport)
- Travel CRM & mid-office systems
- Bedbank & supplier APIs
- Payment gateways (Stripe, PayPal)
- WhatsApp Business API
- Accounting (Tally, Zoho Books, Xero)
- Flight status data feeds
- Reviews (Google, Tripadvisor)

Customised to each client

1. Apply the agency's own markup, commission and discount rules per supplier, product and client.
2. Brand itineraries, vouchers and messages with the agency's logo, tone and preferred languages.
3. Load destination visa checklists and the agency's document rules for each nationality served.
4. Decide which rebookings and refunds the AI may action alone and which need a manager's sign-off.
5. Connect to the GDS, bedbanks and mid-office already in use, keeping data in the chosen region.

Business outcomes

Faster quotations
Clients receive a complete, priced itinerary while they are still comparing options.

Calmer disruption days
Affected travellers are found and offered options before they start calling in.

Cleaner supplier accounts
Overcharges and missing credits are caught while they can still be recovered.

Round-the-clock care
Travellers abroad get answers at any hour, with a person ready for emergencies.

START HERE · 30-DAY PILOT

Automate quotes and follow-ups for one holiday desk

1 — WEEK 1
Map the desk's enquiry flow, suppliers, markup rules and quote templates with agents.

2 — WEEK 2
Configure the enquiry assistant, itinerary builder and follow-ups on sample briefs.

3 — WEEK 3
Run on live enquiries with agents approving every quote, then tune pricing and wording.

4 — WEEK 4
Let approved quote types go out automatically, review conversion and pick the next desk.

Events, Exhibitions & Wedding Planners

From first enquiry to final invoice, AI keeps every event detail on track.

INDUSTRY OVERVIEW

Event, exhibition and wedding teams live in inboxes and spreadsheets: answering enquiries, building proposals, chasing vendors, managing guest lists, exhibitor manuals and run sheets, then reconciling costs after the show. Every event brings many moving parts and late changes. AI agents handle coordination, paperwork and guest messaging so planners focus on the experience.

AUTOMATION POTENTIAL

IMPLEMENTATION Low

TYPICAL DECISION MAKERS

- Founder / Managing Director
- Head of Event Operations
- Exhibition Sales Director

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Enquiries & Proposals

1. **Enquiry qualification**
   Chat assistant captures date, venue preference, guest count and style, then books a discovery call.
2. **Proposals & mood boards**
   GenAI drafts proposals with themes, packages and mood boards from the brief and past events.
3. **Venue availability checks**
   Agents request holds from shortlisted venues and track every response and option expiry date.
4. **Quote revisions**
   Rebuilds the costing and proposal each time the client changes headcount, menu or decor.

B Vendor & Production

1. **Vendor briefing**
   Sends each caterer, florist, AV and decor supplier a tailored brief and collects confirmations.
2. **Run sheet updates**
   Keeps the master run sheet in sync and pushes changes to every vendor and crew member at once.
3. **Contracts & deposits**
   Document AI reads vendor contracts, logs payment milestones and alerts before deposits fall due.
4. **Permits & certificates**
   Tracks permits, certificates and insurance per vendor and flags gaps well before event day.

C Guests & Exhibitors

1. **RSVP management**
   Sends invitations, tracks RSVPs, dietary needs and plus-ones, and updates seating plans as replies land.
2. **Guest WhatsApp concierge**
   Answers venue, dress code, timing and travel questions in the guest's language before the event.
3. **Exhibitor onboarding**
   Chases exhibitor forms, stand designs and badge lists, checking each against the exhibitor manual.
4. **Registration & badging**
   Processes registrations, verifies details and issues badges and QR passes for fast entry on arrival.

D Sales, Finance & Wrap-up

1. **Stand & sponsor sales**
   Prioritises leads from past exhibitors and sends tailored stand and sponsorship packages.
2. **Client billing**
   Raises milestone invoices from the signed proposal and reminds clients ahead of each due date.
3. **Event cost reconciliation**
   Matches vendor invoices to quotes and produces a cost-versus-budget summary for each event.
4. **Post-event follow-up**
   Sends thank-you messages, gathers feedback and drafts a recap report with photos and highlights.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

08:00 — Overnight enquiries are qualified, with discovery calls booked into diaries.

10:30 — The client's run sheet changes have reached every vendor and been confirmed.

13:00 — Exhibitors missing stand designs have been chased; complete files are approved.

16:00 — RSVPs and dietary needs are updated and the seating plan refreshed for review.

19:00 — Guest concierge answers last-minute questions while the team finishes set-up.

Signature AI solutions

BUILT FOR HOSPITALITY

GENAI CONTENT

Proposal Studio

Turns a client brief and past events into a costed proposal with themes, packages and mood boards, ready to send in the planner's style.

AI AGENT

Vendor Coordination Agent

Briefs suppliers, collects confirmations and documents, tracks deposits and pushes every run-sheet change so nobody works from an old version.

CHAT ASSISTANT

Guest Concierge

WhatsApp and web assistant that handles RSVPs, dietary needs, directions and timings for guests and exhibitors in their own language.

DOCUMENT AI

Exhibitor Docs Checker

Reads exhibitor forms, stand drawings, insurance and badge lists, checks them against the manual and returns precise correction requests.

Systems we integrate with

- Event platforms (Cvent, Eventbrite)
- Project tools (Asana, Monday.com)
- CRM (HubSpot, Zoho CRM)
- WhatsApp Business API
- Accounting (QuickBooks, Xero, Tally)
- E-signature (DocuSign)
- Badging & access control systems
- Google Workspace & Microsoft 365

Customised to each client

1. Load the planner's packages, supplier panel and pricing rules so proposals match how they sell.
2. Write guest messages in the host's voice and in the languages the guest list actually speaks.
3. Build separate workflows for weddings, corporate events and trade shows, each with its own steps.
4. Set which vendor changes the agent may confirm alone and which need the lead planner's approval.
5. Brand every proposal, invitation, badge and recap with the client's or organiser's own identity.

Business outcomes

Proposals out sooner
Clients see a considered, costed concept while their enthusiasm is still high.

No outdated run sheets
Every vendor and crew member works from the same current plan on the day.

Smoother guest experience
Guests get quick, personal answers, so planners are not buried in messages.

Clear event margins
Costs are reconciled against budget as invoices arrive, not weeks after the show.

START HERE · 30-DAY PILOT

Automate guest and vendor coordination for one event

1 **WEEK 1** — Pick an upcoming event and gather its run sheet, vendor list, guest list and templates.

2 **WEEK 2** — Configure the guest concierge, RSVP tracking and vendor briefing agent on test data.

3 **WEEK 3** — Go live for the event build-up, with planners approving changes and tuning replies.

4 **WEEK 4** — Run event day and wrap-up, review planners' feedback and choose the next event type.

07

SECTOR 07 OF 11

Manufacturing & Industry

Planning, quality, maintenance and compliance: AI turns shop-floor data into decisions and paperwork into flow.

INDUSTRIES IN THIS SECTOR

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Discrete Manufacturing & Engineering

Quotes, schedules, quality checks and maintenance handled on every shift.

INDUSTRY OVERVIEW

Engineering and discrete manufacturers run on RFQs, drawings, bills of materials, production schedules, inspection reports and maintenance logs. Planners re-sequence jobs by hand, engineers read every drawing to quote, and quality records sit in paper travellers and Excel. AI reads the documents, plans the floor, watches the machines and keeps quality paperwork audit-ready.

AUTOMATION POTENTIAL

IMPLEMENTATION High

TYPICAL DECISION MAKERS

- Plant Head / Works Manager
- Chief Operating Officer
- Head of Quality

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Sales & Estimating

1. **RFQ intake**
   Document AI reads RFQs and drawings, extracting materials, tolerances, finishes and quantities.
2. **Cost estimation**
   Estimates cycle time, material and routing cost from similar past jobs for the estimator to confirm.
3. **Order acknowledgement**
   Checks PO terms, revisions and delivery dates against the quote and drafts the acknowledgement.
4. **Order status queries**
   Answers customer questions on job progress and dispatch dates directly from live ERP data.

B Production Planning

1. **Job scheduling**
   Re-sequences jobs across machines whenever orders, materials or breakdowns change the plan.
2. **Material availability**
   Checks BOM requirements against stock and open POs and flags shortages before job release.
3. **Shift handover notes**
   Summarises output, scrap, downtime and open issues into a clear handover for the next shift.
4. **Work instruction updates**
   Turns engineering change notices into updated, illustrated work instructions for operators.

C Quality & Compliance

1. **Visual inspection**
   Computer vision inspects parts in-line for surface defects, missing features and assembly errors.
2. **Inspection reports**
   Builds first-article and dimensional reports from gauge and CMM data in the customer's format.
3. **Non-conformance handling**
   Opens NCRs, suggests likely root causes from past cases and tracks each corrective action.
4. **Certificate packs**
   Compiles material certificates, test results and declarations into the dispatch document pack.

D Maintenance & Supply

1. **Machine health monitoring**
   Predicts failures from vibration, temperature and spindle-load data and books maintenance early.
2. **Breakdown logging**
   Lets technicians report faults by voice or photo and suggests fixes from the maintenance history.
3. **Purchase requisitions**
   Raises requisitions for shortages, compares supplier quotes and routes them for approval.
4. **Supplier delivery follow-up**
   Chases late deliveries and certificates from suppliers and updates expected dates in the ERP.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

06:00 — The night-shift handover is ready, with downtime and scrap causes listed.

08:00 — Today's schedule has been re-sequenced around a late material delivery.

11:00 — New RFQs are read and estimated; estimators review drafts, not blank sheets.

14:00 — Vision checks flag a drift in surface finish before a whole batch goes wrong.

17:30 — Dispatch packs with certificates and inspection reports are ready to ship.

Signature AI solutions

BUILT FOR MANUFACTURING

KNOWLEDGE ASSISTANT

RFQ-to-Quote Copilot

Reads drawings and RFQs, finds similar past jobs, estimates routing and cost, and drafts the quote for an estimator to check and send.

PREDICTIVE AI

Smart Scheduler

Builds and rebuilds the production schedule around machine capacity, material arrivals and due dates, showing planners the trade-offs.

COMPUTER VISION

Inline Vision Inspector

Camera-based inspection that spots defects and assembly errors at the station, logs images and stops bad parts moving downstream.

DOCUMENT AI

Quality Docs Agent

Assembles inspection reports, certificates and NCR records in each customer's format, keeping every file ready for audits.

Systems we integrate with

- ERP (SAP, Oracle NetSuite, Odoo)
- MES and shop-floor data systems
- CAD/PLM (SolidWorks, Siemens NX)
- Quality management systems
- CMMS (IBM Maximo, Fiix)
- Industrial IoT & PLCs (OPC UA)
- CMM and gauge software
- Supplier portals & EDI

Customised to each client

1. Encode the shop's own routings, machine rates and quoting rules into the estimating copilot.
2. Train vision models on the client's own parts, defect samples and accept or reject criteria.
3. Format inspection reports and certificate packs to each customer's quality requirements.
4. Set scheduling priorities such as due date, changeover time or key-account orders per plant.
5. Run models on an edge server inside the plant where machine data must stay on-site.

Business outcomes

Quicker quote turnaround
Estimators confirm drafts instead of reading every drawing from scratch.

Steadier schedules
Planners react to disruption quickly instead of rebuilding spreadsheets by hand.

Fewer quality escapes
Defects are caught at the station, before they reach assembly or the customer.

Audit-ready quality
Inspection data, NCRs and certificates are filed and traceable for every order.

START HERE · 30-DAY PILOT

Automate RFQ reading and estimating for one product line

1 — WEEK 1
Gather recent RFQs, drawings, quotes and routings for the chosen product family.

2 — WEEK 2
Configure drawing extraction and similar-job estimating against the shop's cost rules.

3 — WEEK 3
Run in parallel with estimators on live RFQs and tune extraction and cost accuracy.

4 — WEEK 4
Let estimators work from AI drafts by default, review effort saved and pick the next area.

FMCG & Food Processing

From raw intake to retail shelf, AI keeps batches, stock and trade on plan.

INDUSTRY OVERVIEW

Food processors and FMCG brands balance raw-material intake, batch production, shelf-life, distributor orders and retail promotions every day. Planners chase forecasts in spreadsheets, QA teams fill traceability records by hand and reps key in orders from WhatsApp. AI forecasts demand, plans batches, keeps traceability live and turns field and retail data into action.

AUTOMATION POTENTIAL ●●●●●

IMPLEMENTATION ▬▬▬ Medium

TYPICAL DECISION MAKERS

- Supply Chain Director
- Head of Sales & Distribution
- Plant & QA Manager

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Demand & Production Planning

1. **Demand forecasting**
   Forecasts SKU demand by channel and region from sales, promotions, seasons and festive calendars.
2. **Batch planning**
   Plans batches around line capacity, changeovers, allergen sequencing and shelf-life targets.
3. **Raw material planning**
   Translates the plan into ingredient and packaging needs and flags gaps against supplier lead times.
4. **Production reporting**
   Collects line output, yield and downtime into a shift report the plant head can act on.

B Quality & Food Safety

1. **Incoming material checks**
   Reads supplier certificates of analysis and compares each result with the specification on arrival.
2. **HACCP & CCP records**
   Captures critical-control-point readings from sensors and tablets and alerts on any deviation.
3. **Batch traceability**
   Links ingredient lots to finished batches and customers, so a recall query is answered quickly.
4. **Label & artwork checks**
   Checks label artwork for ingredients, allergens, nutrition panel and language against the recipe.

C Sales & Distribution

1. **Distributor order capture**
   Captures orders sent by WhatsApp, email or phone and books them into the ERP with scheme pricing.
2. **Suggested outlet orders**
   Suggests the next order for each outlet from past purchases, current stock and running schemes.
3. **Secondary sales tracking**
   Consolidates distributor stock and sales reports into one view of sell-through by territory.
4. **Retail shelf audits**
   Computer vision reads shelf photos for share of shelf, out-of-stocks and planogram compliance.

D Trade & Finance

1. **Promotion claims**
   Validates distributor and retailer scheme claims against agreed terms and evidence before payout.
2. **Trade spend analysis**
   Compares promotion spend with uplift by SKU and outlet to show which schemes actually worked.
3. **Distributor credit control**
   Tracks distributor credit limits and dues, sending reminders and holding orders when needed.
4. **Near-expiry & returns**
   Predicts near-expiry stock in the channel and suggests liquidation or transfer before write-off.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

06:30 — The overnight forecast has refreshed and today's batch plan reflects new orders.

