OPSIAN

Illustrative sample report

Operations audit
Manufacturing and distribution

A manufacturer and distributor of building products: order-to-cash, inventory, production planning and the records behind them.

Prepared by
Opsian Technologies LLC

Engagement
Operations audit, fixed scope

Owned by
The client organisation

This sample shows the structure and depth of an Opsian audit. The organisation is invented: every name, system, figure and finding in it is illustrative and none is taken from any client. A real audit is written from your own operation and delivered as a document your organisation owns and can take to any builder.

Executive summary

Orders are won quickly and then typed three times.

The company makes and distributes building products from two plants and four warehouses. Sales are strong and the plants are well run. Between them, orders, stock and the production plan are carried by email, spreadsheets and re-keying into the ERP.

3×
times an order is keyed between quote and invoice (illustrative)

4 warehouses
each with its own count of the same stock (illustrative)

11 days
on average from delivery to invoice (illustrative)

12
recurring decisions mapped, 5 of them made without current data (illustrative)

What we found

- **Orders are re-keyed into the ERP.** Customers order by email, PDF and phone; sales coordinators type each order into the ERP, and again into the plant's job sheet.
- **Stock is counted four ways.** Each warehouse keeps a spreadsheet reconciled to the ERP weekly, so sales promise stock that has already shipped.
- **The production plan lives in one person's spreadsheet.** It is accurate, and it is a single point of failure: nobody else can rebuild it.
- **Invoices wait for paper.** Signed delivery notes travel back to the office before an invoice is raised.
- **Price exceptions are approved in chat.** Discounts are agreed correctly, but the approval cannot be found when a margin question comes up.

Recommendation. Make the order the first record. Capture each order once, from whatever channel it arrives on, and let the ERP, the plant and the warehouse read from it. Fix stock before the plan, and the plan before any forecasting. Phase one is scoped on page 6.

The four questions

Every audit answers the same four questions, none of them about AI.

They are asked of the people who run the operation, on the floor, before any system is proposed.

1 Where does the data originate?

Reachable in real time, or only as an export?

Source	What it holds	Access	Observation
ERP	Customers, orders, invoices, stock	Integration, nightly batch	The system of record, updated by hand
Order inbox	Emails, PDFs, call notes	Inbox	Where every order actually starts
Warehouse spreadsheets	Bin counts, picks, returns	Files, one per site	Four versions of stock, reconciled weekly
Production plan	Sequence, capacity, changeovers	One spreadsheet	Accurate, and held by one planner
Delivery notes	Proof of delivery, signatures	Paper	The trigger for invoicing, returned by post or photo
CRM	Quotes, pipeline, price lists	Integration, real time	Quotes are retyped when they become orders

2 What decisions are being made?

By whom, on what evidence, and how long does each one take?

Decision	Owner	Evidence used	Cycle time
Can we promise this delivery date?	Sales coordinator	A call to the warehouse	Hours, per order
What does each line run this week?	Production planner	The plan spreadsheet	Weekly, by hand
Approve this discount?	Sales director	A chat message	Minutes, unrecorded
Which warehouse ships it?	Logistics lead	Spreadsheets and phone calls	Daily
Chase or hold this invoice?	Credit controller	ERP ageing report	Weekly

3 Where does it fail today?

How is failure detected, and who absorbs it?

Failure	Severity	How it is detected	Who absorbs it
Stock promised that has already shipped	High	The customer, on the delivery date	Sales, with a credit or a rush order
Order keyed with the wrong quantity	Medium	A short delivery or a return	Warehouse and finance
Plan cannot be rebuilt without the planner	High	Not detected until it happens	Both plants
Invoice raised late	Medium	Cash-flow reporting	Finance, as working capital
Discount applied without approval	Low	Quarterly margin review	Sales leadership

4 What must be reconstructable?

What obligation exists if a decision is challenged?

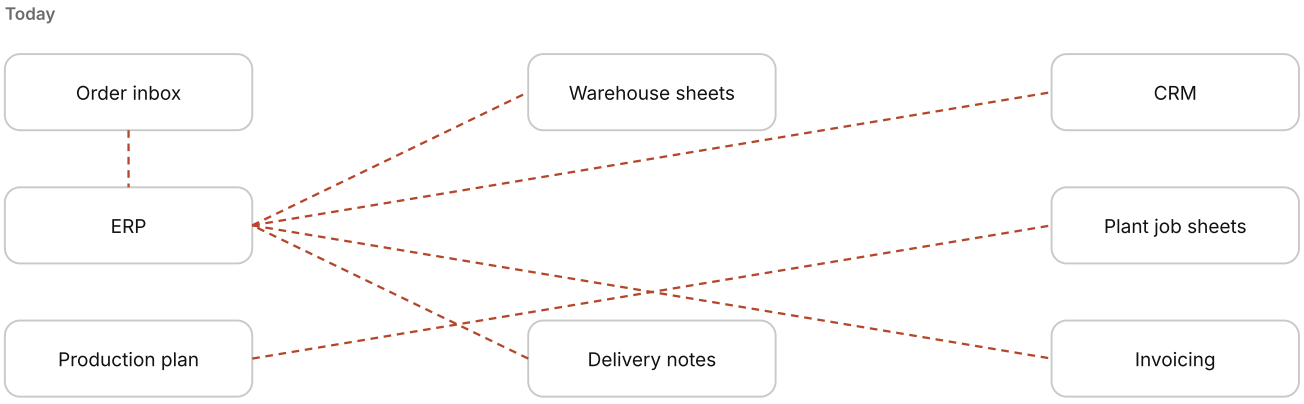
Obligation	What must be shown	Can it be shown today?
Product traceability	Which batch went to which customer	Partly from delivery notes
Customer contract terms	What price and date were agreed for each order	Partly in email
Financial audit	That each invoice matches a delivery and an approved price	No for discounts
Health and safety records	Who operated which line, with which training	Mostly
Data protection law	What is held on customer contacts, and why	Partly

Reading the answers together. Questions one and four point at the same gap. Orders, stock movements and price approvals are decided correctly, but none is captured as a record when it happens, so the company cannot trace an order from end to end. That is the finding everything else in this audit follows from.

