Workflow Optimization Sample Data

Required Data Files

To generate accurate workflow optimization recommendations, please provide the following data files:

1. **Employee List CSV**:
    - Format: Employee ID, Name, Department, Job Title, Salary, Overtime Cost, Work Hours/Week, Full-Time/Part-Time, Experience Level
    - Example available in the sample data section
2. **Process List CSV**:
    - Format: Process ID, Department, Process Name, Employees Involved, Monthly Hours, Automation Feasibility (%), Error Rate (%)
    - Include at least 3 key processes per department
3. **Payroll Data CSV**:
    - Format: Department, Total Salaries, Overtime Cost, Bonus & Benefits, Total Payroll Cost
    - Provide department-level summary data

Minimum Data Requirements

For a fundamental analysis, ensure you provide at least:

- Employee counts and roles by department
- Salary/compensation information
- Key processes with time estimates
- Error rates and bottlenecks for each process

If you don't have exact data for automation feasibility, provide your best estimate based on process repetitiveness, complexity, and decision-making level.

Data Quality Guidelines

For optimal results:

- Use data from the past 12 months
- Ensure consistent department names across all files
- Provide granular breakdowns of time spent on processes
- Include industry benchmarks where available

If there are missing specific data points, the AI BIZ GURU will still provide valuable insights, but may need to make assumptions that could affect the accuracy of financial projections. The analysis will indicate results, where additional data would improve accuracy.

Company Overview

MediTech Solutions is a medium-sized technology services company with 250 employees that specializes in healthcare software solutions, IT consulting, and managed services for medical facilities. The company has experienced steady growth over the past five years, but is facing increasing competition and pressure to improve operational efficiency.

1. Employee List by Department & Role

Employee ID	Name	Department	Job Title	Salary	Overtime Cost	Work Hours/Week	Full-Time/Part-Time	Experience Level
MT001	Alex Johnson	IT Development	Senior Developer	$115,000	$8,500	45	Full-Time	Senior (8+ years)
MT002	Sarah Kim	IT Development	Developer	$85,000	$5,200	42	Full-Time	Mid-level (4-7 years)
MT003	Marcus Lee	IT Development	Junior Developer	$65,000	$2,800	40	Full-Time	Junior (1-3 years)
MT004	Priya Patel	IT Development	QA Engineer	$75,000	$4,100	42	Full-Time	Mid-level (4-7 years)
MT005	James Wilson	IT Development	Technical Lead	$135,000	$7,800	47	Full-Time	Senior (8+ years)
MT006	Emma Garcia	Customer Support	Support Manager	$95,000	$3,200	40	Full-Time	Senior (8+ years)

MT007	David Chen	Customer Support	Support Specialist	$55,000	$4,800	42	Full-Time	Mid-level (4-7 years)
MT008	Linda Moore	Customer Support	Support Specialist	$52,000	$5,100	43	Full-Time	Junior (1-3 years)
MT009	Robert Smith	Customer Support	Support Specialist	$54,000	$4,700	41	Full-Time	Mid-level (4-7 years)
MT010	Olivia Brown	Customer Support	Support Specialist	$51,000	$3,900	40	Full-Time	Junior (1-3 years)
MT011	Michelle Taylor	HR	HR Director	$110,000	$2,100	40	Full-Time	Senior (8+ years)
MT012	Kevin Martinez	HR	HR Specialist	$60,000	$1,800	40	Full-Time	Mid-level (4-7 years)
MT013	Sophia Adams	HR	Recruiter	$65,000	$2,500	40	Full-Time	Mid-level (4-7 years)
MT014	Thomas White	HR	Payroll Administrator	$58,000	$3,200	42	Full-Time	Mid-level

								(4-7 years)
MT015	Rachel Jackson	Finance	Finance Director	$125,000	$3,500	45	Full-Time	Senior (8+ years)
MT016	Brian Miller	Finance	Accountant	$75,000	$4,200	42	Full-Time	Mid-level (4-7 years)
MT017	Jennifer Lopez	Finance	Accounts Receivable	$62,000	$3,800	40	Full-Time	Mid-level (4-7 years)
MT018	Michael Harris	Finance	Accounts Payable	$60,000	$3,600	40	Full-Time	Mid-level (4-7 years)
MT019	Emily Wilson	Finance	Financial Analyst	$82,000	$2,900	42	Full-Time	Senior (8+ years)
MT020	Daniel Robinson	Sales	Sales Director	$135,000	$0	45	Full-Time	Senior (8+ years)
MT021	Samantha Clark	Sales	Sales Manager	$95,000	$0	44	Full-Time	Senior (8+ years)