09:00 — Distributor WhatsApp orders are booked into the ERP with the correct schemes.

11:30 — A supplier certificate failed spec, and QA already has the hold note ready.

15:00 — Shelf photos from field reps show out-of-stocks, sent to the right distributor.

20:00 — Traceability records for every batch closed today are complete and searchable.

Signature AI solutions

BUILT FOR MANUFACTURING

PREDICTIVE AI

Demand & Batch Planner

Forecasts demand by SKU and channel, then proposes batch plans that respect capacity, changeovers, allergens and shelf-life limits.

AI AGENT

Order Desk Agent

Reads distributor and retailer orders from WhatsApp, email and PDFs, applies the right price lists and schemes, and books them in the ERP.

COMPUTER VISION

Shelf Vision Audit

Analyses photos taken by field reps to measure shelf share, out-of-stocks and planogram compliance, then raises tasks for the sales team.

WORKFLOW AUTOMATION

Traceability & QA Agent

Captures CCP readings, certificates and lot links in one trail, alerts QA to deviations and answers recall queries without a paper hunt.

Systems we integrate with

- ERP (SAP, Dynamics 365, Tally)
- Distributor management systems
- Sales force automation apps
- QMS and lab systems (LIMS)
- IoT sensors on lines and cold rooms
- WhatsApp Business API
- BI tools (Power BI, Tableau)
- Retailer and e-commerce portals

Customised to each client

1. Load the client's SKU hierarchy, pack sizes, price lists and running trade schemes per channel.
2. Set batch-planning rules for allergens, changeover order, minimum runs and shelf-life targets.
3. Match QA records and hold notes to the plant's own HACCP plan and food-safety certifications.
4. Configure order capture for the languages and formats distributors actually use day to day.
5. Define which claims and credit holds the AI can clear alone and which need a manager's review.

Business outcomes

Fewer stock-outs
Production and distribution follow a demand view that updates every day.

Less expiry write-off
Near-expiry stock is spotted early enough to move or sell through in time.

Recall-ready traceability
Any lot can be traced from supplier to customer in a single, searchable trail.

Smarter trade spend
Schemes are judged on real sell-through, so budgets move to what works.

START HERE · 30-DAY PILOT

Automate distributor order capture for one region

1 **WEEK 1** — Collect sample orders, price lists, schemes and distributor codes for the pilot region.

2 **WEEK 2** — Configure the order desk agent to read WhatsApp, email and PDF orders into a test ERP.

3 **WEEK 3** — Run live with sales coordinators approving each booking, then tune scheme matching.

4 **WEEK 4** — Auto-book clean orders, review accuracy and effort with sales, then pick the next region.

Chemicals, Metals & Process Industries

Safer plants and steadier output, with AI watching every process and document.

21

INDUSTRY OVERVIEW

Chemical, metals and process plants run around the clock, generating sensor data, lab results, shift logs, permits and safety documents. Engineers watch dashboards, operators write handover notes and HSE teams maintain SDS and permits by hand, while sales handles spec and COA requests. AI monitors the process, predicts failures, manages documents and keeps compliance live.

AUTOMATION POTENTIAL ●●●●○

IMPLEMENTATION ▬▬▬ High

TYPICAL DECISION MAKERS

- Plant Director
- Head of HSE
- Process Engineering Manager

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Process & Production

1. **Process monitoring**
   Predictive AI watches historian data and warns operators of drift before quality or yield suffers.
2. **Shift log & handover**
   Turns operator notes and alarms into a structured handover with open actions and set-point changes.
3. **Batch & grade records**
   Compiles batch sheets, recipe parameters and deviations into a complete electronic batch record.
4. **Energy use tracking**
   Tracks furnace, boiler and compressor energy use and flags abnormal consumption per tonne produced.

B Lab & Quality

1. **Sample result review**
   Reads lab instrument and LIMS results and flags any value drifting toward a specification limit.
2. **Certificates of analysis**
   Generates COAs and mill test certificates per lot in the layout each customer requires.
3. **Specification queries**
   Answers customer and sales questions on grades and specs from approved technical data sheets.
4. **Off-spec disposition**
   Suggests rework, blending or downgrade options for off-spec lots based on past decisions.

C Maintenance & Reliability

1. **Rotating equipment health**
   Predicts pump, compressor and motor failures from vibration and temperature trends in time to act.
2. **Inspection reports**
   Document AI reads corrosion, thickness and inspection reports and updates the asset risk register.
3. **Work order planning**
   Bundles open work orders by area and shutdown window and checks spares before scheduling.
4. **Critical spares**
   Matches critical spares to equipment and alerts stores before minimum levels are breached.

D HSE & Compliance

1. **Permit to work**
   Checks permit applications for isolations, gas tests and sign-offs and flags conflicting work.
2. **SDS management**
   Keeps safety data sheets current, extracts hazard data and pushes updates to labels and stores.
3. **Incident reporting**
   Captures near-misses by voice or photo in any language, classifies them and tracks the actions.
4. **Environmental monitoring**
   Gathers emissions and effluent readings, flags excursions and pre-builds the regulatory reports.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

06:00 — The night-shift handover is summarised, with alarms, deviations and actions.

08:30 — A drift warning on a reactor temperature loop reaches the shift engineer early.

11:00 — COAs for lots released this morning have gone to customers with dispatch notes.

14:00 — Today's permits are cross-checked and any overlapping jobs flagged to HSE.

18:00 — Emissions readings are logged and the daily environmental summary is filed.

Signature AI solutions

BUILT FOR MANUFACTURING

PREDICTIVE AI

Process Watch AI

Learns normal operating patterns from historian and lab data and warns operators of drift, fouling or yield loss before it affects product.

AI AGENT

Reliability Agent

Combines condition data, inspection reports and work orders to prioritise maintenance and plan shutdown scopes with spares confirmed.

DOCUMENT AI

COA & Certificates Desk

Builds certificates of analysis and mill test certificates from LIMS results per lot, in each customer's layout, ready for release.

KNOWLEDGE ASSISTANT

HSE Copilot

Answers SDS, permit and procedure questions for operators in their language and checks permits against isolations and nearby work.

Systems we integrate with

- Process historians (AVEVA PI)
- DCS and SCADA systems
- LIMS (LabWare, LabVantage)
- ERP (SAP S/4HANA, Oracle)
- EAM/CMMS (IBM Maximo, SAP PM)
- HSE and permit-to-work software
- SDS authoring and label systems
- Microsoft Teams & Power BI

Customised to each client

1. Train models on each unit's own historian tags, operating envelopes and product grades.
2. Generate COAs and certificates in the formats and test methods each customer specifies.
3. Map permit, isolation and sign-off rules to the plant's own safe-work procedures and roles.
4. Deploy on-premise beside the DCS network, with read-only access and no data leaving site.
5. Set alarm thresholds and escalation paths per unit, shift and severity with the HSE team.

Business outcomes

Steadier operations
Process drift is noticed early, before it turns into off-spec product or downtime.

Fewer unplanned stops
Equipment issues are scheduled into planned windows instead of failing mid-run.

Faster lot release
Certificates and records are ready as lab results land, so lots ship sooner.

Stronger HSE culture
Reporting is easy in any language, and every action is tracked to closure.

START HERE · 30-DAY PILOT

Predictive monitoring for one critical process unit

1 **WEEK 1** — Select the unit and gather historian tags, lab data, alarm logs and past upset events.

2 **WEEK 2** — Build drift and failure models and agree alert thresholds with process engineers.

3 **WEEK 3** — Run alerts in shadow mode with operators, review every alert and tune sensitivity.

4 **WEEK 4** — Switch alerts live in the control room, review useful catches and plan the next unit.

Textiles, Apparel & Garments

From tech pack to shipment, AI keeps orders, lines and buyers in step.

INDUSTRY OVERVIEW

Textile mills, garment exporters and apparel brands run on tech packs, costings, sampling rounds, line plans, quality audits and shipment documents for demanding buyers. Merchandisers chase approvals by email, planners juggle line loading in spreadsheets and QC teams inspect fabric by eye. AI reads the paperwork, plans the floor, inspects quality and keeps buyers updated.

AUTOMATION POTENTIAL ●●●●○

IMPLEMENTATION ▬▬▭ Medium

TYPICAL DECISION MAKERS

- Managing Director
- Head of Merchandising
- Factory / Production Head

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Merchandising & Sampling

1. **Tech pack reading**
   Document AI extracts measurements, trims, fabric and wash details from each buyer's tech pack.
2. **Garment costing**
   Builds cost sheets from fabric consumption, trims, CM rates and similar past styles for quick quotes.
3. **Sample approvals**
   Tracks proto, fit and PP sample status and chases buyer comments and approvals by email.
4. **Buyer updates**
   Drafts buyer updates on T&A milestones and flags delays before the buyer has to ask for news.

B Production Planning

1. **Line loading**
   Plans styles across lines by capacity, skill matrix and ship dates, re-planning on any delay.
2. **Fabric & trims status**
   Checks in-house fabric and trim status against the plan and alerts on gaps before cutting.
3. **Cut planning**
   Proposes cut plans from order ratios and fabric widths to reduce wastage at the cutting table.
4. **Hourly output tracking**
   Reads line output and WIP from the floor and flags lines falling behind target to supervisors.

C Quality & Compliance

1. **Fabric inspection**
   Computer vision scans fabric rolls for weaving, knitting and dyeing faults and grades each roll.
2. **Inline garment QC**
   Checks stitching and finishing defects at key operations and shows supervisors where faults start.
3. **Final inspection reports**
   Builds AQL inspection reports with photos in each buyer's format ahead of the third-party audit.
4. **Social compliance records**
   Keeps worker, overtime and safety records organised for buyer and certification audits.

D Export & Shipping

1. **Packing lists**
   Generates carton-wise packing lists and carton labels from the final order ratio and buyer rules.
2. **Export documentation**
   Prepares commercial invoices, certificates of origin and shipping documents from the order record.
3. **Shipment booking**
   Sends booking requests to forwarders, tracks confirmations and updates ex-factory dates.
4. **LC & payment tracking**
   Reads LC terms, checks documents for discrepancies and follows up on buyer payments due.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

07:30	10:00	12:30	16:00	19:00
The line plan was adjusted overnight for a late fabric delivery on one style.	Fabric rolls scanned at receiving are graded, with faulty rolls held back.	Buyer comments on fit samples are logged and tasks sent to the pattern room.	Lines behind target are flagged to supervisors with the likely bottleneck.	Packing lists and export invoices for tomorrow's shipment are ready to sign.

Signature AI solutions

BUILT FOR MANUFACTURING

KNOWLEDGE ASSISTANT

Tech Pack & Costing Copilot

Reads buyer tech packs, pulls similar past styles and builds a draft cost sheet and T&A calendar for the merchandiser to confirm.

COMPUTER VISION

Fabric Vision Inspector

Camera-based inspection of fabric rolls and garments that detects faults, grades rolls and records image evidence for buyer disputes.

PREDICTIVE AI

Line Planning Assistant

Plans and re-plans styles across lines using capacity, skills, material status and ship dates, showing which orders are at risk.

DOCUMENT AI

Export Docs Agent

Produces packing lists, invoices and shipping documents from the order, checks them against LC terms and sends them to forwarders.

Systems we integrate with

- Apparel ERP and PLM systems
- ERP (SAP, Odoo, Tally)
- Marker CAD (Gerber, Lectra)
- Shop-floor data collection
- Buyer vendor portals
- Forwarder & carrier portals
- Email (Outlook, Gmail)
- WhatsApp Business API

Customised to each client

1. Map each buyer's tech pack layout, AQL levels and report formats into the document agents.
2. Load the factory's own CM rates, consumption norms and costing templates for quoting.
3. Train fabric and garment vision models on the client's own defect library and grading rules.
4. Set line-planning priorities by buyer, ship date and style complexity with the planning head.
5. Configure T&A milestones and escalation contacts for each buyer, season and order type.

Business outcomes

On-time shipments
Delays surface early, while there is still time to re-plan lines and inform buyers.

Fewer quality claims
Faults are caught at the roll and the line, not at final audit or by the buyer.

Quicker costings
Merchandisers quote from a solid draft instead of rebuilding sheets for every style.

Clean export paperwork
Documents match LC terms first time, avoiding discrepancy fees and payment delays.

START HERE · 30-DAY PILOT

Automate fabric inspection on one receiving table

1 **WEEK 1**
Install cameras on one inspection table and gather defect samples with the QC team.

2 **WEEK 2**
Train the vision model on the mill's fabrics, faults and grading rules using test rolls.

3 **WEEK 3**
Run alongside inspectors on live rolls, compare results and tune defect thresholds.

4 **WEEK 4**
Let AI grade rolls with inspector sign-off, review fault capture and plan the next table.



08

SECTOR 08 OF 11

Trade, Logistics & Supply Chain

Documents, shipments and stock in constant motion: AI quotes, books, tracks and bills without the manual chase.

INDUSTRIES IN THIS SECTOR

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Trading, Import-Export & Wholesale

Orders, shipments, documents and dues kept moving without the paper chase.

INDUSTRY OVERVIEW

Traders, importers and wholesalers work on thin margins, so the day goes on quoting, taking WhatsApp and email orders, chasing suppliers, preparing shipping and customs documents, tracking containers and collecting payments. Most of it means re-keying the same data into Tally, spreadsheets and portals. AI captures orders, prepares documents, tracks shipments and chases dues.

AUTOMATION POTENTIAL ●●●●●

IMPLEMENTATION Low

TYPICAL DECISION MAKERS

- Owner / Managing Director
- Head of Sales
- Finance & Accounts Manager

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Sales & Order Desk

1. **Price lists & quotes**
   Builds quotes from the latest price list, stock and customer terms and sends them by WhatsApp or email.
2. **Order capture**
   Reads orders from WhatsApp, email and PDFs and creates sales orders in the ERP for approval.
3. **Stock enquiries**
   Answers customer stock, price and delivery questions from live inventory at any time of day.
4. **Reorder reminders**
   Spots customers due to reorder from buying patterns and sends a ready-made order suggestion.

B Purchasing & Suppliers

1. **Supplier quote comparison**
   Normalises supplier quotes by currency, terms and freight and ranks them for the buyer.
2. **Purchase order follow-up**
   Chases suppliers for confirmations, production status and ready dates and updates the ERP.
3. **Proforma invoice checks**
   Checks supplier proformas against the PO for price, quantity, Incoterms and payment terms.
4. **Landed cost calculation**
   Calculates landed cost per item from freight, duty and charges as each document arrives.

