

AI POSTURE REPORT

Harborline Foods (Sample)



Early · overall AI readiness

Sample · 9 employee interviews · readiness 49/100

Prepared July 4, 2026

Mapped from your people's own words · Prepared by Ailly

AI READINESS SCORECARD

Harborline Foods (Sample)

Workforce AI Fluency

50

C-

Split team: two confident daily users (Keisha 81, Priya 72), a capable middle, and four people who've never used AI at work.

Current AI Adoption

24

F

No sanctioned tool. All real usage is personal accounts — including customer pricing pasted into a free chatbot.

Opportunity & Upside

88

A-

Exceptional. ~61 hrs/week of interview-documented repetitive work: order confirmations, invoice chasing, quote writing, route notes.

Culture & Change Readiness

63

C+

7 of 9 said 'show me how' — hesitation is permission and training, not resistance. Two skeptics need proof, not pressure.

Data & Tooling

44

D

QuickBooks + a shared drive of spreadsheets. Usable for AI drafting today; order data lives in email threads.

Governance & Risk

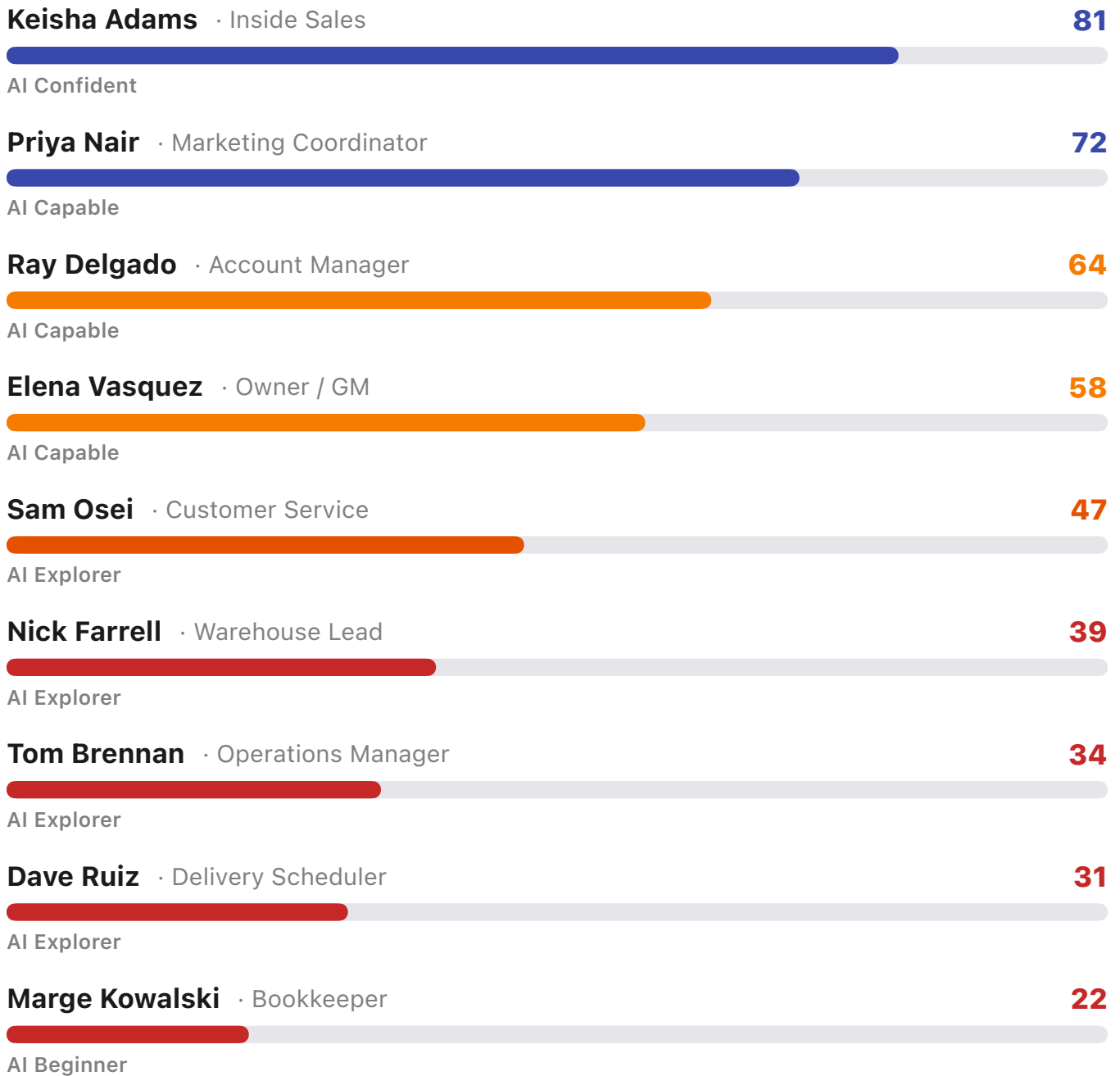
20

F

No policy, no data rules, shadow use already live. Highest-priority fix and the cheapest one.

TEAM AT A GLANCE

Every person interviewed, ranked by AI readiness



Quick wins, training, and governance

Days 1–30

- Adopt one business-tier AI tool (data protected, no training on your data)
- Publish the one-page AI policy — end personal-account use for work
- Name Keisha AI champion; move her workflow onto the approved tool

Days 31–60

- Pilot AI-drafted order confirmations with Sam (his 90 min/day)
- AI-assisted quote drafting with Keisha + Ray — target same-day quotes
