AI READINESS · REPORT TO THE BOARD

Conclusion: the foundations are there, the data and rules are not yet. **Start with the quotation archive**, not with tools.

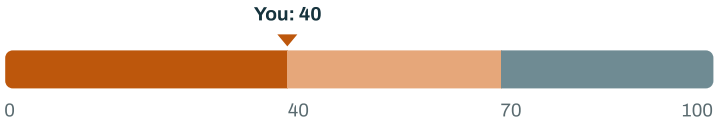
KEY FACTS

- Six months ago you bought 40 Microsoft 365 Copilot licences; six people use them regularly. You wanted to know how ready you are for artificial intelligence, where it would save the most, and what you need to fix first.
- **Assessment:** 10 areas, each scored 1–5, overall score 0–100
- **Scope:** 2 weeks, 14 interviews, 6 data sources
- **Basis:** review of systems and documents, not a self-assessment
- **Date:** 23 September 2025 · **Prepared by:** Igor Prosenik, Armes

1 Your score

40 / 100

The average score across the ten areas is 2.6 out of 5. The platform scores highest (5); data access and usage rules score lowest (1).



Important regardless of the total: data access and AI usage rules both score 1. Until you fix them, every new use case adds risk, not impact. That is why we recommend starting there.

2 Scores by area

score 1–5, key question, what we saw, next step

01 Data foundations — 4 / 5

Is key business data in systems, not on paper?

What we saw: ERP and PDM are used consistently; products, customers and orders are in the systems. Gaps exist only in older projects.

→ Keep it. This foundation enables every next step.

02 Access to key data — 1 / 5

Can people find what they need without asking colleagues?

What we saw: Around 1,000 quotations sit in the personal folders of 12 engineers. Copilot only sees the user's own folder, so it cannot find colleagues' quotations.

→ Collect the last three years of quotations in one tagged folder.

03 Data flows — 3 / 5

Does data move automatically or through manual exports?

What we saw: ERP and PDM exchange data automatically. Reports are built from monthly Excel exports, and supplier prices are retyped by hand.

→ Keep supplier prices in the ERP price list, not in spreadsheets.

04 Reporting and measurement — 2 / 5

Do you measure what you want AI to improve?

What we saw: Financial reports are regular and reliable. Quotation preparation time and win rate are not measured, so there is no baseline for impact.

→ Measure the time spent on the last 30 quotations. That is the baseline for any impact.

We score each area from 1 to 5 based on a review of systems, documents and 14 conversations. The overall score is the average, converted to a 0–100 scale (average 1 = 0, average 5 = 100).

2 Scores by area

continued

05 Current AI use — 3 / 5

Is anyone already using AI for serious work?

What we saw: Six of 40 Copilot users use it every week, for email and meeting minutes, not for quotations.

→ Reduce licences to 15 until the first use case works.

06 Data and AI platform — 5 / 5

Do you have a secure environment in which AI can work with data?

What we saw: Microsoft 365 and SharePoint are well set up, access rights are defined by department, and data is in the EU data region.

→ Do not buy a new platform. The first use case runs on the existing one.

07 Data governance — 2 / 5

Does every important data set have an owner and rules?

What we saw: Seven different quotation templates; bills of materials complete in 61% of projects. Nobody is responsible for data quality.

→ Appoint a custodian for the quotation archive and a single template.

08 System integration — 3 / 5

Do your systems exchange data with each other?

What we saw: ERP and PDM are connected. CRM is connected to nothing, and 40% of enquiries are never entered.

→ Enter every enquiry into CRM. Plan the ERP link for phase three.

09 AI ownership — 2 / 5

Is someone from the business accountable for AI impact?

What we saw: IT bought the licences. The board supports AI but has neither a target nor a budget, and nobody measures usage.

→ Appoint an owner from sales engineering with 20% of their time.

10 AI rules and risks — 1 / 5

Do employees know what they may enter into AI tools?

What we saw: There are no rules. Two engineers uploaded customer drawings covered by NDA to a free online tool.

→ Adopt usage rules and a list of approved tools within two weeks.

Under the EU AI Act, none of the proposed use cases is high-risk. The Article 4 obligation applies: employees who use AI must understand its capabilities and limits. Training in phase one covers this.

3 Where to start

the four areas that raise your score the most

AREA	YOUR TEAM DOES	ARMES DOES	WEEKS
10 AI rules and risks	The board adopts usage rules. IT prepares a list of approved tools and blocks access to others.	Draft rules and tool list, workshop with department heads, procedure for a wrong result.	2
09 AI ownership	The board appoints an owner from sales engineering with 20% of their time.	Role description, owner's targets and KPIs, monthly review with the board.	1
07 Data governance	The archive custodian introduces a single quotation template and adds tags.	Tag structure and quotation template, quality review of the first 50 quotations.	4
02 Access to key data	Engineers move the last three years of quotations into a shared folder; IT sets permissions.	Folder and access rights design, checking that search finds the right quotations.	6

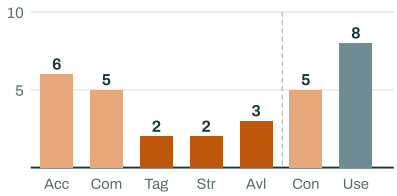
After these four steps, the overall score rises from 40 to 65 out of 100. They are also the preconditions for the first use case.