C Shipping & Customs Docs

1. **Shipping documents**
   Document AI reads invoices, packing lists and bills of lading and checks they agree with each other.
2. **Customs declarations**
   Pre-fills customs declaration data with HS codes and values for the broker or clearing agent to file.
3. **Container tracking**
   Tracks containers and airway bills with carriers and alerts the team to delays and arrivals.
4. **Letters of credit**
   Checks LC documents for discrepancies against the credit terms before presentation to the bank.

D Finance & Collections

1. **Customer collections**
   Sends polite, escalating reminders on WhatsApp and email and logs promises against invoices.
2. **Credit limit checks**
   Holds new orders for customers over limit or overdue and asks a manager to approve exceptions.
3. **Bank reconciliation**
   Matches bank receipts to invoices every day, including part payments and deducted bank charges.
4. **VAT & GST invoicing**
   Generates compliant VAT or GST invoices and checks tax codes before they post to the ledger.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

08:00 — Overnight WhatsApp and email orders sit as draft sales orders awaiting approval.

10:30 — Supplier quotes for a new enquiry are compared and ranked with landed costs.

13:00 — Documents for an arriving container are checked and sent on to the broker.

16:00 — Collection reminders are out and today's receipts are matched to invoices.

18:30 — Container delays and tomorrow's arrivals are summarised for the logistics team.

Signature AI solutions

BUILT FOR LOGISTICS

CHAT ASSISTANT

WhatsApp Order Desk

Takes stock, price and order requests on WhatsApp, quotes from live inventory and turns confirmed orders into sales orders in the ERP.

DOCUMENT AI

Trade Docs Checker

Reads invoices, packing lists, bills of lading and LC documents, cross-checks every field and prepares customs-ready data for brokers.

AI AGENT

Shipment Tracker Agent

Tracks containers and airway bills across carriers and forwarders, updates expected dates in the ERP and warns sales of any delay.

WORKFLOW AUTOMATION

Collections Agent

Runs reminder sequences, matches receipts to invoices, applies credit holds by rule and gives finance a daily view of overdue accounts.

Systems we integrate with

- Accounting (Tally, Zoho Books)
- ERP (SAP Business One, Odoo)
- WhatsApp Business API
- Email (Outlook, Gmail)
- Forwarder & carrier portals
- Container tracking APIs
- Banking and payment portals
- CRM (Zoho CRM, HubSpot)

Customised to each client

1. Load each customer's price list, discounts, credit terms and preferred channel into the order desk.
2. Set credit-hold rules, overdue thresholds and the managers who may approve each exception.
3. Teach document checks the client's own Incoterms, HS code mappings and LC requirements.
4. Run order and collection messages in Arabic, English, Hindi or whichever languages customers use.
5. Connect to the client's existing Tally, ERP and forwarder portals without changing how they work.

Business outcomes

Faster order handling
Orders become sales orders in moments, without re-keying from chats and PDFs.

Fewer document errors
Mismatches between invoices, packing lists and LCs are caught before shipment.

Healthier cash flow
Overdue invoices are chased consistently and receipts are matched the same day.

Shipment visibility
Sales and logistics see delays early and can warn customers before they call.

START HERE · 30-DAY PILOT

Automate WhatsApp order capture and collections

1 **WEEK 1** — Collect sample orders, price lists, customer terms and the current overdue ledger.

2 **WEEK 2** — Configure the WhatsApp order desk and reminder sequences against a test copy of the ERP.

3 **WEEK 3** — Run live with key customers while staff approve orders and messages, then tune rules.

4 **WEEK 4** — Auto-approve clean orders and reminders, review the results and choose the next process.

Logistics, Freight Forwarding & Courier

Quotes, bookings, customs files and proof of delivery handled before the trucks roll.

INDUSTRY OVERVIEW

Forwarders and couriers live on a constant stream of rate requests, booking confirmations, shipping documents, customs entries and where-is-my-parcel calls. Most of it is retyped between email, carrier portals and the operations system. AI agents can quote, book, file, track and answer customers end to end, so coordinators manage exceptions instead of inboxes.

AUTOMATION POTENTIAL ●●●●●

IMPLEMENTATION ▬▬▭ Medium

TYPICAL DECISION MAKERS

- Managing Director
- Head of Operations
- Customs & Compliance Manager

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Quoting & Bookings

1. **Spot rate requests**
   Reads RFQ emails, pulls current carrier and agent rates and drafts a margin-checked quote for approval.
2. **Carrier booking**
   Agents book space on carrier portals, capture booking numbers and update the shipment file automatically.
3. **Shipping instructions**
   Document AI extracts shipper, consignee and cargo details and builds the draft bill of lading.
4. **Pickup scheduling**
   Confirms collection slots with shippers over WhatsApp and assigns the nearest available vehicle.

B Customs & Documentation

1. **Commercial invoice checks**
   Reads invoices and packing lists, checks HS codes, values and weights, and flags gaps before filing.
2. **Customs declarations**
   Pre-fills declaration data from shipment documents for the broker to review and submit.
3. **Certificate collection**
   Chases certificates of origin and permits from shippers and files each one to the right job.
4. **Document discrepancies**
   Compares bill of lading, invoice and packing list line by line and lists every mismatch to fix.

C Tracking & Last Mile

1. **Shipment status updates**
   Polls carrier and airline tracking, updates milestones and warns customers of delays proactively.
2. **Delivery route planning**
   Builds each morning's courier routes from addresses, time windows and vehicle capacity.
3. **Failed delivery follow-up**
   WhatsApp agents rebook failed deliveries with recipients and update the driver's run sheet.
4. **Proof of delivery capture**
   Reads signed PODs and photos, matches them to the waybill and closes the job automatically.

D Billing & Customer Service

1. **Where-is-my-shipment calls**
   Bilingual voice and chat assistants answer tracking queries around the clock from live status data.
2. **Freight invoicing**
   Builds customer invoices from job costs and accessorials, with VAT and GST applied correctly.
3. **Carrier invoice audit**
   Matches carrier and agent bills to the quoted rates and flags overcharges before payment is made.
4. **Damage claims**
   Logs damage claims, gathers photos and documents, and drafts the claim file for the insurer.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

06:30 — Courier routes are optimised and loaded to driver apps before first dispatch.

09:00 — Overnight rate requests are quoted and waiting for the sales team to approve.

11:30 — New shipping documents are checked; mismatches already sent back to shippers.

15:00 — Customers with delayed containers have been told, with a revised arrival date.

18:30 — Today's PODs are matched, jobs closed and invoices queued for release.

Signature AI solutions

BUILT FOR LOGISTICS

AI AGENT

Freight Quote Agent

Reads incoming rate requests, checks lanes against carrier tariffs and agent rates, and returns a margin-checked quote for sign-off.

DOCUMENT AI

Shipment Docs Reader

Extracts data from invoices, packing lists and bills of lading, cross-checks them and pre-fills customs and booking records.

VOICE AI

Tracking Voice Desk

Answers tracking, rebooking and delivery-slot calls in Arabic, English and Hindi using live milestones from the TMS.

PREDICTIVE AI

Delay Risk Predictor

Watches vessel, flight and road events to predict late shipments early, so coordinators can rebook or warn the customer.

Systems we integrate with

- Freight software (CargoWise, Magaya)
- TMS (Oracle OTM, SAP TM)
- Carrier & airline tracking portals
- ERP (SAP Business One, Odoo)
- Customs broker systems
- WhatsApp Business API
- Route planning & driver apps
- Accounting (Tally, Zoho Books)

Customised to each client

1. Load the client's lanes, tariffs, margin rules and agent network so every quote follows its policy.
2. Map each customer's document requirements, HS code libraries and broker hand-offs per country.
3. Set the languages, tone and channels used to update shippers, consignees and recipients.
4. Choose which exceptions agents resolve alone and which are escalated to a named coordinator.
5. Connect to the client's own TMS, freight software and carrier portals by API or by RPA.

Business outcomes

Faster quote turnaround
Customers receive accurate quotes the same day, while the enquiry is still warm.

Cleaner customs filings
Documents are checked before submission, so fewer shipments are held at the border.

Fewer tracking calls
Customers get proactive updates and self-serve answers on WhatsApp and the web.

Protected margins
Carrier overcharges and unbilled accessorials are caught before invoices go out.

START HERE · 30-DAY PILOT

Automate spot quoting for one trade lane

1 — WEEK 1
Map the quoting process, rate sources, margin rules and approval limits with sales.

2 — WEEK 2
Connect the quote agent to rate sheets and the inbox, and test it on past enquiries.

3 — WEEK 3
Run live alongside the pricing desk, compare quotes and tune margin and escalation rules.

4 — WEEK 4
Go live on the lane, review win rate and turnaround, and choose the next lane to add.

Warehousing & 3PL

Inbound, picking, billing and client reporting that run themselves, shift after shift.

INDUSTRY OVERVIEW

Warehouses and 3PL operators juggle shipping notices, receiving, putaway, pick waves, dispatch and storage billing for many clients at once. Much of it depends on spreadsheets, emailed order files and supervisors chasing exceptions on the floor. AI takes over order intake, slotting, labour planning, client billing and reporting, so the team can focus on accuracy and service.

AUTOMATION POTENTIAL ●●●●●

IMPLEMENTATION Medium

TYPICAL DECISION MAKERS

- General Manager, Warehousing
- Head of Contract Logistics
- Operations Director

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Inbound & Receiving

1. **ASN and PO intake**
   Reads client ASNs and purchase orders from email or EDI and creates receipts in the WMS automatically.
2. **Dock scheduling**
   Books inbound slots with hauliers over WhatsApp and rebalances docks when a truck runs late.
3. **Goods receipt checks**
   Computer vision counts cartons and reads labels at the dock, flagging shortages and damage.
4. **Putaway planning**
   Suggests putaway locations by velocity, size and client rules to keep pick paths short.

B Picking & Dispatch

1. **Order wave planning**
   Groups incoming orders into pick waves by carrier cut-off, zone and priority throughout the shift.
2. **Pick exceptions**
   Spots short picks and empty locations, then triggers replenishment tasks before the wave stalls.
3. **Carrier label creation**
   Selects the carrier for each order, generates labels and manifests, and books the collection.
4. **Dispatch confirmation**
   Sends dispatch notices and tracking links to each client's customers on their chosen channel.

C Inventory & Space

1. **Cycle counts**
   Plans daily cycle counts by risk and value, then reconciles variances with full audit notes.
2. **Expiry and batch control**
   Tracks batch and expiry dates, enforces FEFO picking and alerts clients to slow-moving stock.
3. **Slotting reviews**
   Recommends re-slotting as order profiles change, with a ready move list for the night shift.
4. **Space utilisation**
   Forecasts pallet and bin occupancy so sales can take on new clients with confidence.

D Client Billing & Service

1. **Storage and handling billing**
   Calculates storage, handling and value-added charges from WMS activity per client contract.
2. **Client order queries**
   Chat assistant answers client questions on stock, order status and returns from live WMS data.
3. **Returns processing**
   Reads return reasons, grades items from photos and routes each to restock, repair or disposal.
4. **Client KPI reports**
   Builds each client's weekly service report on accuracy, on-time dispatch and stock health.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

05:30 — Inbound slots are confirmed and the dock plan is ready for the morning shift.

08:00 — First pick waves are released, sorted by carrier cut-off and pick zone.

11:00 — Short picks have already triggered replenishment; no wave is waiting on stock.

16:00 — Labels, manifests and collections are booked for every order due out today.

21:00 — Client stock reports are sent and storage charges are posted to billing.

Signature AI solutions

BUILT FOR LOGISTICS

WORKFLOW AUTOMATION

3PL Billing Engine

Turns WMS activity into accurate storage, handling and value-added charges for each client contract, ready for review and invoicing.

COMPUTER VISION

Dock Vision Check

Cameras at the dock count cartons, read labels and photograph damage, then post the receipt and any exceptions to the WMS.

PREDICTIVE AI

Wave & Labour Planner

Forecasts order volumes by client and hour, then plans pick waves and shift staffing so cut-offs are met without overtime.

CHAT ASSISTANT

Client Service Assistant

Answers each client's questions on stock, orders and returns on WhatsApp, email or portal, using only that client's WMS data.

Systems we integrate with

- WMS (Manhattan, SAP EWM, Odoo)
- ERP (SAP Business One, NetSuite)
- Shopify & marketplace order feeds
- EDI and SFTP order gateways
- Carrier & courier label APIs
- WhatsApp Business API
- Handheld scanners & RF devices
- BI dashboards (Power BI)

Customised to each client

1. Load each client's contract rates, billing units and minimum charges into the billing engine.
2. Apply client-specific rules for FEFO, kitting, labelling and carrier selection on every account.
3. Set separate portals, branding and report packs so every client sees only its own data.
4. Tune slotting and wave logic to the site's layout, handling equipment and shift patterns.
5. Decide which stock variances auto-adjust and which need supervisor sign-off before posting.

Business outcomes

Cut-offs met
Orders are released in the right sequence, so more leave on the planned carrier.

No missed billing
Every pallet day, pick and value-added task is captured and charged correctly.

Accurate stock
Risk-based counts and vision checks keep the system and the shelf in step.

Happier clients
Clients self-serve on stock and orders and receive reports without chasing.

START HERE · 30-DAY PILOT

Automate storage billing for the top client accounts

1 **WEEK 1** — Collect contract rate cards and map billable events to WMS transactions with finance.

2 **WEEK 2** — Build the billing rules, run them on last month's activity and compare with past invoices.

3 **WEEK 3** — Run in parallel with the manual process, resolve differences and tune the billing rules.

4 **WEEK 4** — Go live for the pilot clients, review accuracy and effort, and plan the next accounts.

Shipping, Ports & Maritime

Vessel calls, cargo documents and port operations coordinated by AI around the clock.

INDUSTRY OVERVIEW

Shipping lines, agencies and terminals live on close coordination: vessel arrivals, port clearance, berth and yard planning, crew changes, cargo manifests and disbursement accounts. Much of it moves through emails, PDFs and calls across time zones. AI reads the documents, keeps every party updated, predicts congestion and prepares the paperwork, so operators manage exceptions.