- Hands-on session for Ops, taught by Keisha on real work

Days 61–90

- Invoice-chasing drafts for Marge; delivery-note summaries for Dave
- Measure: quote turnaround, hours reclaimed, response times
- Re-assess the team and report the climb to leadership

KEY STRENGTHS

- ✓ Two proven in-house champions already producing results
- ✓ Huge, well-documented pool of repetitive work to reclaim
- ✓ People asked for training — the door is open

PRIORITY GAPS

- ! Customer pricing is leaving the company via personal AI accounts
- ! No approved tool or one-page policy
- ! Quote turnaround is losing winnable business weekly

ESTIMATED IMPACT

Conservative arithmetic from what your people described, assuming the 90-day roadmap:

- Order confirmations (Sam): 35 emails/day × ~2.5 min ≈ 7 hrs/week
- Quote drafting (Keisha + Ray): 12 quotes/week × ~50 min → ~15 min ≈ 7 hrs/week
- Invoice reminders (Marge): ~4 hrs/week of drafting → ~1 hr of review ≈ 3 hrs/week
- Delivery summaries (Dave): 45 min/day ≈ 3.5 hrs/week
- Marketing production (Priya): ≈ 4 hrs/week already demonstrated on her own
- Everything else surfaced (meeting recaps, catalog updates, supplier emails): ≈ 5–8 hrs/week

Rollup: roughly 29–32 reclaimed hours per week across nine people — the equivalent of adding three-plus working days of capacity every week, or most of a full-time hire, without hiring. Separately, the quote-speed fix touches revenue directly: Elena estimates two winnable orders a week currently die in the 2-day turnaround. Even one saved order per week pays for this program many times over.

These are floor numbers, not ceilings — they assume no new automation, only drafting assistance on work your team already described.