MT022	Christopher Lee	Sales	Account Executive	$85,000	$0	43	Full-Time	Mid-level (4-7 years)
MT023	Nicole Wright	Sales	Account Executive	$82,000	$0	43	Full-Time	Mid-level (4-7 years)
MT024	John Baker	Sales	Sales Representative	$65,000	$0	42	Full-Time	Junior (1-3 years)
MT025	Amanda Torres	Project Management	Project Director	$120,000	$5,800	45	Full-Time	Senior (8+ years)
MT026	Ryan Phillips	Project Management	Project Manager	$95,000	$6,200	46	Full-Time	Senior (8+ years)
MT027	Stephanie Nelson	Project Management	Project Manager	$92,000	$5,900	45	Full-Time	Mid-level (4-7 years)
MT028	Brandon Cooper	Project Management	Project Coordinator	$60,000	$3,500	42	Full-Time	Junior (1-3 years)
MT029	Jessica Scott	Marketing	Marketing Director	$115,000	$2,600	42	Full-Time	Senior (8+ years)

MT030	Andrew Young	Marketing	Marketing Specialist	$72,000	$1,900	40	Full-Time	Mid-level (4-7 years)

2. Payroll & Compensation Data (Departmental Summary)

Department	Total Salaries	Overtime Cost	Bonus & Benefits	Total Payroll Cost
IT Development	$1,850,000	$120,000	$370,000	$2,340,000
Customer Support	$950,000	$95,000	$190,000	$1,235,000
HR	$620,000	$35,000	$124,000	$779,000
Finance	$780,000	$65,000	$156,000	$1,001,000
Sales	$1,250,000	$10,000	$375,000	$1,635,000
Project Management	$780,000	$88,000	$156,000	$1,024,000
Marketing	$520,000	$28,000	$104,000	$652,000

3. Work Hours & Productivity

Department	Avg. Scheduled Hours/Week	Avg. Actual Hours/Week	Overtime Trend (Last 6 Months)	Absenteeism Rate	Turnover Rate (Annual)

IT Development	40	44	Increasing (+10%)	3.2%	15%
Customer Support	40	42	Stable	4.5%	22%
HR	40	41	Decreasing (-5%)	2.8%	12%
Finance	40	43	Increasing (+8%)	2.5%	10%
Sales	40	44	Stable	3.0%	18%
Project Management	40	45	Increasing (+15%)	2.2%	14%
Marketing	40	41	Stable	3.5%	16%

4. Process Data by Department

IT Development Department

Process: Software Development Lifecycle

- **Time & Labor Intensity:**
  - Hours per process per employee per month: 120
  - Number of employees involved: 15
- **Automation Feasibility:**
  - Existing automation tools: Jenkins, GitHub Actions (partial)
  - Repetitiveness of tasks: Medium (60%)
  - Complexity & decision-making level: High
- **Errors & Inefficiencies:**
  - Manual entry errors: 5%

    - Delays in completion: Often
    - Bottlenecks: Code review, QA testing

Process: Bug Tracking & Resolution

- **Time & Labor Intensity:**
    - Hours per process per employee per month: 80
    - Number of employees involved: 12
- **Automation Feasibility:**
    - Existing automation tools: Jira (partial)
    - Repetitiveness of tasks: High (75%)
    - Complexity & decision-making level: Medium
- **Errors & Inefficiencies:**
    - Manual entry errors: 8%
    - Delays in completion: Sometimes
    - Bottlenecks: Bug prioritization, documentation

Process: Code Documentation

- **Time & Labor Intensity:**
    - Hours per process per employee per month: 40
    - Number of employees involved: 10
- **Automation Feasibility:**
    - Existing automation tools: Few
    - Repetitiveness of tasks: Very High (90%)
    - Complexity & decision-making level: Low
- **Errors & Inefficiencies:**
    - Manual entry errors: 12%
    - Delays in completion: Frequent
    - Bottlenecks: Time constraints, format inconsistency

Customer Support Department

Process: Ticket Management

- **Time & Labor Intensity:**
    - Hours per process per employee per month: 130

    - Number of employees involved: 18
- **Automation Feasibility:**
    - Existing automation tools: Basic ticketing system
    - Repetitiveness of tasks: Very High (85%)
    - Complexity & decision-making level: Low to Medium
- **Errors & Inefficiencies:**
    - Manual entry errors: 10%
    - Delays in completion: Often
    - Bottlenecks: Ticket assignment, documentation