AUTOMATION POTENTIAL

IMPLEMENTATION High

TYPICAL DECISION MAKERS

- Port Operations Director
- Head of Ship Agency
- Fleet Technical Manager

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Ship Agency & Port Calls

1. **Pre-arrival documentation**
   Collects crew lists, cargo declarations and certificates and pre-fills the port clearance pack.
2. **Port call coordination**
   Agents update pilots, berth planners, surveyors and suppliers whenever the vessel's ETA changes.
3. **Disbursement accounts**
   Builds proforma and final disbursement accounts from port tariffs and vendor invoices for approval.
4. **Owner and charterer updates**
   GenAI drafts daily port-call reports for owners and charterers from the agency's own records.

B Terminal & Yard Operations

1. **Berth planning**
   Predicts arrival times and suggests berth windows that limit vessel waiting and crane idle time.
2. **Yard stacking**
   Recommends container positions by vessel, weight and discharge port to reduce re-handling.
3. **Gate transactions**
   Computer vision reads container numbers, seals and damage at the gate and logs each move.
4. **Truck appointments**
   Confirms and reschedules haulier appointments over WhatsApp to smooth peaks at the gate.

C Cargo & Commercial

1. **Manifest processing**
   Document AI reads manifests and bills of lading and flags dangerous goods and data errors.
2. **Booking confirmations**
   Checks booking requests against allocations and vessel capacity, then issues confirmations.
3. **Demurrage and detention**
   Calculates free time and charges per container and reminds consignees before costs build up.
4. **Customer enquiries**
   Chat assistant answers schedule, booking and container status questions for shippers.

D Fleet & Vessel Management

1. **Noon report review**
   Reads daily noon reports, checks speed and fuel use against charter terms and flags deviations.
2. **Planned maintenance**
   Predicts equipment issues from machinery data and schedules the work into the next port call.
3. **Crew certificates**
   Tracks crew certificates and visas, and alerts crewing before anyone becomes non-compliant.
4. **Vetting inspection prep**
   Compiles past findings and open actions into a ready evidence pack ahead of vetting visits.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

06:00 — Overnight ETA changes are pushed to pilots, berths and service suppliers.

08:30 — Pre-arrival packs for this week's port calls are complete and ready to submit.

11:00 — Gate cameras have logged every container move, with damage photos attached.

14:30 — Demurrage reminders have gone to consignees whose free time is running out.

18:00 — Owners receive the daily port-call report; noon reports are checked fleet-wide.

Signature AI solutions

BUILT FOR LOGISTICS

AI AGENT

Port Call Agent

Coordinates every port call: tracks ETA changes, updates pilots, berths and suppliers, and prepares the clearance pack for submission.

DOCUMENT AI

Manifest & BL Reader

Extracts cargo, party and dangerous-goods data from manifests and bills of lading, cross-checks it and loads clean data to the system.

COMPUTER VISION

Gate Vision OCR

Reads container and truck numbers, seals and visible damage at the gate, logging every transaction with time-stamped photos.

PREDICTIVE AI

Berth & ETA Predictor

Combines AIS positions, weather and port data to predict arrivals and congestion, so berth and yard plans stay realistic.

Systems we integrate with

- Terminal OS (Navis N4, Tideworks)
- Port community systems
- AIS vessel tracking feeds
- Ship agency & DA software
- Fleet management systems
- ERP (SAP, Microsoft Dynamics 365)
- WhatsApp Business API
- Email & document management

Customised to each client

1. Configure port-specific tariffs, clearance checklists and agency workflows for each port served.
2. Set update rules per owner and charterer: what they receive, how often and in which format.
3. Train the assistants on the line's schedules, booking terms and free-time policies.
4. Run on the client's private cloud to keep cargo, crew and commercial data under its control.
5. Match alert thresholds for ETA changes, fuel deviations and certificate expiry to fleet policy.

Business outcomes

Smoother port calls
Every party works from the same up-to-date ETA, with fewer last-minute surprises.

Faster clearance
Pre-arrival packs are complete and checked before the vessel reaches the port.

Less congestion
Berth, yard and gate plans adapt early as vessel arrival patterns change.

Fewer revenue leaks
Demurrage, detention and disbursement items are calculated and billed accurately.

START HERE · 30-DAY PILOT

Automate pre-arrival packs for one agency office

1 **WEEK 1** — Map current port-call steps, documents and stakeholders with the agency operations team.

2 **WEEK 2** — Configure document AI and ETA update agents using recent port calls as test cases.

3 **WEEK 3** — Run alongside agency staff on live calls, then tune data checks and escalation rules.

4 **WEEK 4** — Go live for the office, review turnaround and effort, and pick the next port to add.

09

SECTOR 09 OF 11

Energy, Utilities, Telecom & Agriculture

Field-heavy, asset-intensive operations where AI predicts failures, routes crews and keeps customers informed.

INDUSTRIES IN THIS SECTOR

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Oil, Gas & Energy Services

Field reports, permits, maintenance and HSE paperwork handled while crews stay on the job.

INDUSTRY OVERVIEW

Oilfield service firms and energy contractors run on field work: daily drilling and production reports, permits to work, equipment maintenance, HSE observations, field tickets and long tenders. Data arrives from rigs, sites and subcontractors in every format. AI reads and reconciles it, predicts failures, drafts reports and tenders, and keeps compliance evidence audit-ready.

AUTOMATION POTENTIAL ●●●●○

IMPLEMENTATION ▬▬▬ High

TYPICAL DECISION MAKERS

- VP Operations
- HSE Director
- Asset Integrity Manager

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Field Operations

1. **Daily drilling reports**
   Reads daily reports from each rig, standardises the data and highlights causes of non-productive time.
2. **Permit to work**
   Checks permit requests against isolation rules and open jobs, then routes them for sign-off.
3. **Shift handovers**
   GenAI summarises logs and open issues into a clear handover note for the incoming supervisor.
4. **Field ticket capture**
   Document AI reads signed field tickets and matches services and hours to the contract.

B Maintenance & Integrity

1. **Equipment health checks**
   Predicts pump, compressor and turbine faults from sensor trends before an unplanned trip.
2. **Work order creation**
   Raises and prioritises work orders in the CMMS from alarms, inspections and operator notes.
3. **Inspection reports**
   Reads inspection and NDT reports, extracts each finding and updates the integrity register.
4. **Spare parts planning**
   Forecasts critical spares from planned work and failure history, and raises requisitions early.

C HSE & Compliance

1. **Incident and near-miss logs**
   Classifies HSE observations, spots repeat hazards and drafts the investigation summary.
2. **Emissions and flaring data**
   Collects meter and flare data, checks for gaps and pre-builds emissions reports for review.
3. **Competency tracking**
   Tracks crew training and certificates and blocks rota assignments that would breach the rules.
4. **PPE and site safety**
   Computer vision checks site camera feeds for missing PPE and breaches of exclusion zones.

D Commercial & Contracts

1. **Tender responses**
   Reads tender packs, builds the compliance matrix and drafts technical answers from past bids.
2. **Service invoicing**
   Turns approved field tickets into invoices with the correct contract rates and PO references.
3. **Subcontractor documents**
   Chases subcontractor insurances, certificates and timesheets and checks each one on arrival.
4. **Local content reporting**
   Compiles supplier and workforce data into local content reports ready for client review.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

05:00 — Overnight sensor trends are scored; at-risk pumps already have work orders.

07:00 — Handover notes are ready for every supervisor before the toolbox talk.

10:30 — Yesterday's drilling reports are standardised and downtime causes highlighted.

14:00 — Signed field tickets are matched to contract rates and drafted as invoices.

18:00 — HSE observations are classified and the weekly safety pack is pre-built.

Signature AI solutions

BUILT FOR ENERGY

PREDICTIVE AI

Asset Health Monitor

Watches sensor and maintenance history for rotating equipment, predicts failures early and raises prioritised work orders in the CMMS.

DOCUMENT AI

Field Ticket Reader

Reads handwritten and scanned field tickets, checks services against contract rates and prepares invoices for approval.

AI AGENT

HSE Insight Agent

Classifies incidents and observations, finds repeat hazards across sites and drafts investigation and management reports.

GENAI CONTENT

Tender Response Copilot

Builds compliance matrices and drafts technical tender answers from the company's past bids, procedures and staff CVs.

Systems we integrate with

- ERP (SAP S/4HANA, Oracle)
- CMMS (IBM Maxino, SAP PM)
- Historians (AVEVA PI System)
- SCADA and DCS data feeds
- HSE software (Enablon, Intelex)
- Document control (Oracle Aconex)
- Microsoft 365 & SharePoint
- WhatsApp Business API

Customised to each client

1. Encode the client's permit-to-work rules, isolation standards and sign-off hierarchy.
2. Tune failure models to each site's equipment, operating envelope and maintenance history.
3. Map contract rate cards, field ticket formats and client approval steps for invoicing.
4. Host on-premise or in-country to meet operator data-security and residency requirements.
5. Align HSE classifications, report templates and escalation contacts with the client's system.

Business outcomes

Fewer unplanned stops
Equipment issues surface early enough to plan the repair around operations.

Faster billing
Field tickets become invoices quickly, with fewer client disputes over rates.

Safer sites
Hazard patterns are spotted across sites and acted on before they repeat.

Audit-ready records
Permits, competencies and emissions data are complete and easy to evidence.

START HERE · 30-DAY PILOT

Predict failures on critical pumps at one site

WEEK 1 — Select critical equipment, gather sensor and work order history, and agree alert rules.

WEEK 2 — Build and test failure models on historical data with the site's reliability engineers.

WEEK 3 — Run alerts live alongside the maintenance team, then tune thresholds and work order logic.

WEEK 4 — Go live for the site, review avoided trips and effort, and choose the next asset class.

Utilities, Power & Renewables

Meter-to-cash, outage response and asset care, run by AI for every connection.

INDUSTRY OVERVIEW

Utilities and power producers handle a steady flow of meter reads, bills, connection requests, outage calls, work orders and asset inspections, while renewable plants add output forecasting and performance reporting. Much of it is split across billing, GIS and field systems. AI validates readings, answers customers, predicts faults and dispatches crews, keeping supply reliable.

AUTOMATION POTENTIAL ●●●●○

IMPLEMENTATION ▬▬▬ High

TYPICAL DECISION MAKERS

- Chief Operating Officer
- Head of Customer Services
- Director of Asset Management

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Metering & Billing

1. **Meter read validation**
   Checks smart and manual reads for gaps, spikes and tampering patterns before each billing run.
2. **Bill exceptions**
   Investigates high and estimated bills, corrects data issues and holds back only true exceptions.
3. **Payment reminders**
   Sends reminders over SMS and WhatsApp, offers instalment plans and logs every promise to pay.
4. **New connections**
   Document AI checks connection applications and drawings and tracks each step to energisation.

B Customer Service

1. **Outage calls**
   Voice AI tells callers about known outages and expected restoration times from the outage system.
2. **Move-in and move-out**
   Chat assistant opens and closes accounts, collects final reads and confirms deposit refunds.
3. **Complaint handling**
   Classifies complaints, drafts replies and tracks each case against the regulator's timelines.
4. **Usage and tariff queries**
   Explains bills and tariffs in plain language and suggests practical ways to cut consumption.

C Grid & Field Operations

1. **Fault localisation**
   Combines SCADA alarms and smart meter signals to pinpoint the most likely fault location.
2. **Crew dispatch**
   Assigns work orders to the nearest qualified crew and keeps affected customers updated on ETAs.
3. **Asset inspections**
   Computer vision reviews drone and line patrol images for damaged insulators and vegetation.
4. **Planned outage notices**
   Notifies affected customers of planned work by area, with a reminder the day before it starts.

D Renewables & Generation

1. **Generation forecasting**
   Forecasts solar and wind output from weather data to support scheduling and grid dispatch.
2. **Plant performance review**
   Compares inverter and turbine output with expected yield and flags any underperformance.
3. **Panel and blade inspection**
   Analyses drone thermal images to find panel hot spots, soiling and turbine blade damage.
4. **Regulatory energy reports**
   Pre-builds generation, availability and emissions reports from plant and meter data.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

05:30 — Overnight meter reads are validated; suspect readings are held for review.

07:30 — Today's solar and wind output forecasts are shared with the dispatch desk.

10:00 — Callers in an outage area hear the cause and restoration time straight away.

13:30 — Drone images from yesterday's line patrol are reviewed and defects ticketed.

17:00 — Bill exceptions are cleared and the billing run is released on schedule.

Signature AI solutions

BUILT FOR ENERGY

VOICE AI

Outage Voice Agent

Handles outage and emergency calls in Arabic and English, shares restoration times and logs new faults straight into the outage system.

WORKFLOW AUTOMATION

Meter Data Validator

Validates and estimates meter reads, detects tampering patterns and clears billing exceptions before each billing cycle runs.

COMPUTER VISION

Grid Asset Inspector

Reviews drone, thermal and patrol images of lines, substations and solar fields, and raises work orders for each confirmed defect.

PREDICTIVE AI

Renewables Forecaster

Forecasts plant output and flags underperforming strings and turbines, giving operators a clear daily view of yield and risk.

Systems we integrate with

- Billing (SAP IS-U, Oracle CC&B)
- Meter data management systems
- SCADA & outage management
- GIS (Esri ArcGIS)
- EAM (IBM Maximo, SAP PM)
- Field service (ServiceNow FSM)
- WhatsApp Business API
- Weather & solar forecast data

Customised to each client

1. Configure the utility's tariffs, billing cycles, estimation rules and payment plan policies.
2. Train voice and chat assistants on local service areas, outage procedures and customer FAQs.
3. Set validation thresholds and tamper rules per meter type, customer class and region.
4. Align crew dispatch logic with the client's skills matrix, safety rules and shift patterns.
5. Deploy within the client's network or sovereign cloud to meet critical infrastructure rules.

Business outcomes

Accurate bills
Reads are validated before billing, so fewer customers receive a wrong bill.

Calmer outage days
Customers hear updates automatically, freeing agents for urgent cases.

Healthier assets
Defects are found from images and data before they cause a supply interruption.

Better plant yield
Underperforming panels and turbines are spotted and repaired much sooner.

START HERE · 30-DAY PILOT

Automate meter read validation for one billing cycle

1 **WEEK 1** — Review current validation rules, exception queues and billing timelines with the team.

2 **WEEK 2** — Configure validation and estimation logic and test it against recent billing cycles.

3 **WEEK 3** — Run in parallel with the billing team, compare exceptions and tune the thresholds.