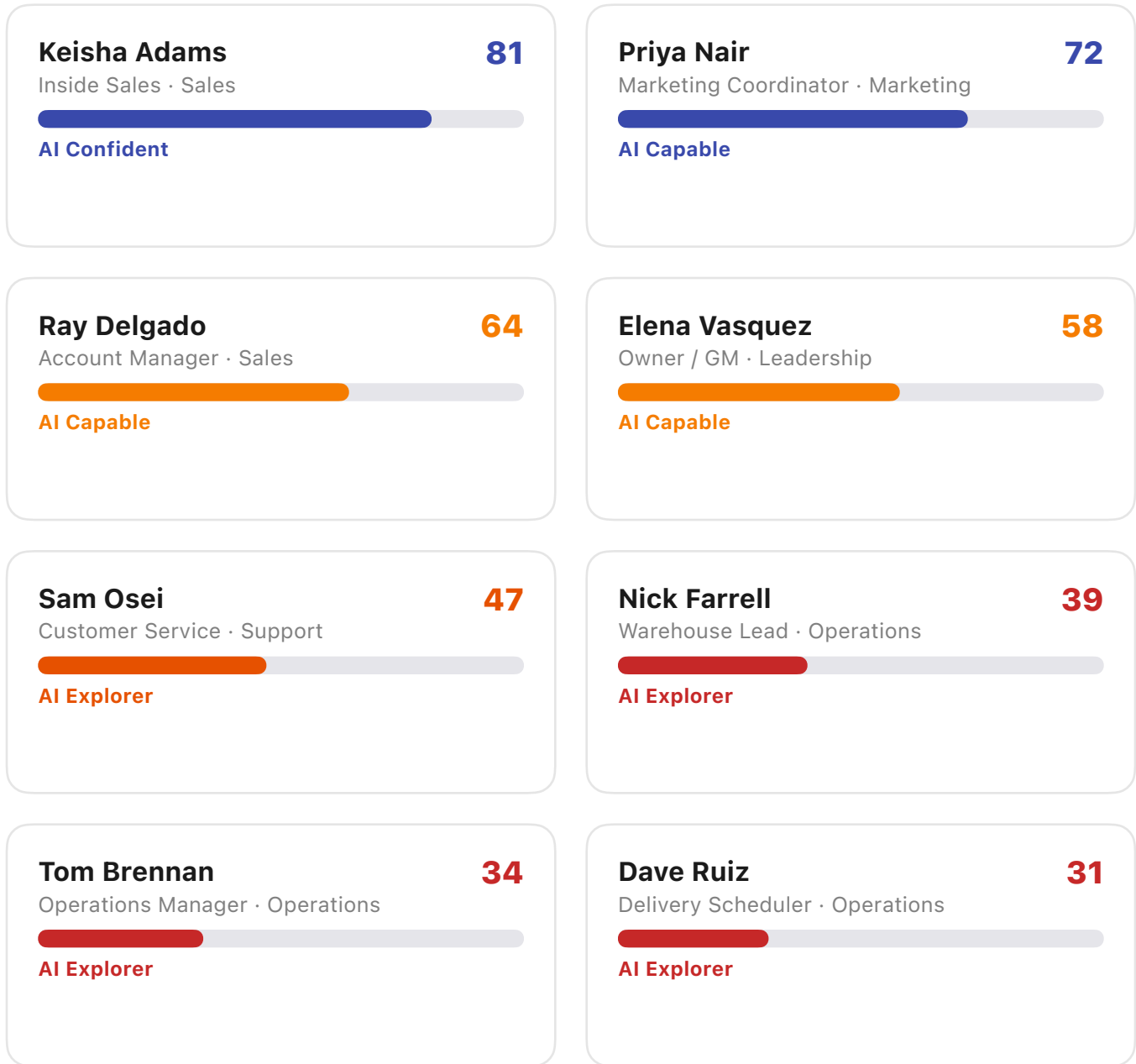
THE FIRST MOVES

Do this Monday

- 1** Approve one business-tier AI tool and tell the team it's sanctioned — this single announcement unblocks seven of nine people and ends the pricing-data risk the same day.
- 2** Name Keisha Adams your AI lead. She's already proven the quote workflow; a title makes her shadow skill the company standard.
- 3** Put "quotes out same-day" on the whiteboard as the goal — every person interviewed pointed at quote speed, unprompted.