Process: Technical Issue Resolution

- **Time & Labor Intensity:**
    - Hours per process per employee per month: 100
    - Number of employees involved: 15
- **Automation Feasibility:**
    - Existing automation tools: Knowledge base (limited)
    - Repetitiveness of tasks: Medium (65%)
    - Complexity & decision-making level: Medium to High
- **Errors & Inefficiencies:**
    - Manual entry errors: 7%
    - Delays in completion: Sometimes
    - Bottlenecks: Escalation procedures, knowledge gaps

Process: Customer Communication

- **Time & Labor Intensity:**
    - Hours per process per employee per month: 60
    - Number of employees involved: 20
- **Automation Feasibility:**
    - Existing automation tools: Email templates
    - Repetitiveness of tasks: High (80%)
    - Complexity & decision-making level: Low
- **Errors & Inefficiencies:**
    - Manual entry errors: 15%
    - Delays in completion: Often

    - Bottlenecks: Response templating, follow-up tracking

HR Department

Process: Payroll Processing

- **Time & Labor Intensity:**
    - Hours per process per employee per month: 45
    - Number of employees involved: 3
- **Automation Feasibility:**
    - Existing automation tools: Basic payroll software
    - Repetitiveness of tasks: Very High (95%)
    - Complexity & decision-making level: Low
- **Errors & Inefficiencies:**
    - Manual entry errors: 6%
    - Delays in completion: Rarely
    - Bottlenecks: Time approval, tax calculation

Process: Recruitment & Onboarding

- **Time & Labor Intensity:**
    - Hours per process per employee per month: 80
    - Number of employees involved: 4
- **Automation Feasibility:**
    - Existing automation tools: Applicant tracking system (limited)
    - Repetitiveness of tasks: High (75%)
    - Complexity & decision-making level: Medium
- **Errors & Inefficiencies:**
    - Manual entry errors: 8%
    - Delays in completion: Often
    - Bottlenecks: Resume screening, documentation collection

Process: Employee Benefits Administration

- **Time & Labor Intensity:**

    - Hours per process per employee per month: 50
    - Number of employees involved: 2
- **Automation Feasibility:**
    - Existing automation tools: Few
    - Repetitiveness of tasks: High (85%)
    - Complexity & decision-making level: Medium
- **Errors & Inefficiencies:**
    - Manual entry errors: 9%
    - Delays in completion: Sometimes
    - Bottlenecks: Enrollment verification, eligibility tracking

Finance Department

Process: Accounts Payable

- **Time & Labor Intensity:**
    - Hours per process per employee per month: 90
    - Number of employees involved: 3
- **Automation Feasibility:**
    - Existing automation tools: Basic accounting software
    - Repetitiveness of tasks: Very High (90%)
    - Complexity & decision-making level: Low
- **Errors & Inefficiencies:**
    - Manual entry errors: 7%
    - Delays in completion: Sometimes
    - Bottlenecks: Invoice approval, documentation matching

Process: Financial Reporting

- **Time & Labor Intensity:**
    - Hours per process per employee per month: 70
    - Number of employees involved: 5
- **Automation Feasibility:**

    - Existing automation tools: Spreadsheet templates
    - Repetitiveness of tasks: High (80%)
    - Complexity & decision-making level: Medium
- **Errors & Inefficiencies:**
    - Manual entry errors: 5%
    - Delays in completion: Often at month-end
    - Bottlenecks: Data consolidation, verification

Process: Budget Management

- **Time & Labor Intensity:**
    - Hours per process per employee per month: 60
    - Number of employees involved: 4
- **Automation Feasibility:**
    - Existing automation tools: Spreadsheets
    - Repetitiveness of tasks: Medium (60%)
    - Complexity & decision-making level: High
- **Errors & Inefficiencies:**
    - Manual entry errors: 4%
    - Delays in completion: Sometimes
    - Bottlenecks: Department approvals, variance analysis

Sales Department

Process: Lead Management

- **Time & Labor Intensity:**
    - Hours per process per employee per month: 100
    - Number of employees involved: 12
- **Automation Feasibility:**
    - Existing automation tools: Basic CRM
    - Repetitiveness of tasks: High (80%)
    - Complexity & decision-making level: Medium

- **Errors & Inefficiencies:**
    - Manual entry errors: 12%
    - Delays in completion: Often
    - Bottlenecks: Lead qualification, data entry