4 **WEEK 4** — Go live for the pilot cycle, review accuracy and effort saved, and plan the next area.

Telecom & Internet Service Providers

Orders, installs, faults and renewals handled by AI from first click to final bill.

INDUSTRY OVERVIEW

Telecom operators and ISPs handle a constant stream of new orders, number ports, installations, fault tickets, billing disputes and renewals. Work hops between CRM, provisioning, field service and network monitoring, with much re-keying. AI agents capture and provision orders, troubleshoot lines with customers, predict churn and network faults, and keep every ticket moving.

AUTOMATION POTENTIAL ●●●●●

IMPLEMENTATION ▬▬▬ High

TYPICAL DECISION MAKERS

- Chief Customer Officer
- Head of Network Operations
- Director of Sales & Retention

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Sales & Order Handling

1. **New service orders**
   Captures orders from web, store and chat, checks coverage and creates the order in the BSS.
2. **ID and contract checks**
   Document AI verifies IDs and contracts at sign-up and flags any mismatch before activation.
3. **Number porting**
   Tracks each port request, chases missing details and tells the customer when the port completes.
4. **Business quotes**
   Drafts SME and enterprise proposals from the product catalogue and site survey details.

B Installation & Field Work

1. **Install scheduling**
   Books installation slots with customers on WhatsApp and reschedules when an engineer runs late.
2. **Engineer dispatch**
   Assigns jobs by skill, location and equipment, and sends each engineer a complete job brief.
3. **Job completion checks**
   Reviews install photos and line test results to confirm the service is live before closing.
4. **Equipment returns**
   Chases router and set-top box returns from leaving customers and books courier collections.

C Network & Fault Management

1. **Fault ticket triage**
   Correlates customer tickets with network alarms and groups related ones into a single incident.
2. **Remote line diagnostics**
   Runs line and router tests during the chat, resets equipment and fixes the most common faults.
3. **Network anomaly alerts**
   Predicts congestion and equipment failures from network data before customers notice them.
4. **Outage notifications**
   Sends targeted updates to affected customers and gives agents a shared status script.

D Billing & Retention

1. **Billing disputes**
   Reviews the usage and charges behind a disputed bill and drafts a resolution for approval.
2. **Collections reminders**
   Sends tailored reminders and payment links, and suspends service only within approved rules.
3. **Churn risk scoring**
   Scores customers for churn risk daily and passes retention offers to the right channel.
4. **Plan upgrade offers**
   Recommends upgrades from usage patterns and drafts personalised offers for each segment.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

07:00 — Today's installation routes are set and every customer has a confirmed slot.

09:30 — Overnight tickets are grouped by network incident; field teams know hotspots.

12:00 — The chat assistant has fixed common router faults remotely, with no site visit.

15:30 — Customers at high risk of churn have received tailored retention offers.

20:00 — The day's billing disputes carry draft resolutions waiting for approval.

Signature AI solutions

BUILT FOR ENERGY

CHAT ASSISTANT

Fault Fix Assistant

Guides customers through line and router checks, runs remote diagnostics and resets, and books an engineer only when needed.

AI AGENT

Order-to-Activate Agent

Takes orders from any channel, verifies documents, checks coverage and drives provisioning until the service is live.

PREDICTIVE AI

Churn Radar

Scores every subscriber for churn risk from usage, tickets and payments, and triggers the right retention action in time.

VOICE AI

Telco Voice Desk

Answers billing, outage and plan questions in several languages, authenticates callers and hands complex cases to agents.

Systems we integrate with

- BSS & billing (Amdocs, Ericsson)
- OSS & network monitoring tools
- CRM (Salesforce, Dynamics 365)
- Field service (ServiceNow FSM)
- Contact centre (Genesys, Avaya)
- WhatsApp Business API
- Payment gateways
- Number portability systems

Customised to each client

1. Load the operator's plans, bundles, coverage maps and eligibility rules into every agent.
2. Script troubleshooting flows for the client's own routers, ONTs and network topology.
3. Set retention offer limits by segment so agents never discount beyond approved levels.
4. Support the client's customer languages across voice, chat, WhatsApp and the self-care app.
5. Meet telecom data-privacy rules with in-country hosting, data masking and full call logging.

Business outcomes

Quicker activations
Orders move from sign-up to live service with fewer hand-offs and delays.

Fewer truck rolls
More faults are fixed remotely, so engineers visit only when truly needed.

Lower churn
At-risk customers are reached with the right offer before they decide to leave.

Consistent service
Every channel gives the same accurate answer, whatever the time of day.

START HERE · 30-DAY PILOT

Automate first-line broadband fault handling

1 — WEEK 1
Analyse common fault types, diagnostic steps and escalation rules with support leads.

2 — WEEK 2
Build the fault assistant with remote diagnostics and test it on recent fault tickets.

3 — WEEK 3
Launch to a share of chat traffic, review transcripts and tune fixes and hand-offs.

4 — WEEK 4
Expand to all chat and WhatsApp traffic, review resolution quality and plan voice next.

Agriculture & Agri-business

From field and greenhouse to buyer, AI that plans, monitors and sells the harvest.

INDUSTRY OVERVIEW

Farms, greenhouses, dairies and agri-traders juggle irrigation, crop and herd monitoring, input buying, labour rotas, harvest grading, buyer orders and traceability records. Much of it runs on paper, WhatsApp and memory, often across scattered sites. AI watches crops and animals, plans inputs and labour, grades produce, manages orders and keeps the traceability file current.

AUTOMATION POTENTIAL ●●●●○

IMPLEMENTATION ▬▬▭ Medium

TYPICAL DECISION MAKERS

- Farm Operations Manager
- Managing Director
- Procurement & Supply Head

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Crop & Field Management

1. **Irrigation scheduling**
   Plans irrigation from soil sensors and weather forecasts and adjusts valves for each field block.
2. **Crop scouting**
   Computer vision checks drone and phone images for pests, disease and signs of nutrient stress.
3. **Spray and fertiliser plans**
   Drafts application plans by crop stage and records every treatment for traceability.
4. **Yield forecasting**
   Forecasts harvest volumes and dates by block so sales can commit to buyers early.

B Livestock & Dairy

1. **Herd health monitoring**
   Flags animals with changes in feeding, movement or milk yield so the vet can examine them early.
2. **Feed planning**
   Calculates rations and feed orders from herd size, lactation stage and stock on hand each week.
3. **Breeding records**
   Tracks heat detection, insemination and calving dates and reminds staff of each next step.
4. **Milk collection logs**
   Reads collection and quality slips and reconciles volumes with the processor's records.

C Harvest, Grading & Sales

1. **Produce grading**
   Computer vision grades fruit and vegetables by size, colour and defects on the pack line.
2. **Buyer order intake**
   Captures orders from WhatsApp, email and calls, checks graded stock and confirms delivery slots.
3. **Market price updates**
   Summarises daily market prices and buyer demand to guide what to harvest and where to sell.
4. **Delivery documents**
   Generates delivery notes, invoices and phytosanitary request details for every outgoing load.

D Inputs, Labour & Compliance

1. **Input purchasing**
   Tracks seed, feed and agrochemical stock and raises purchase requests well before shortages.
2. **Labour rotas**
   Builds daily crew rotas by task and block and records attendance from a WhatsApp check-in.
3. **Traceability records**
   Links each batch to its field, treatments and harvest date for buyer and retailer audits.
4. **Certification audits**
   Compiles records and evidence for GlobalG.A.P. and buyer audits, listing any gaps to close.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

05:30 — Irrigation plans have adjusted overnight to soil moisture and today's forecast.

07:30 — Crews receive today's tasks and blocks; attendance logs as they check in.

10:00 — Scouting images are reviewed and pest hotspots are marked for the spray team.

14:00 — Buyer orders are confirmed against graded stock and delivery slots are booked.

18:00 — Traceability records for today's harvest are complete and audit-ready.

Signature AI solutions

BUILT FOR ENERGY

COMPUTER VISION

Crop Watch Vision

Analyses drone and field photos to detect pests, disease and stress early, marking affected blocks on a map for the field team.

PREDICTIVE AI

Smart Irrigation Planner

Combines soil sensors, weather and crop stage to schedule irrigation block by block, saving water while protecting yield.

CHAT ASSISTANT

Buyer Order Assistant

Takes orders from buyers on WhatsApp in their own language, checks graded stock and confirms prices and delivery slots.

WORKFLOW AUTOMATION

Traceability Agent

Links every batch to its field, inputs and harvest records, and builds certification and buyer audit packs on demand.

Systems we integrate with

- Farm management (Cropwise, Agworld)
- IoT soil & weather sensors
- Drone imagery platforms
- Herd software (DeLaval, Afimilk)
- ERP (Odoo, SAP Business One)
- Accounting (Tally, Zoho Books)
- WhatsApp Business API
- Pack line & grading machines

Customised to each client

1. Set crop calendars, irrigation limits and treatment rules for each farm, crop and variety.
2. Tune grading standards to each buyer's specifications for size, colour and defect tolerance.
3. Run the assistant in Arabic, Hindi, English or the local languages used by crews and buyers.
4. Work offline-first on remote sites, syncing field data whenever connectivity returns.
5. Match traceability fields and report formats to the client's certifications and retailers.

Business outcomes

Healthier crops
Pests and stress are found early, so treatments are targeted and timely.

Better water use
Irrigation follows real field conditions rather than fixed schedules.

Reliable buyer supply
Forecasts and graded stock let the farm commit to buyers with confidence.

Audit-ready records
Traceability and certification evidence is captured as the work happens.

START HERE · 30-DAY PILOT

Pilot AI scouting and irrigation on selected blocks

1 — WEEK 1
Choose pilot blocks, install or connect sensors, and agree alert rules with agronomists.

2 — WEEK 2
Configure image analysis and irrigation plans and test them against recent field data.

3 — WEEK 3
Run live alongside the field team, compare recommendations and tune the thresholds.

4 — WEEK 4
Go live on the blocks, review crop health and water use, and choose the next crops.

10

SECTOR 10 OF 11

Professional & Business Services

Firms sell expertise and time; AI removes the admin, drafting and chasing that eats into billable hours.

INDUSTRIES IN THIS SECTOR

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Accounting, Audit & Tax Firms

Bookkeeping, audit fieldwork and tax returns prepared by AI, reviewed by your partners.

INDUSTRY OVERVIEW

Accounting practices spend their days chasing client documents, posting transactions, reconciling banks, preparing VAT and GST returns, testing audit samples and drafting reports, with peaks at each deadline. Most of it is repetitive and evidence-heavy. AI collects and reads client records, posts and reconciles, prepares workpapers and returns, and frees partners to advise.

AUTOMATION POTENTIAL ●●●●●

IMPLEMENTATION Medium

TYPICAL DECISION MAKERS

- Managing Partner
- Audit Partner
- Head of Tax

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Bookkeeping & Accounts

1. **Client document collection**
   Agents request missing invoices and statements over WhatsApp and email and file each upload.
2. **Invoice and receipt posting**
   Document AI reads bills and receipts, codes them to the right account and posts them with VAT.
3. **Bank reconciliation**
   Matches bank lines to ledger entries daily and queries the client only on unexplained items.
4. **Management accounts**
   Builds monthly P&L, balance sheet and commentary drafts for the manager to review.

B Tax & Compliance

1. **VAT and GST returns**
   Pre-builds returns from the ledger, flags unusual items and reconciles them to filed periods.
2. **Corporate tax workpapers**
   Maps the trial balance to tax adjustments and drafts the computation with supporting schedules.
3. **Deadline tracking**
   Tracks every client's filing dates and requests data well before each deadline approaches.
4. **Tax notice handling**
   Reads authority notices, summarises what is asked and drafts a response for the tax manager.

C Audit & Assurance

1. **Audit request lists**
   Issues PBC lists, tracks each item on a client portal and chases anything that is overdue.
2. **Sample testing**
   Reads invoices, contracts and bank evidence for selected samples and records each test result.
3. **Journal entry analysis**
   Scans the full journal population for unusual entries and lists the items for follow-up.
4. **Financial statement drafts**
   Drafts financial statements and notes from the trial balance using the firm's own templates.

D Practice Management

1. **Client onboarding**
   Collects KYC documents, runs screening and prepares engagement letters for partner sign-off.
2. **Timesheet completion**
   Reminds staff of missing time entries and suggests entries from calendar and email activity.
3. **Billing and WIP**
   Drafts fee invoices from WIP and engagement terms, then chases overdue fees politely.
4. **Routine client queries**
   Knowledge assistant answers routine client questions from the firm's guidance and client file.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

07:30 — Bank feeds are reconciled for bookkeeping clients; only real queries remain.

09:00 — Clients missing VAT data this period have received a reminder and upload link.

11:30 — Audit samples are read and tested, each result linked to its evidence.

15:00 — Draft management accounts with commentary are ready for manager review.

18:00 — Timesheets are complete, WIP is updated and fee invoices are drafted.

Signature AI solutions

BUILT FOR SERVICES

AI AGENT

Client Docs Collector

Requests, chases and files client documents across WhatsApp, email and portal, so every job starts with a complete record set.

DOCUMENT AI

Auto Bookkeeper

Reads invoices, receipts and statements, codes and posts them with the right tax treatment, and reconciles the bank each day.

WORKFLOW AUTOMATION

Audit Evidence Assistant

Matches audit samples to evidence, records test results in the workpapers and lists exceptions for the senior to review.

KNOWLEDGE ASSISTANT

Tax Research Copilot

Answers staff questions from current tax guidance and the firm's own memos, citing sources so reviewers can verify quickly.

Systems we integrate with

- Accounting (Xero, QuickBooks, Tally)
- Zoho Books & Sage
- Audit software (CaseWare)
- Practice management (Karbon)
- Microsoft 365 & SharePoint
- Client portals & e-signature
- WhatsApp Business API
- Bank feeds & statement imports

Customised to each client

1. Load each client's chart of accounts, coding rules and approval limits into the bookkeeper.
2. Use the firm's own audit methodology, workpaper templates and sampling approach throughout.
3. Set review gates so nothing reaches a client or tax authority without a qualified sign-off.
4. Keep client data in the firm's own tenant, with access controls aligned to engagement teams.
5. Brand client reminders and portals with the firm's identity and its clients' languages.

Business outcomes

Smoother deadlines
Data arrives earlier and returns are prepared well ahead of filing dates.

More capacity
Staff spend less time keying data and more time reviewing and advising.