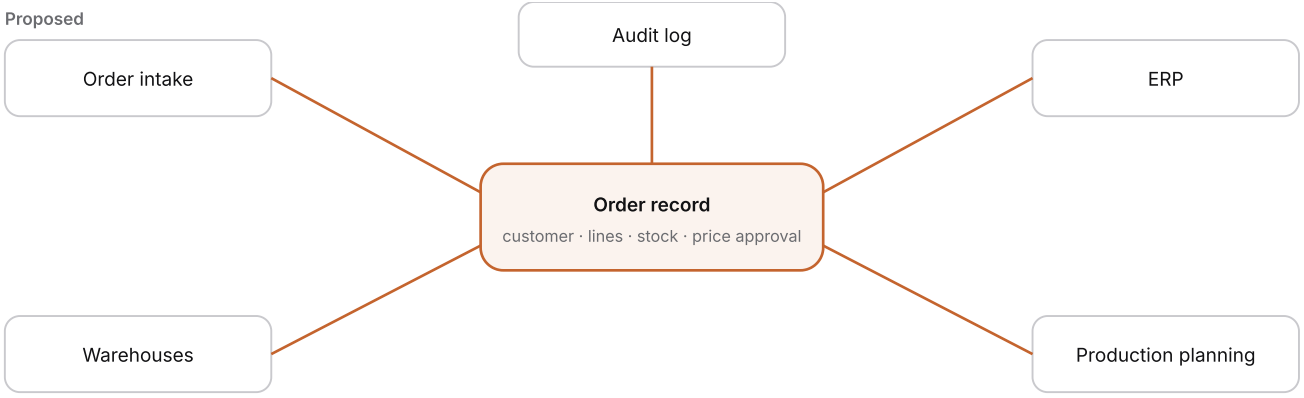
Data map

Today, every team holds part of the order.

Each line is a hand-off made by retyping, messaging or exporting. The proposed state puts one order record at the centre and lets each system read from it.



Dashed lines: retyped, messaged or exported by hand



Solid lines: read from one record, every read and write logged

Prioritised roadmap

A phased path, each phase useful on its own.

Phases are ordered by what the operation cannot do safely today. Nothing is switched off on day one, each phase delivers value before the next begins, and the organisation decides whether and when to continue.

Phase 1 · Order capture

One record per order

- Orders read from email and PDF into a draft, confirmed by staff
- Written once to the ERP and the plant's job list
- Price exceptions approved against the order

Phase 2 · Stock and dispatch

One count of stock

- Warehouse moves recorded at pick and receipt
- Proof of delivery captured on a device, not on paper
- Invoices raised from the confirmed delivery

Phase 3 · Planning

A plan others can read

- Planning rules documented and held in a shared tool
- Capacity and stock visible to sales when promising dates
- Forecasting considered only once stock is trusted

What we recommend not building. AI demand forecasting and a predictive maintenance pilot were on the original wish list. Both would learn from stock and order data that does not yet agree with itself, and both would produce numbers no one could stand behind. Revisit them after phase two.

Measures for each phase

Phase	Measured by	Baseline from this audit
Order capture	Times an order is keyed by hand	3 (illustrative)
Stock and dispatch	Days from delivery to invoice	11 (illustrative)
Planning	People who can rebuild the weekly plan	1 (illustrative)

What an audit delivers

A document your organisation owns.

The audit stands on its own. You can build from it with Opsian, with another builder or in-house, and in some cases its conclusion is that nothing should be built yet.

Delivered

- The four questions, answered for your operation
- A map of every data source and hand-off
- A decision register and a failure register
- The obligations that must be reconstructable, and the gap against each
- A prioritised roadmap with measures, including what not to build

How it runs

- Fixed scope, agreed before it starts
- Time on the floor with the people who run the operation
- Read-only access to the systems in scope
- A working session to walk through the findings
- Your data stays yours; nothing is retained after delivery without agreement

After the audit

Three ways to work with Opsian. The audit is where most engagements start; the roadmap above is written so that any of them can pick it up.

Engagement	What it is	Terms
Audit	A structured examination of the operation, delivered as a document you own.	Stands on its own. Where most engagements start.
Build	Architecture, engineering and delivery, with an evaluation harness and handover documentation.	Fixed scope. Scoped from the audit findings.
Embedded team	Opsian engineers operating as your AI function, on an ongoing basis.	Ongoing. Scaled to the operation.

Book an audit

The audit is a paid, fixed-scope engagement. Tell us about the operation and we come back with the scope, the timeline and who from Opsian will run it.

opsian.io/solutions#audit · hello@opsian.io

Opsian Technologies LLC is a US company. Delivery and infrastructure are based in the United States, and Opsian works for clients wherever they operate. This sample is illustrative: the organisation is invented, systems are named only by category, and its names, figures and findings are not taken from any client.