YOUR PEOPLE

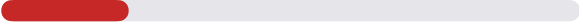
Individual profiles



YOUR PEOPLE (CONTINUED)

Individual profiles

Marge Kowalski **22**
Bookkeeper · Finance



AI Beginner

SECTION 01

Executive summary

Harborline Foods is sitting on one of the clearest AI opportunities we've assessed: a small team drowning in exactly the kind of repetitive written work AI handles best, with two employees already proving it works — unofficially, on personal accounts, without rules. The interviews surfaced roughly 61 hours per week of documented repetitive work across nine people, a live data-handling risk (customer pricing pasted into a free chatbot), and one direct revenue leak: quotes taking two days when the customers who leave cite speed. The overall posture grades a 49 (D) — not because the team can't do this, but because nothing official exists yet. That is fixable in 90 days, and the first fixes are cheap: one approved tool, a one-page policy, and your two in-house champions teaching everyone else on real work.

SECTION 02

AI readiness snapshot

This is a split team, and the split is your roadmap.

- Ahead: Keisha Adams (Inside Sales, 81/100) already drafts quotes and follow-ups with AI daily and has cut her quote-writing time roughly in half. Priya Nair (Marketing, 72/100) builds campaign copy and product descriptions with AI weekly.
- The open middle: Ray (64), Elena (58), and Sam (47) have tried AI, see the point, and asked for "someone to just show me on my actual work."
- Waiting for permission: Tom (34), Nick (39), Dave (31), and Marge (22) have never used AI at work. Not one of them pushed back on the idea — Marge asked whether it could "chase the late invoices so I don't have to write those awkward emails."

Seven of nine people asked for training in almost the same words. This is not a resistant team. It is an unled one.

SECTION 03

Where the company uses AI today

Officially: nowhere. Actually: every day, in the shadows.

- Keisha runs her entire quote workflow through a personal free-tier chatbot — including pasting customer names and negotiated pricing. She flagged this herself: "I honestly don't know if I'm allowed."
- Priya uses a personal account for marketing copy.
- Everyone else assumes it's not permitted, so 61 hours a week of automatable work continues by hand.

The pattern is the classic one: your most valuable AI behavior is already happening, but it's unprotected, unshared, and invisible to leadership.

SECTION 04

Where work gets stuck

The interviews mapped four handoffs where Harborline's speed actually dies — and three of the four are AI-compressible:

- Quotes wait on pricing. Keisha and Ray wait up to a day for lane pricing from ops before a quote can go out. AI-drafted pricing from your rate sheet, human-verified, turns a day into an hour. This is the revenue handoff.
- Customers wait on status. Sam types each update from scratch after digging through email threads — customers feel that lag as silence. Drafted updates turn 2.5 minutes into 20 seconds.
- Leadership waits on Friday. Dana's leadership recap arrives end-of-week because compiling it takes 45 minutes a day of note-gathering. Summarized driver notes make it a daily 5-minute review.
- Everyone waits on Marge's month-end. Invoice chasing bunches into a dreaded week. Drafted reminders spread it into a daily 10-minute habit — and cash arrives sooner.

SECTION 05

Top AI opportunities

1. Same-day quotes

- The opportunity: AI-drafted quotes from your price sheet, reviewed and sent by Keisha and Ray the same morning they arrive.
- The benefit: Ray and Elena both cited losing winnable orders to a 2-day turnaround while competitors answer in hours.
- First step: give Keisha's existing workflow an approved home and a price-sheet template.

2. Order confirmations and shipping updates

- The opportunity: Sam writes ~35 confirmation and status emails a day, each "basically the same three sentences."
- The benefit: about 90 minutes of his day back for the escalations that actually need a human.
- First step: collect his ten most-used emails as templates.

3. Invoice chasing

- The opportunity: Marge hand-writes every overdue-invoice reminder and dreads the tone. AI drafts firm-but-warm reminders in seconds; she reviews and sends.
- The benefit: faster collections and a task she hates removed. She asked for exactly this in her interview.
- First step: three reminder templates (gentle, firm, final) built from her best past emails.