Stronger audit quality
Every test is documented and linked to evidence, ready for file review.

Happier clients
Clients get timely reminders, quick answers and fewer repeat requests.

START HERE · 30-DAY PILOT

Automate bookkeeping for a group of SME clients

1 — WEEK 1
Select pilot clients and map their charts of accounts, coding rules and document sources.

2 — WEEK 2
Configure document reading, coding and bank reconciliation on last month's data.

3 — WEEK 3
Run alongside the bookkeeping team, review postings and tune coding and query rules.

4 — WEEK 4
Go live for the pilot clients, review accuracy and time saved, and plan the next group.

Law Firms & Legal Services

AI that drafts, dockets and chases, so lawyers spend their hours on the law.

INDUSTRY OVERVIEW

Law firms run on documents, deadlines and billable time. Each day brings new matters to open, conflicts to check, contracts to review, court dates to track and timesheets to chase, mostly handled in Word, email and the practice system. AI takes over intake, first-pass review, docketing and billing admin, so lawyers spend their time on advice, negotiation and advocacy.

AUTOMATION POTENTIAL ●●●●○

IMPLEMENTATION Medium

TYPICAL DECISION MAKERS

- Managing Partner
- Head of Legal Operations
- General Counsel (In-house)

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Intake & Matter Opening

1. **New client enquiries**
   Chat assistant qualifies enquiries, captures the facts and books a consultation in the lawyer's diary.
2. **Conflict checks**
   Searches parties and related entities across past matters and flags potential conflicts for review.
3. **Client KYC & engagement**
   Document AI reads IDs and company papers, then drafts the engagement letter from the firm's template.
4. **Matter file setup**
   Creates the matter, folders and budget in the practice system and assigns the team automatically.

B Drafting & Review

1. **Contract review**
   Compares incoming contracts with the firm's playbook and marks risky clauses with suggested edits.
2. **First drafts**
   GenAI assembles NDAs, leases and agreements from approved precedents and the client's instructions.
3. **Due diligence data rooms**
   Reads every document in the data room, extracts key terms and builds the diligence report tables.
4. **Research memos**
   Knowledge assistant searches the firm's precedents and notes and drafts a cited memo for checking.

C Litigation & Deadlines

1. **Court date docketing**
   Reads court notices and orders, then diarises hearings and filing deadlines for the whole team.
2. **Hearing bundles**
   Sorts, de-duplicates and indexes documents and emails into paginated, searchable hearing bundles.
3. **Correspondence triage**
   Classifies incoming letters and emails by matter, urgency and action, and drafts holding replies.
4. **Client status updates**
   Sends clients plain-language progress notes by WhatsApp or email after each key step in the matter.

D Billing & Practice Admin

1. **Time capture**
   Rebuilds missing time entries from emails, calls and documents for each lawyer to confirm.
2. **Pre-bill review**
   Checks narratives against client billing guidelines and flags vague or block-billed entries.
3. **Invoice chasing**
   Agents send polite reminders on overdue bills, log replies and escalate to the partner when needed.
4. **Client account reconciliation**
   Matches client account receipts and payments to matters and highlights balances needing attention.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

07:30 — Overnight court notices have been read and every new deadline is diarised.

09:00 — Intake assistant has qualified last night's enquiries and booked consultations.

11:30 — Associate opens a counterparty draft with risky clauses already marked up.

15:00 — Next week's hearing bundle is indexed, paginated and ready for checking.

18:30 — Time entries rebuilt from the day's work wait for each lawyer to confirm.

Signature AI solutions

BUILT FOR SERVICES

DOCUMENT AI

Contract Review Copilot

Reviews contracts against the firm's own playbook, highlights deviations and proposes fallback wording that lawyers accept or reject.

CHAT ASSISTANT

Client Intake Assistant

Website and WhatsApp assistant that qualifies enquiries, runs conflict and KYC checks and books time in the right lawyer's diary.

KNOWLEDGE ASSISTANT

Precedent Knowledge Bank

Searches the firm's precedents, opinions and know-how in plain language and returns cited answers lawyers can verify in one click.

WORKFLOW AUTOMATION

Docketing & Billing Agent

Diarises court and contractual deadlines, rebuilds missed time entries and chases overdue invoices on a schedule the firm sets.

Systems we integrate with

- Practice management (Clio)
- DMS (iManage, NetDocuments)
- Microsoft 365 & Outlook
- E-signature (DocuSign, Adobe Sign)
- Accounting (Xero, QuickBooks)
- E-discovery (Relativity)
- KYC & AML screening tools
- WhatsApp Business API

Customised to each client

1. Load the firm's own clause playbooks, fallback positions and house drafting style into review.
2. Apply ethical walls and matter-level access so agents only see files the user is cleared for.
3. Host in-region or on-premise to protect privilege, client confidentiality and data residency.
4. Draft and answer in Arabic and English, or the other languages the firm's clients work in.
5. Set billing guidelines per client, plus approval steps before any invoice or letter goes out.

Business outcomes

More time on legal work
Associates spend their day on advice, not formatting, filing and chasing.

Fewer missed deadlines
Every court date and contractual notice is captured and diarised the same day.

Cleaner, faster billing
Time is recorded in full and bills go out without days of pre-bill edits.

Consistent quality
Every draft and review starts from the firm's approved precedents and positions.

START HERE · 30-DAY PILOT

Automate contract review for one practice group

1. **WEEK 1** — Collect the group's playbook, precedents and recent contracts, and agree review rules.
2. **WEEK 2** — Configure the review copilot in Word and the DMS and test it on closed past matters.
3. **WEEK 3** — Run live alongside associates on new contracts, then tune clause rules and wording.
4. **WEEK 4** — Go live for the group, review turnaround and quality, and choose the next workflow.

Recruitment, Staffing & Manpower Supply

AI that sources, screens and mobilises workers while recruiters win and fill roles.

INDUSTRY OVERVIEW

Recruitment and manpower firms juggle job orders, CVs, interviews, visas, timesheets and payroll for workers on client sites. Recruiters spend much of the day screening, chasing candidates and updating the ATS, while ops teams track documents, attendance and invoices. AI takes over sourcing, screening, scheduling, compliance tracking and billing, so people focus on clients.

AUTOMATION POTENTIAL ●●●●●

IMPLEMENTATION Medium

TYPICAL DECISION MAKERS

- Managing Director
- Head of Recruitment Delivery
- Operations Director

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Sourcing & Screening

1. **Job order intake**
   Turns client calls and emails into a structured job spec with must-haves, pay band and start date.
2. **CV screening**
   Reads every CV against the job spec, ranks candidates and explains each shortlist decision.
3. **Database re-engagement**
   Matches past candidates to new roles and messages them on WhatsApp to check interest and availability.
4. **Pre-screen calls**
   Voice agent asks the knockout questions in the candidate's language and logs the answers to the ATS.

B Interviews & Placement

1. **Interview scheduling**
   Agents match candidate and client diaries, send invites and reschedule when someone drops out.
2. **Candidate submissions**
   GenAI writes a tailored candidate profile in the client's format and attaches the formatted CV.
3. **Offer and joining follow-up**
   Chases offer acceptance, documents and joining dates, and flags candidates at risk of dropping out.
4. **Client feedback chasing**
   Reminds hiring managers for interview feedback and updates each candidate's status automatically.

C Mobilisation & Compliance

1. **Document collection**
   Document AI reads passports, certificates and medical reports and checks them for expiry and gaps.
2. **Visa and permit tracking**
   Tracks every worker's visa, permit and medical stage and alerts the team before anything lapses.
3. **Right-to-work checks**
   Verifies identity and work documents against the client's checklist and keeps an audit-ready record.
4. **Travel and site induction**
   Coordinates tickets, accommodation and induction details and sends each worker clear instructions.

D Timesheets & Billing

1. **Timesheet collection**
   Collects timesheets by WhatsApp or photo, reads the hours and matches them to the client's roster.
2. **Payroll inputs**
   Calculates overtime, allowances and deductions from approved hours and prepares the payroll file.
3. **Client invoicing**
   Builds invoices per client contract and rate card, with VAT or GST, and attaches signed timesheets.
4. **Worker queries**
   Chat assistant answers payslip, leave and document questions for workers in their own language.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

07:00 — Overnight applicants have been screened, ranked and shortlisted for each role.

09:30 — Voice agent has finished the pre-screen calls and logged results in the ATS.

12:00 — Interviews are booked across client diaries and every candidate has an invite.

15:30 — Ops sees which workers' visas or medicals need action before they lapse.

18:00 — Approved timesheets flow into payroll and client invoices are drafted.

Signature AI solutions

BUILT FOR SERVICES

AI AGENT

AI Screening Desk

Ranks every applicant against the job spec, asks knockout questions over chat and submits a shortlist with clear reasoning per candidate.

VOICE AI

Candidate Voice Agent

Calls candidates in their own language to confirm interest, availability and notice, then books interviews and updates the ATS.

WORKFLOW AUTOMATION

Mobilisation Tracker

Tracks documents, visas, medicals and travel for every worker and chases each pending step until the worker is on site.

DOCUMENT AI

Timesheet-to-Invoice Bot

Reads timesheets in any format, validates hours against rosters and produces payroll inputs and client invoices for approval.

Systems we integrate with

- ATS & CRM (Bullhorn, Zoho Recruit)
- Job boards (LinkedIn, Indeed)
- WhatsApp Business API
- HRMS & payroll systems
- Accounting (Tally, Zoho Books)
- Calendars (Outlook, Google)
- E-signature (DocuSign)
- Telephony & VoIP systems

Customised to each client

1. Encode each client's screening criteria, interview stages and submission format into the agents.
2. Run candidate chats and calls in Arabic, English, Hindi, Tagalog or the languages workers speak.
3. Map visa, medical and document checklists per destination country and per client site.
4. Apply client-specific rate cards, overtime rules and billing cycles to every invoice produced.
5. Set the score thresholds that auto-reject, auto-shortlist or send a candidate to a recruiter.

Business outcomes

Faster shortlists
Clients receive qualified candidates while the role is still fresh and urgent.

Recruiters who sell more
Less time screening and chasing; more time with clients and top candidates.

Fewer compliance gaps
Every worker's documents and permits are tracked before they become a problem.

Clean, quick billing
Timesheets turn into accurate invoices without manual re-keying or disputes.

START HERE · 30-DAY PILOT

Automate screening and scheduling for one busy desk

1 **WEEK 1** — Map the desk's job specs, knockout questions and ATS stages with the lead recruiters.

2 **WEEK 2** — Configure screening, WhatsApp and voice agents and test them on recent applicants.

3 **WEEK 3** — Run live alongside recruiters, compare shortlists and tune scoring and questions.

4 **WEEK 4** — Go live on the desk, review time-to-shortlist and quality, and pick the next process.

BPO & Contact Centres

AI that takes the routine volume, so your people handle the contacts that matter.

INDUSTRY OVERVIEW

Contact centres and BPO operations live by volume, handling time and service levels. Every shift brings calls, chats and emails to answer, back-office transactions to process, quality to audit and rosters to adjust, most of it repetitive. AI handles routine contacts, assists agents live, audits every interaction and keeps workforce plans and client reporting on track.

AUTOMATION POTENTIAL ●●●●●

IMPLEMENTATION ▬▬▭ Medium

TYPICAL DECISION MAKERS

- Chief Operating Officer
- Head of Client Delivery
- Head of Quality & Training

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Front-line Contacts

1. **Inbound call handling**
   Voice AI answers common requests, verifies callers and passes complex calls on with full context.
2. **Chat and WhatsApp queries**
   Chat assistant resolves routine questions from the client's knowledge base and hands off cleanly.
3. **Email and ticket triage**
   Reads incoming emails, tags intent and priority, drafts replies and routes them to the right queue.
4. **Outbound campaigns**
   Voice and WhatsApp agents run reminders, surveys and renewals and log every outcome to the CRM.

B Agent Assist & Quality

1. **Live call guidance**
   Listens in real time, surfaces the right answer and script, and prompts mandatory compliance lines.
2. **After-call work**
   Writes the call summary, disposition and follow-up tasks into the CRM as soon as the call ends.
3. **Quality audits**
   Scores every call and chat against the client's QA form instead of a small random sample.
4. **Agent coaching**
   Spots recurring gaps per agent and builds short coaching notes and practice scenarios for team leads.

C Back-office Processing

1. **Form and claim processing**
   Document AI reads forms, claims and applications, keys the data and flags missing information.
2. **Data entry and validation**
   Captures data from scans and emails into client systems and checks it against business rules.
3. **Order and account updates**
   Agents update addresses, orders and accounts in client systems through APIs or RPA bots.
4. **Exception handling**
   Groups failed transactions by cause and prepares each case so a processor can resolve it quickly.

D Workforce & Client MIS

1. **Volume forecasting**
   Forecasts contacts by interval and channel from history, client campaigns and seasonal patterns.
2. **Roster and shift changes**
   Proposes schedules, fills gaps from available staff and handles shift swap requests automatically.
3. **SLA monitoring**
   Watches queues in real time and alerts supervisors before service levels slip on any client account.
4. **Client MIS packs**
   Builds daily and monthly client reports with commentary on drivers, trends and actions taken.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

06:30 — Overnight emails are tagged and drafted, so agents start with clear queues.

09:00 — Voice AI is handling the morning peak of balance and order-status calls.

12:30 — Supervisor gets a staffing alert and the roster agent fills the gap.

16:00 — Every call from the morning shift is QA-scored, with coaching notes ready.

20:00 — Client MIS packs publish with trends and commentary for each account.

Signature AI solutions

BUILT FOR SERVICES

VOICE AI

Front-Line Voice Agent

Multilingual voice agent that verifies callers, resolves routine requests end to end and transfers the rest with a full summary.

KNOWLEDGE ASSISTANT

Agent Assist Copilot

Listens to live calls and chats, suggests answers from the client's knowledge base and writes after-call notes automatically.

AI AGENT

Auto-QA Analyst

Scores every interaction against each client's QA form, flags compliance misses and builds coaching notes for team leads.

WORKFLOW AUTOMATION

Back-Office Process Bot

Reads incoming forms and requests, keys and validates data in client systems and queues only true exceptions for staff.