4 Data: six sources, seven criteria

score 1–10; average next to the name

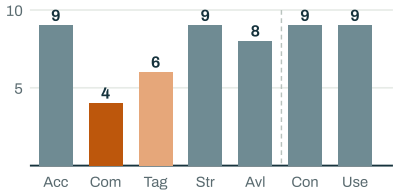
Quotation archive · 4.4

12 personal folders, no tag for quotation outcome



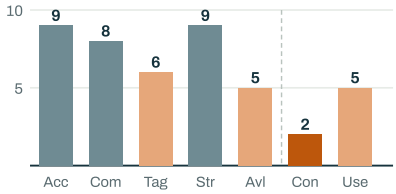
Bills of materials in ERP · 7.7

complete in 61% of projects



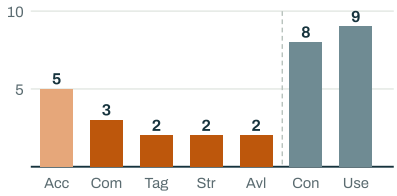
Models and drawings in PDM · 6.3

customer drawings under NDA, not for AI



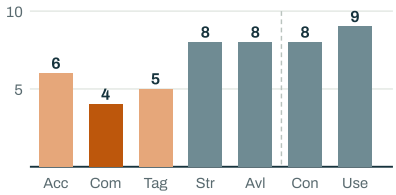
Supplier prices · 4.4

personal spreadsheets, 30% of prices over 1 year old



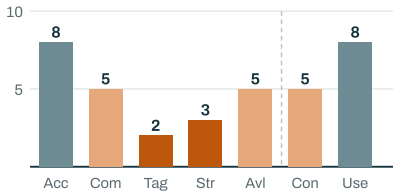
Enquiries in CRM · 6.9

40% of enquiries not entered



Service reports · 5.1

free text, names of customer contacts



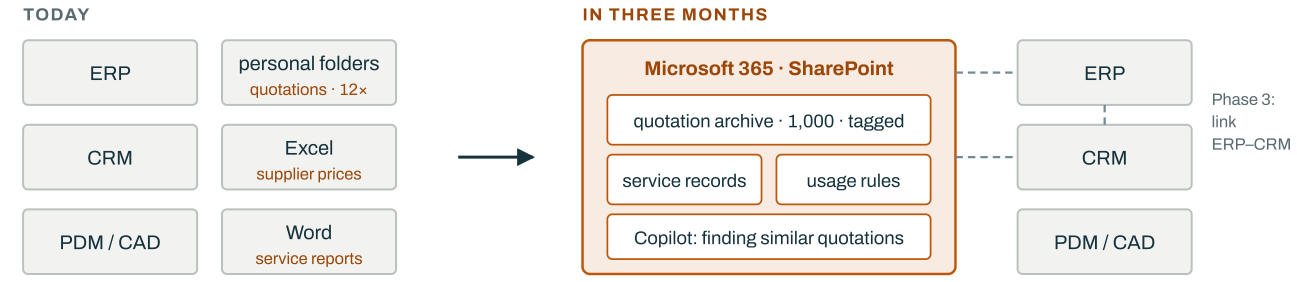
1–4 obstacle · 5–6 partial · 7–10 adequate

Acc accuracy · Com completeness · Tag tagging · Str structure · Avl availability · Con confidentiality · Use right of use (right of the line: business criteria)

We do not clean up data in advance for all use cases at once, only as much as the next step needs. For the first use case, the quotation archive is enough.

5 Systems today and in three months

no new infrastructure



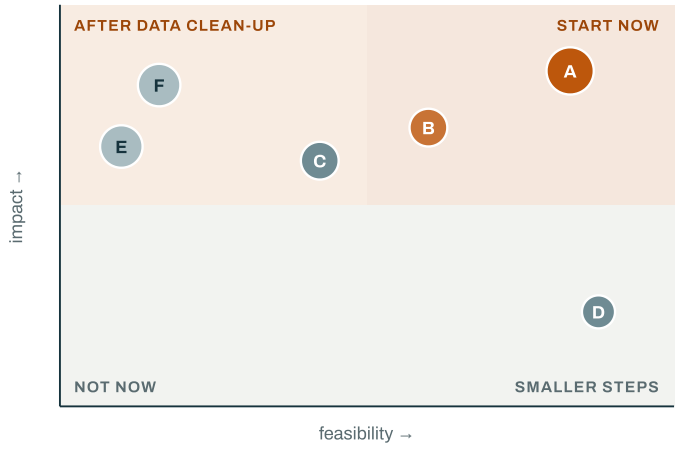
nothing is connected; Copilot sees only its own folders

