



AI BIZ GURU – Processes & Policy Optimization Sample Data

1. Company Overview

- **Company Name:** ElectroTech Distribution
- **Industry:** Consumer Electronics Distribution
- **Employees:** 180
- **Annual Revenue:** \$25 million
- **Regions Served:** North America (Retail and Direct-to-Consumer)

2. Processes Overview

Process Area	Current Maturity (1-5)	Standardized (Yes/No)	Automated (Yes/No)	Key Challenges	Performance Metric
Order-to-Cash (O2C)	3	Partial	No	Manual invoicing; slow collections	Days Sales Outstanding (DSO) = 65

Procure-to- Pay (P2P)	2	No	No	High emergency orders; fragmented vendor management	Average PO Cycle = 6 days
Forecast-to- Plan	2	No	Partial	Forecast inaccuracies; poor integration between sales & ops	Forecast Accuracy = 78%
Inventory Management	3	Yes	Partial	Manual processes in secondary warehouses	Inventory Turnover = 5.8
Warehouse Operations	3	Yes	Partial	Labor-intensive picking and put-away	Picking Accuracy = 98.7%
Customer Service	2	No	No	Slow complaint handling; manual CRM updates	Avg Resolution Time = 4.5 days
HR Management	2	Partial	No	Manual onboarding/offboar ding processes	New Hire Time = 30 days
IT Change Management	2	No	No	Ad-hoc system updates causing disruptions	Downtime per update = 2 hours

3. Key Policies Overview

Policy Area	Status (Formalized/Informal/None)	Last Update	Key Gaps Identified
Procurement Policy	Formalized	2022	No penalty clauses for late delivery
Inventory Management	Formalized	2021	Missing seasonal adjustment guidelines
Return/Refund Policy	Informal	2020	No SLA targets for refunds
Employee Handbook	Formalized	2019	Outdated tech remote work provisions
IT Security Policy	Formalized	2021	No incident response timeline defined
Data Privacy Policy	Informal	2020	Not GDPR-compliant fully
Risk Management Policy	None	N/A	No formal risk assessment framework

4. Priority Process Improvement Goals

Goal	Current Baseline	Target (Next 12 months)
Reduce average PO cycle time	6 days	4 days
Improve forecast accuracy	78%	90%

Increase warehouse labor efficiency	48 units/labor hour	60 units/labor hour
Improve customer complaint resolution time	4.5 days	2 days
Reduce new hire onboarding time	30 days	15 days

5. Known Constraints

- **Limited IT budget:** Max \$400k investment for 2024-2025
- **Warehouse at 85% capacity:** No physical expansion available in 2025
- **Legacy systems:** ERP (Oracle NetSuite) and WMS need upgrades
- **Change management resistance:** 35% of workforce reluctant to adopt new digital tools

6. Systems Landscape

System	Status	Challenges
ERP (Oracle NetSuite)	In Use	Needs better sales-inventory integration
WMS (Warehouse Management)	Legacy System	Upgrade scheduled in 6 months
CRM System	Basic Manual CRM	Lack of automation
HRIS (HR System)	None	Manual records and onboarding
BI / Reporting Tools	Limited	Slow manual report generation

7. Additional Context

- High product seasonality (peak in Q4)
- Manual internal audits for key processes, no workflow automation
- Priority on optimizing Order-to-Cash and Warehouse Operations first
- Company culture is open to gradual, incremental process changes rather than major disruptive overhauls