Systems we integrate with

- Contact centre (Genesys, Five9)
- CRM (Salesforce, Dynamics 365)
- Helpdesk (Zendesk, Freshdesk)
- WhatsApp Business API
- WFM tools (NICE, Verint)
- Telephony & SIP trunks
- RPA platforms (UiPath)
- BI dashboards (Power BI, Tableau)

Customised to each client

1. Train each bot on one client's scripts, policies and tone, kept fully separate from other clients.
2. Handle calls and chats in Arabic, English, Hindi and other languages each client's customers use.
3. Apply each client's QA form, compliance phrases and escalation rules to scoring and handoffs.
4. Set exactly which intents the AI resolves alone and which always go straight to a live agent.
5. Host per client region to meet data protection, call recording and residency requirements.

Business outcomes

Shorter queues
Routine contacts are resolved instantly, so peaks no longer swamp the floor.

Better agent performance
Live guidance and targeted coaching lift quality across every shift.

Full QA coverage
Every interaction is reviewed, not a sample, so risks surface early.

Stronger client renewals
Transparent reporting and steady service levels make contracts easier to keep.

START HERE · 30-DAY PILOT

Put voice and chat AI on one client's top call reasons

1 — WEEK 1
Analyse call and chat logs to pick the top routine intents and agree handoff rules.

2 — WEEK 2
Build the voice and chat flows on the client's knowledge base and test with staff.

3 — WEEK 3
Run live on a share of traffic, review transcripts and tune answers and transfers.

4 — WEEK 4
Expand to full traffic for those intents, review results with the client and plan more.

IT Services & Managed Service Providers

AI that triages tickets, patches estates and preps QBRs while engineers fix problems.

INDUSTRY OVERVIEW

MSPs and IT service firms run many client environments at once. Each day brings a flood of tickets, monitoring alerts, patch windows, new starters and leavers, licence changes and contract billing, tracked across the PSA, RMM and spreadsheets. AI triages and resolves routine tickets, handles alerts and user changes, reconciles assets and licences, and prepares billing and QBRs.

AUTOMATION POTENTIAL ●●●●●

IMPLEMENTATION ▬▬▬ Medium

TYPICAL DECISION MAKERS

- MSP Owner / CEO
- Service Delivery Manager
- Head of Managed Services

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Service Desk

1. **Ticket triage**
   Reads each ticket, sets client, category and priority, and routes it to the right queue or engineer.
2. **Password and MFA resets**
   Chat assistant verifies the user and resets passwords or MFA within each client's approved rules.
3. **L1 troubleshooting**
   Walks users through known fixes from the runbook and closes the ticket once the issue is cleared.
4. **Ticket notes and updates**
   Writes clear time entries and client updates from the engineer's actions and closes the loop.

B Monitoring & Patching

1. **Alert triage**
   Correlates RMM alerts, suppresses noise and opens one ticket with the likely cause and suggested fix.
2. **Patch management**
   Schedules patches by client window, checks success and reruns or escalates failed devices.
3. **Backup checks**
   Confirms nightly backup jobs for every client and opens tickets for any failed or missed job.
4. **Security alerts**
   Enriches endpoint and email security alerts and contains or escalates them as the playbook says.

C Users, Assets & Licences

1. **User onboarding**
   Creates accounts, mailboxes, groups and licences from the HR request and raises the device order.
2. **User offboarding**
   Disables access, converts mailboxes, recovers licences and books device collection for the leaver.
3. **Asset inventory**
   Reconciles RMM, purchase and warranty data so every client's hardware register stays current.
4. **Licence reconciliation**
   Compares assigned licences with active users and flags unused or missing seats for each client.

D Billing & Account Reviews

1. **Contract billing**
   Pulls seat counts, devices and billable time from the PSA and drafts each client's monthly invoice.
2. **Cloud and licence true-ups**
   Matches distributor and cloud invoices against what each client is billed and flags any leakage.
3. **QBR preparation**
   GenAI builds the quarterly review deck from tickets, SLAs, risks and roadmap items for each client.
4. **Renewals and upsells**
   Tracks warranty, licence and contract renewals and drafts proposals before each date arrives.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

06:00 — Overnight patch run is checked; only failed devices have tickets open.

08:30 — Morning ticket queue is triaged and routine resets have been resolved.

11:00 — New starter's account, mailbox and licences are live before they arrive.

14:30 — Licence check flags unused seats to reclaim before the next billing run.

17:30 — Draft invoices and next week's QBR decks wait for the account manager.

Signature AI solutions

BUILT FOR SERVICES

AI AGENT

Service Desk Triage Agent

Classifies, prioritises and routes every ticket, resolves resets and known fixes, and hands engineers a summary with next steps.

WORKFLOW AUTOMATION

Alert & Patch Autopilot

Correlates alerts, runs approved remediation scripts and patch schedules per client, and escalates only what a technician must see.

CHAT ASSISTANT

Joiner-Leaver Assistant

Takes starter and leaver requests in Teams or email, collects approvals and provisions or removes accounts, licences and devices.

GENAI CONTENT

QBR & Billing Builder

Reconciles seats, licences and billable time into accurate invoices, then drafts each client's QBR deck with trends and risks.

Systems we integrate with

- PSA (ConnectWise, Autotask)
- RMM (NinjaOne, N-able, Datto)
- ITSM (ServiceNow, Freshservice)
- Microsoft 365, Entra ID & Intune
- Backup (Veeam, Acronis)
- Cloud marketplaces (Pax8)
- Accounting (Xero, QuickBooks)
- Microsoft Teams & Slack

Customised to each client

1. Encode each client's SLAs, priority matrix and escalation contacts into triage and routing.
2. Limit automated fixes to scripts the MSP has approved, with change windows set per client.
3. Build onboarding and offboarding templates per client role, licence bundle and approval chain.
4. Map billing rules for every contract type: per user, per device, block hours or project.
5. Brand the user chat assistant and QBR decks with the MSP's identity and each client's logo.

Business outcomes

Faster first response
Every ticket is triaged and acknowledged the moment it lands in the queue.

Engineers on real work
Routine resets, alerts and user changes no longer fill technicians' days.

No revenue leakage
Seats, licences and billable time are reconciled before every invoice run.

Stronger client reviews
QBRs arrive with clear evidence of service delivered and risks to address.

START HERE · 30-DAY PILOT

Automate ticket triage and L1 fixes for one client group

1 — WEEK 1
Export recent tickets, map categories, priorities and SLAs, and agree auto-fix rules.

2 — WEEK 2
Connect the agent to the PSA and RMM and test triage on a set of historical tickets.

3 — WEEK 3
Run live in suggest mode with dispatchers approving, then tune routing and fixes.

4 — WEEK 4
Switch on auto-triage and approved fixes, review SLA results and plan onboarding next.

Marketing, Advertising & Media

AI that briefs, drafts, reports and schedules, so creative teams make the work.

INDUSTRY OVERVIEW

Agencies and media businesses juggle briefs, content calendars, approvals, media plans and client reporting across many accounts at once. Account teams lose hours to status updates, resizing assets, pulling campaign data and chasing feedback. AI takes over first drafts, asset variations, campaign monitoring, reporting and admin, leaving people free for strategy and ideas.

AUTOMATION POTENTIAL

IMPLEMENTATION Low

TYPICAL DECISION MAKERS

- Agency Managing Director
- Head of Client Services
- Chief Marketing Officer

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Briefs & Content

1. **Brief intake**
   Turns client emails and call notes into a structured brief with audience, message and deliverables.
2. **Copy first drafts**
   GenAI drafts posts, ads, emails and scripts in the client's brand voice for the copywriter to refine.
3. **Asset resizing and variants**
   Produces size, format and language variants of approved creative to every channel's specs.
4. **Translation and localisation**
   Adapts approved copy into Arabic, Hindi or other languages, keeping tone and brand terms intact.

B Campaigns & Media

1. **Media plan drafts**
   Builds a first media plan from the brief and past campaign results for planners to adjust.
2. **Campaign trafficking**
   Sets up campaigns, tracking tags and naming conventions in ad platforms from the approved plan.
3. **Budget pacing checks**
   Monitors spend and delivery daily and alerts the team when a campaign is over- or under-pacing.
4. **Social scheduling**
   Schedules approved posts across channels at the best times and flags comments that need a reply.

C Reporting & Insight

1. **Performance reports**
   Pulls data from ad, social and web analytics into one report with plain-language commentary.
2. **Social listening**
   Summarises brand mentions, sentiment and competitor activity into a short daily digest per client.
3. **Client status updates**
   Compiles job status from the project tool and emails each client a clear weekly update.
4. **Campaign wrap-ups**
   GenAI drafts the end-of-campaign deck with results, learnings and recommendations to review.

D Studio & Agency Admin

1. **Approval chasing**
   Routes drafts to the right approvers, sends reminders and records every comment and sign-off.
2. **Timesheets and job costs**
   Reminds staff to log time, maps hours to jobs and flags projects running over their estimate.
3. **Digital asset tagging**
   Computer vision tags images and videos by product, people and usage rights for fast retrieval.
4. **Rights and usage expiry**
   Tracks talent, music and image licence dates and warns before an expired asset stays live.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

08:00 — Overnight social listening digest is in every account lead's inbox.

10:00 — New brief has been structured, with first copy routes drafted for review.

12:30 — Pacing alert flags an underspending campaign and the planner rebalances it.

15:00 — Approved key visual has been resized into every format the plan needs.

18:00 — Weekly client reports with commentary are ready for the account manager.

Signature AI solutions

BUILT FOR SERVICES

GENAI CONTENT

Brand Voice Studio

Drafts copy, scripts and asset variants in each client's tone and guidelines, ready for creatives to refine and approve.

AI AGENT

Campaign Pacing Agent

Watches spend, delivery and results across ad platforms, alerts planners to issues and suggests budget shifts for approval.

WORKFLOW AUTOMATION

Auto Report Builder

Pulls data from every channel into branded client reports with clear commentary, delivered on the schedule each client wants.

COMPUTER VISION

Smart Asset Library

Tags and indexes images, video and audio by content, brand and usage rights so teams find and reuse approved assets quickly.

Systems we integrate with

- Ad platforms (Google Ads, Meta Ads)
- Analytics (Google Analytics)
- Social (Hootsuite, Sprout Social)
- Design (Adobe CC, Canva)
- Projects (Asana, Monday.com)
- CRM (HubSpot, Salesforce)
- DAM systems (Bynder)
- BI dashboards (Looker Studio)

Customised to each client

1. Train the content engine on each client's brand book, tone of voice and banned phrases.
2. Set approval chains per client so nothing is published or trafficked without sign-off.
3. Choose report layouts, KPIs and commentary style to match what each client's board reads.
4. Produce copy in Arabic, English and other market languages, with local cultural checks.
5. Set pacing thresholds and alert rules per campaign, channel and client budget owner.

Business outcomes

More time for ideas
Teams spend their hours on strategy and craft rather than resizing and reporting.

Faster turnarounds
Briefs move to first drafts and approved variants without days of waiting.

Better-run campaigns
Spend and delivery issues are caught early, not in the end-of-month report.

Happier clients
Clear, regular reporting shows clients exactly what their budget achieved.

START HERE · 30-DAY PILOT

Automate client reporting for one account group

1 **WEEK 1** — Agree report formats, KPIs and data sources with account leads and their key clients.

2 **WEEK 2** — Connect ad, social and analytics accounts and build the first automated reports.

3 **WEEK 3** — Run in parallel with manual reports, then tune commentary, layout and data checks.

4 **WEEK 4** — Switch clients to automated reports, gather feedback and choose the next workflow.

SECTOR 11 OF 11

Government & Non-profit

Citizen and community services delivered faster and more transparently, with every decision traceable.

INDUSTRIES IN THIS SECTOR

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Government & Public Services

AI that answers citizens, processes applications and keeps public services moving.

INDUSTRY OVERVIEW

Government entities handle a steady flow of citizen requests, licence applications, inspections, correspondence and procurement, often across separate systems and paper files. Officers spend much of the day re-keying forms, checking documents and answering repeat questions. AI takes over intake, verification, routing and reporting, so officers focus on decisions and service.

AUTOMATION POTENTIAL ●●●●○

IMPLEMENTATION ▬▬▬ High

TYPICAL DECISION MAKERS

- Chief Information Officer
- Head of Digital Transformation
- Director of Customer Service

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Citizen Services

1. **Enquiry handling**
   Bilingual chat and voice assistants answer service, fee and status questions on every channel.
2. **Application status updates**
   Sends citizens proactive updates by SMS, email or app as their application moves between stages.
3. **Appointment booking**
   Books service-centre and inspection appointments and reminds citizens what documents to bring.
4. **Complaints and feedback**
   Classifies complaints, routes them to the right department and tracks each response deadline.

B Applications & Licensing

1. **Form and document intake**
   Document AI reads submitted forms and attachments and checks they are complete before review.
2. **Eligibility pre-checks**
   Checks each application against published rules and prepares a recommendation for the officer.
3. **Licence renewals**
   Tracks expiring licences and permits, reminds holders and pre-fills renewal forms with known data.
4. **Inspection reports**
   Turns inspectors' notes and photos into a structured report with findings and follow-up actions.

C Correspondence & Records

1. **Incoming correspondence**
   Reads letters and emails, extracts the request and routes each item to the owning department.
2. **Draft replies and memos**
   GenAI drafts replies, memos and briefing notes in approved templates for an officer to sign off.
3. **Records digitisation**
   Scans and indexes paper archives in Arabic and English so files can be searched by their content.
4. **Meeting minutes**
   Transcribes committee meetings and drafts minutes with decisions and action owners listed.

D Procurement & Reporting

1. **Tender evaluation**
   Compares bids against the tender's published criteria and builds a structured evaluation summary.
2. **Invoice processing**
   Captures supplier invoices, matches them to purchase orders and routes them for approval.
3. **KPI dashboards**
   Pulls service data from each system into dashboards for leadership and performance reviews.
4. **Policy and circular search**
   Knowledge assistant answers staff questions from circulars, policies and procedures with sources.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

07:30 — Overnight online applications are checked for completeness and queued.

09:00 — Citizen assistant is answering status questions across web, app and phone.

11:30 — Officer reviews eligibility pre-checks and approves straightforward cases.

14:00 — Inspection reports from the morning visits are drafted with photos attached.

17:00 — Service KPIs and complaint trends update on the leadership dashboard.

Signature AI solutions

BUILT FOR PUBLIC

CHAT ASSISTANT

Citizen Service Assistant

Bilingual assistant on web, app, WhatsApp and phone that answers questions, tracks applications and books appointments.