customer drawings stay in PDM; only the quotation goes into the archive

6 Use cases

six candidates, ranked by value and readiness

Impact and feasibility
feasibility with today's data



	USE CASE	€K A YEAR
A	**Finding similar quotations and projects**: 1 day less per quotation	~150
B	**Pre-filling quotations** from the enquiry and a similar project	~75
C	**Ranking enquiries** by likelihood of winning	~90
D	**Summaries of service reports** for R&D and sales	~25
E	Forecasting lead times of purchased parts	high
F	Bills of materials from CAD models	high

Impact is calculated at a fully loaded engineering hour of €55 and 350 quotations a year. A: 1 day less per quotation. B: half a day, needs A and a module code list. C: two days less on 100 less likely quotations, needs 6 months of CRM data. E and F have high impact, but today they lack the data they would need.

7 Why use case A first

The most value

Engineers spend 1,400 days a year on quotations, 82% of them on quotations that are not won. One day less per quotation is worth around €150k a year.

The least risk

It runs in the existing Microsoft 365 environment, with the same access rights as today. Customer drawings stay in PDM.

It opens the next steps

A clean archive and similar-project search are preconditions for pre-filling quotations (B) and ranking enquiries (C).

8 Recommended next step

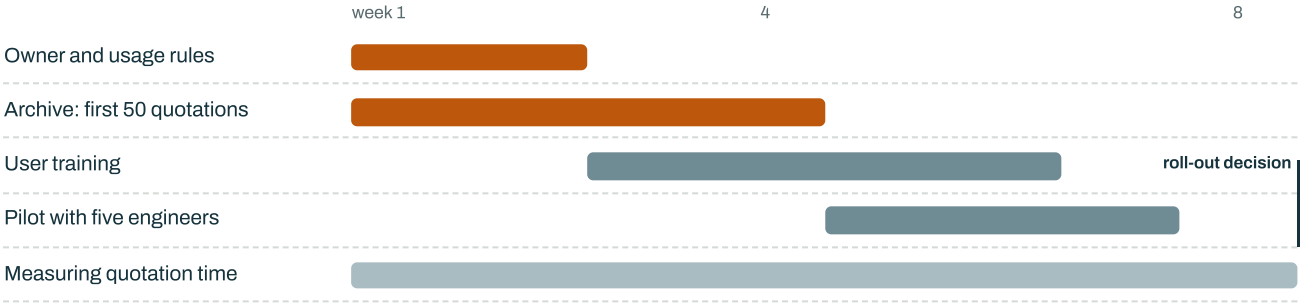
Pilot of similar-quotation search, 8 weeks

Why: it lifts the four weakest areas and at the same time shows a first measurable impact. How: with five engineers on the first 50 quotations from the cleaned archive, then rolled out to everyone.

Rules and owner
signed usage rules, list of approved tools, appointed AI owner

Clean archive
last three years of quotations in one tagged folder with a single template

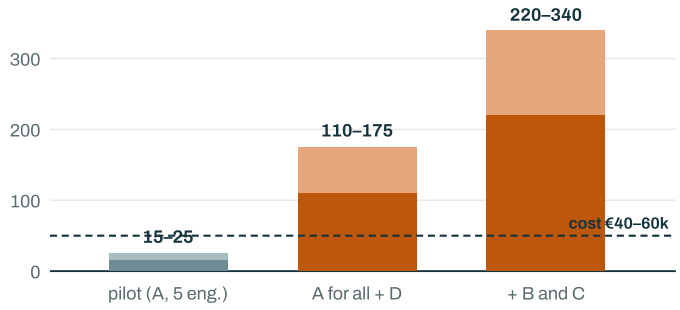
Measured impact
quotation preparation time before and after the pilot, decision on roll-out



9 What it delivers

a range, not a single number

Annual impact by phase, €k
low and high estimate; investment €40–60k over 12 months



Assumptions

- 350 quotations a year, 4 days on average, fully loaded hourly cost €55
- 60–100% of the estimated saving is realised
- investment includes licences, external support and a search engine in phase three

The two biggest risks

- **The archive is not ready in time**: the custodian gets half their working time for 6 weeks.
- **Engineers do not change their habits**: we measure usage weekly.

10 · FOR YOUR TEAM

We suggest that the heads of sales engineering, IT and engineering read this report before the presentation.

At the presentation, the board confirms the AI owner and the usage rules. The pilot can start immediately afterwards.

Questions? Get in touch

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