4. Route and delivery notes

- The opportunity: Dave compiles driver notes and delivery exceptions into a morning summary by hand.
- The benefit: a 45-minute daily task becomes a 5-minute review.
- First step: standardize the driver note format so AI can summarize it reliably.

5. Product descriptions and promos

- The opportunity: Priya's campaign and catalog work, moved from her personal account to the approved tool and shared as team templates.
- The benefit: her proven workflow becomes company capability instead of personal heroics.

- First step: a shared prompt library seeded with her ten best prompts.

SECTION 06

Risks and governance

- Live now — data leaving the building: customer names and negotiated pricing are being pasted into a free personal chatbot. Not malice; the absence of an approved alternative. A business-tier tool and a one-page policy end this in week one.
- Accuracy: quotes and invoices carry numbers. The rule to institute: AI drafts, a human verifies every number before send. Marge and Sam both instinctively proposed this themselves — codify it.
- Over-reliance: keep humans on judgment calls — Ray's negotiations, Sam's angry-customer escalations. Your people already drew these lines correctly in their interviews.
- Shadow use: already present. The fix is a sanctioned better option, not a ban — a ban would simply push it further underground and lose you your champions.

SECTION 07

Training and enablement plan

- Champions: Keisha (formally name her; her quote workflow is your proof of concept) with Priya as second. Champion-taught sessions beat vendor webinars — your skeptics said so explicitly ("not another webinar," Tom).
- The open middle (Ray, Elena, Sam): one hands-on hour each on their own real tasks. They'll carry themselves after that.
- The hesitant four (Tom, Nick, Dave, Marge): pair each with a champion for one task they hate. Marge's invoice reminders are the ideal first win — high dread, low risk, instant payoff.

SECTION 08

A 90-day roadmap

Month 1 — Sanction and secure: approve one business-tier tool; publish the one-page policy; move Keisha's and Priya's workflows onto it; name champions.

Month 2 — Pilot the money-makers: same-day quotes (Keisha + Ray), order confirmations (Sam), champion-led training for Ops.

Month 3 — Spread and measure: invoice reminders (Marge), delivery summaries (Dave), shared prompt library, and a re-assessment to show leadership the climb.

SECTION 09

What good looks like in 6 months

You will know this worked when:

- Quotes go out the same morning they arrive — and you stop hearing "we went with someone faster."
- Sam's status updates are drafted, reviewed, and sent — not typed — and his afternoons go to the escalations that need him.
- Marge's invoice reminders leave daily without dread, and receivables stop bunching at month-end.
- Customer pricing never touches a personal account — everything runs through the approved tool under your one-page policy.
- The whole team has practiced on their own real work, taught by your own champions.
- Team readiness has climbed from 49 toward 70 — measured, not guessed, at your next two assessments.

SECTION 10

Metrics to track

- Quote turnaround: ~2 days → same day
- Status-email time (Sam): ~90 min/day → under 15 min/day
- Days sales outstanding: month-end bunching → steady weekly collections
- Sanctioned AI use: 0 of 9 on an approved tool → 9 of 9
- Team readiness score: 49 (D) → 70 (B-), verified at assessments 2 and 3
- Hours reclaimed: 0 → ~30/week across the team

SECTION 11

Recommended tools

- A business-tier AI assistant (e.g. ChatGPT Team or Claude Team) — drafting with a data agreement, so nothing trains on your customers.
- AI drafting inside your email (Microsoft Copilot or Gemini for Workspace) — meets Sam and Marge where they already work.
- A shared prompt library (a simple doc to start) — turns Keisha's and Priya's private skill into company capability.

SECTION 12

Readiness by department

- Sales — your engine. Keisha (81) and Ray (64) with the clearest revenue case. Lean on: Keisha.
- Operations — biggest hour pool, most hesitant people (Tom 34, Nick 39, Dave 31). Champion-taught, task-first training. Lean on: Tom once converted — the team follows him.
- Finance — Marge (22) is your lowest score and your easiest win. One template session changes her month.
- Marketing — Priya (72) is ready today; she just needs the approved tool.