DOCUMENT AI

Application Processing AI

Reads forms and supporting documents, checks completeness and eligibility rules and prepares each case for an officer's decision.

AI AGENT

Correspondence Agent

Classifies incoming letters and emails, routes them to the owning team, drafts replies in approved templates and tracks deadlines.

KNOWLEDGE ASSISTANT

Policy Knowledge Assistant

Gives staff instant, sourced answers from circulars, regulations and procedures so the public gets consistent information.

Systems we integrate with

- ERP (SAP, Oracle)
- CRM (Salesforce, Dynamics 365)
- Case management systems
- Document management (OpenText)
- Digital identity & e-signature
- Payment gateways
- WhatsApp Business API
- GIS platforms (Esri ArcGIS)

Customised to each client

1. Deploy on government cloud or on-premise to meet national data-residency and security rules.
2. Load each entity's service catalogue, eligibility rules and approval hierarchy into the agents.
3. Serve citizens in Arabic and English, with tone and terms matching official communications.
4. Set which decisions stay with officers and which simple, rule-based cases can be fast-tracked.
5. Apply the entity's identity, branding and accessibility standards on every citizen channel.

Business outcomes

Faster service delivery
Applications move through checks quickly, with officers deciding, not re-keying.

Consistent answers
Citizens get the same accurate information on every channel, at any hour.

Transparent processes
Every step, decision and override is recorded for audit and accountability.

Better use of officers
Staff time shifts from data entry to judgement, inspection and citizen care.

START HERE · 30-DAY PILOT

Automate intake and pre-checks for one licence service

1 — WEEK 1
Map the service's forms, documents, rules and approval steps with the process owner.

2 — WEEK 2
Configure document AI and the citizen assistant in a secure test environment.

3 — WEEK 3
Run live alongside officers, compare outcomes and tune rules and confidence levels.

4 — WEEK 4
Go live for the service, review turnaround and satisfaction, and pick the next service.

NGOs, Charities & Trusts

AI that handles donors, grants and reporting, so more effort goes to the mission.

INDUSTRY OVERVIEW

Charities, NGOs and trusts run on small teams and tight overheads. Every week brings donations to receipt, donors to thank, grant applications and reports to write, volunteers to schedule, beneficiary cases to manage and filings to prepare. AI handles receipting, donor communications, grant drafting, case intake and reporting, so staff spend more of their time on programmes.

AUTOMATION POTENTIAL ●●●●○

IMPLEMENTATION Low

TYPICAL DECISION MAKERS

- Chief Executive / Director
- Head of Fundraising
- Programmes Director

Day-to-day operations we automate

16 ACTIVITIES · 4 FUNCTIONS

A Fundraising & Donors

1. **Donation receipting**
   Matches online and bank donations to donors and sends receipts and tax certificates automatically.
2. **Donor thank-yous**
   GenAI writes personal thank-you messages that reference each donor's gift and the cause it funds.
3. **Lapsed donor follow-up**
   Spots donors whose giving has stopped and sends tailored re-engagement messages by email or WhatsApp.
4. **Campaign appeals**
   Drafts appeal emails, posts and landing copy in the charity's voice for each donor segment.

B Grants & Partnerships

1. **Grant prospecting**
   Searches foundation and CSR funding calls and matches each one to the organisation's programmes.
2. **Grant applications**
   Drafts proposals from the charity's past applications, impact data and the funder's questions.
3. **Funder reporting**
   Compiles programme data, photos and spend into each funder's report format before the deadline.
4. **Deadline tracking**
   Tracks application and reporting deadlines for every grant and alerts the owner in good time.

C Programmes & Beneficiaries

1. **Beneficiary intake**
   Chat and voice assistants register beneficiaries in their language and check eligibility criteria.
2. **Case notes**
   Turns field workers' voice notes into structured case records with next steps and referrals.
3. **Field data collection**
   Cleans and merges survey and mobile form data, flagging duplicates and gaps for field teams.
4. **Impact measurement**
   Aggregates outputs and outcomes against the logframe and drafts the impact narrative for review.

D Operations & Governance

1. **Volunteer coordination**
   Matches volunteers to shifts by skill and availability and sends reminders and site briefings.
2. **Expense processing**
   Captures receipts and invoices, codes them to the right grant and routes them for approval.
3. **Restricted fund tracking**
   Tracks spend against each restricted grant and warns before a budget line is overspent.
4. **Board and compliance packs**
   Prepares board papers, statutory filings and donor due-diligence documents from live records.

A day with AI

WHAT RUNS WHILE YOUR TEAM WORKS

07:30 — Overnight online donations are matched, receipted and thanked by name.

09:30 — Grant agent has found new funding calls that fit current programmes.

12:00 — Case notes from the morning's field visits are structured and filed.

15:00 — Draft funder report with figures and photos is ready for the manager.

18:00 — Tomorrow's volunteers have their shift reminders and site briefings.

Signature AI solutions

BUILT FOR PUBLIC

AI AGENT

Donor Care Agent

Receipts every gift, sends personal thank-yous and re-engages lapsed donors on email and WhatsApp, all logged in the donor CRM.

GENAI CONTENT

Grant Writing Copilot

Drafts applications and funder reports from the organisation's own programme data, past proposals and impact stories.

CHAT ASSISTANT

Beneficiary Intake Assistant

Registers beneficiaries over chat or voice in their language, checks eligibility and creates a case for the right programme team.

WORKFLOW AUTOMATION

Fund & Compliance Tracker

Codes spend to restricted funds, warns before budget lines run over and assembles board and statutory compliance packs.

Systems we integrate with

- Donor CRM (Salesforce, Blackbaud)
- Online giving (Stripe, PayPal)
- Accounting (Xero, QuickBooks)
- Mobile data (KoboToolbox, ODK)
- Email marketing (Mailchimp)
- WhatsApp Business API
- Microsoft 365 & Google Workspace
- Case management systems

Customised to each client

1. Write donor and funder messages in the organisation's own voice, languages and tone guidelines.
2. Map restricted funds, grant budget lines and approval limits from the organisation's accounts.
3. Apply strict consent, safeguarding and data-protection rules to every beneficiary record.
4. Match each funder's report template, indicators and deadlines without manual reformatting.
5. Choose which messages go out automatically and which need a staff member's sign-off first.

Business outcomes

More time for mission
Small teams spend their hours on programmes and people instead of paperwork.

Stronger donor loyalty
Every donor is thanked promptly and personally, which keeps them giving.

More grants submitted
Faster drafting lets the team apply for more of the funding that fits.

Funder confidence
Accurate, timely reports and clean fund tracking build trust with funders.

START HERE · 30-DAY PILOT

Automate donation receipting and donor thank-yous

1 **WEEK 1** — Map donation channels, receipt rules and thank-you templates with the fundraising team.

2 **WEEK 2** — Connect payment, bank and CRM data and test donor matching on recent donations.

3 **WEEK 3** — Run live with staff checking each message, then tune matching and personalisation.

4 **WEEK 4** — Go live across all channels, review donor responses and choose grant reporting next.

AT A GLANCE

Lower 1 2 3 4 5 Higher

Automation *heat map*

Where AI lifts the most load in each industry, function by function.

	INDUSTRY	CUSTOMER SERVICE	SALES & MARKETING	FINANCE	HR & PEOPLE	CORE OPERATIONS	COMPLIANCE & RISK	SUPPLY CHAIN
01	Banking	5	4	5	3	5	5	2
02	Insurance Carriers & Brokers	5	4	4	2	5	4	1
03	NBFCs, Lending & Microfinance	4	4	5	2	5	4	1
04	Wealth Management & Stock Broking	5	4	4	2	5	5	1
05	Fintech, Payments & Exchange Houses	5	3	5	2	5	5	1
06	Hospitals & Multi-specialty Clinics	5	2	5	4	4	4	3
07	Diagnostic Labs & Imaging Centres	5	3	4	2	5	3	4
08	Dental, Dermatology & Specialty Clinics	5	5	3	2	4	2	3
09	Pharmacies & Medical Distribution	4	3	4	2	5	4	5
10	Pharma & Life Sciences Manufacturing	2	3	3	3	5	5	4
11	Universities & Colleges	5	4	4	3	4	3	2
12	K-12 Schools	5	3	4	3	4	3	2
13	Training Institutes, Coaching & EdTech	5	5	3	2	4	2	1
14	Real Estate Developers	5	5	4	2	4	4	3
15	Real Estate Brokerage & Leasing	5	5	3	2	4	3	1
16	Construction & EPC Contracting	2	3	4	3	5	4	5
17	Facility & Property Management	5	2	4	3	5	4	3
18	Architecture, Engineering & Interior Design	3	4	4	2	5	3	3
19	Retail Chains & Supermarkets	4	4	3	3	5	2	5
20	E-commerce & D2C Brands	5	5	4	2	5	2	4
21	Jewellery, Fashion & Luxury Retail	5	5	3	2	4	3	4
22	Automobile Dealerships & Service Centres	5	5	4	2	5	3	4
23	Car Rental, Leasing & Fleet Operators	5	4	5	2	5	4	3
24	Salons, Spas & Fitness Centres	5	4	3	3	4	2	3

Lower 1 2 3 4 5 Higher

Automation *heat map*

	INDUSTRY	CUSTOMER SERVICE	SALES & MARKETING	FINANCE	HR & PEOPLE	CORE OPERATIONS	COMPLIANCE & RISK	SUPPLY CHAIN
25	Hotels & Resorts	5	4	4	3	5	3	3
26	Restaurants, Cloud Kitchens & Catering	5	4	3	3	5	3	5
27	Travel Agencies & Tour Operators	5	5	4	2	5	3	3
28	Events, Exhibitions & Wedding Planners	5	4	3	2	5	2	4
29	Discrete Manufacturing & Engineering	3	4	3	2	5	4	4
30	FMCG & Food Processing	3	5	4	2	5	4	5
31	Chemicals, Metals & Process Industries	3	3	3	2	5	5	4
32	Textiles, Apparel & Garments	3	4	3	3	5	4	4
33	Trading, Import-Export & Wholesale	4	5	5	2	4	4	5
34	Logistics, Freight Forwarding & Courier	5	4	4	2	5	4	4
35	Warehousing & 3PL	4	3	5	3	5	3	5
36	Shipping, Ports & Maritime	4	3	4	3	5	4	4
37	Oil, Gas & Energy Services	3	3	4	3	5	5	4
38	Utilities, Power & Renewables	5	2	4	3	5	4	3
39	Telecom & Internet Service Providers	5	5	4	2	5	3	3
40	Agriculture & Agri-business	2	4	3	3	5	4	5
41	Accounting, Audit & Tax Firms	4	3	5	3	5	5	1
42	Law Firms & Legal Services	4	3	4	2	5	4	1
43	Recruitment, Staffing & Manpower Supply	4	4	4	5	5	4	2
44	BPO & Contact Centres	5	4	3	4	5	4	1
45	IT Services & Managed Service Providers	5	3	4	3	5	4	3
46	Marketing, Advertising & Media	4	4	3	2	5	3	1
47	Government & Public Services	5	1	4	3	5	5	3
48	NGOs, Charities & Trusts	4	3	4	3	4	4	2

From idea to *live automation*

How to choose the first process, what the pilot needs, and what gets tailored for every client.

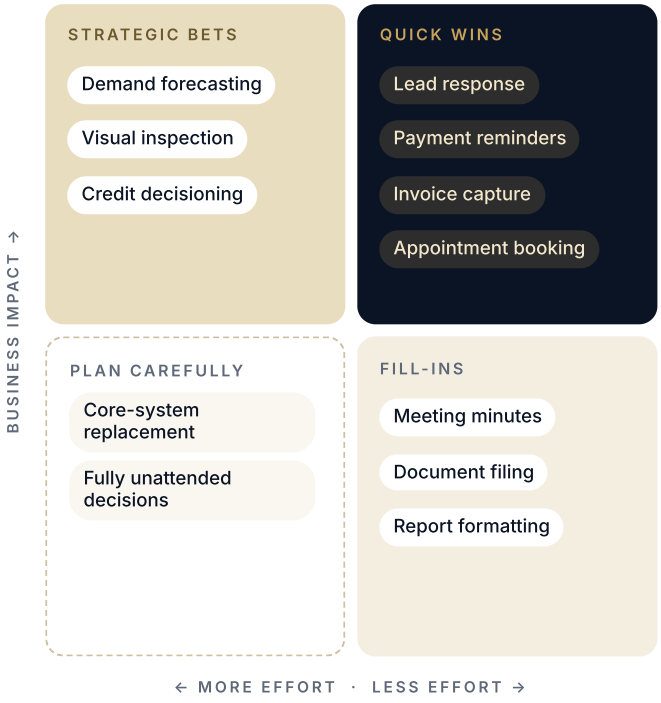
Pick the right first process

1. **High volume**
   The task happens many times a day or week.
2. **Rule-based**
   Clear inputs, clear rules, a predictable output.
3. **Painful today**
   It causes delays, errors, overtime or lost revenue.
4. **Data within reach**
   Inputs are digital or easy to capture.
5. **Easy to measure**
   Turnaround, effort or accuracy can be tracked.

What the pilot needs from the client

- ✓ A process owner who knows the work day to day
- ✓ Sample documents, messages and data from real cases
- ✓ Test access to the systems the automation will touch
- ✓ Approval rules, limits and escalation contacts
- ✓ Agreed success measures before the pilot starts

Impact versus effort



The 30-day pilot, week by week

WEEK 1	WEEK 2	WEEK 3	WEEK 4
Map & measure	**Configure**	**Run in parallel**	**Go live & review**
Walk the process with the team, collect samples and record today's baseline.	Set up the agents, rules, languages and integrations on test data.	Live cases flow through AI and staff side by side while accuracy is tuned.	Switch over, compare against the baseline and choose the next process.

CUSTOMISATION CHECKLIST

Every automation is configured around the client

Languages & tone
Arabic, English, Hindi and more, in the client's voice

Channels
WhatsApp, email, phone, web chat, portal or app

Systems
ERP, CRM, core platforms, spreadsheets or legacy screens

Rules & approvals
The client's own policies, limits and maker-checker steps

Hosting & data
Cloud, private cloud or on-premise; in-country if required

Reporting
The dashboards and MIS each manager actually reads

THE AI AUTOMATION ATLAS

Every industry. Every daily task. *Automated your way.*

Start with one process, prove the value in thirty days, then scale across the business.



48 INDUSTRIES · 11 SECTORS

EDITION 2026