Process: Proposal Generation

- **Time & Labor Intensity:**
    - Hours per process per employee per month: 80
    - Number of employees involved: 8
- **Automation Feasibility:**
    - Existing automation tools: Templates
    - Repetitiveness of tasks: Very High (85%)
    - Complexity & decision-making level: Medium
- **Errors & Inefficiencies:**
    - Manual entry errors: 10%
    - Delays in completion: Sometimes
    - Bottlenecks: Pricing calculation, customization

Process: Sales Reporting

- **Time & Labor Intensity:**
    - Hours per process per employee per month: 40
    - Number of employees involved: 15
- **Automation Feasibility:**
    - Existing automation tools: Spreadsheets
    - Repetitiveness of tasks: Very High (90%)
    - Complexity & decision-making level: Low
- **Errors & Inefficiencies:**
    - Manual entry errors: 15%
    - Delays in completion: Weekly
    - Bottlenecks: Data collection, formatting

Project Management Department

Process: Project Planning

- **Time & Labor Intensity:**
    - Hours per process per employee per month: 90
    - Number of employees involved: 8
- **Automation Feasibility:**
    - Existing automation tools: Project management software (partial)
    - Repetitiveness of tasks: Medium (50%)
    - Complexity & decision-making level: High
- **Errors & Inefficiencies:**
    - Manual entry errors: 6%
    - Delays in completion: Sometimes
    - Bottlenecks: Resource allocation, timeline creation

Process: Status Reporting

- **Time & Labor Intensity:**
    - Hours per process per employee per month: 50
    - Number of employees involved: 12
- **Automation Feasibility:**
    - Existing automation tools: Templates
    - Repetitiveness of tasks: Very High (90%)
    - Complexity & decision-making level: Low
- **Errors & Inefficiencies:**
    - Manual entry errors: 8%
    - Delays in completion: Weekly
    - Bottlenecks: Data collection, consolidation

Process: Resource Allocation

- **Time & Labor Intensity:**
    - Hours per process per employee per month: 60
    - Number of employees involved: 8
- **Automation Feasibility:**
    - Existing automation tools: Spreadsheets
    - Repetitiveness of tasks: High (75%)
    - Complexity & decision-making level: Medium

- **Errors & Inefficiencies:**
    - Manual entry errors: 10%
    - Delays in completion: Often
    - Bottlenecks: Availability tracking, skill matching

Marketing Department

Process: Campaign Management

- **Time & Labor Intensity:**
    - Hours per process per employee per month: 100
    - Number of employees involved: 6
- **Automation Feasibility:**
    - Existing automation tools: Basic marketing automation
    - Repetitiveness of tasks: High (70%)
    - Complexity & decision-making level: Medium
- **Errors & Inefficiencies:**
    - Manual entry errors: 8%
    - Delays in completion: Sometimes
    - Bottlenecks: Approval workflow, content creation

Process: Analytics Reporting

- **Time & Labor Intensity:**
    - Hours per process per employee per month: 60
    - Number of employees involved: 4
- **Automation Feasibility:**
    - Existing automation tools: Spreadsheets, basic dashboards
    - Repetitiveness of tasks: Very High (95%)
    - Complexity & decision-making level: Low
- **Errors & Inefficiencies:**
    - Manual entry errors: 12%
    - Delays in completion: Weekly
    - Bottlenecks: Data extraction, formatting

Process: Content Creation

- **Time & Labor Intensity:**
  - Hours per process per employee per month: 90
  - Number of employees involved: 5
- **Automation Feasibility:**
  - Existing automation tools: Few
  - Repetitiveness of tasks: Low (30%)
  - Complexity & decision-making level: High
- **Errors & Inefficiencies:**
  - Manual entry errors: 5%
  - Delays in completion: Often
  - Bottlenecks: Review cycles, coordination

5. Performance Metrics Reports

Department	Key Performance Indicators	Current Performance	Industry Benchmark	Gap
IT Development	Code deployment frequency	2 per month	4 per month	-50 %
IT Development	Bug resolution time	5.2 days	3 days	-73 %
IT Development	Code review completion	48 hours	24 hours	-100 %
Customer Support	First response time	4.5 hours	2 hours	-125 %
Customer Support	Ticket resolution time	2.8 days	1.5 days	-87 %
Customer Support	Customer satisfaction	82%	90%	-8%

HR	Time-to-hire	35 days	25 days	-40 %
HR	Employee satisfaction	78%	85%	-7%
HR	Onboarding completion	10 days	7 days	-43 %
Finance	Invoice processing time	4.5 days	2 days	-125 %
Finance	Budget variance	±8%	±5%	-3%
Finance	Report delivery timeliness	85% on time	95% on time	-10 %
Sales	Lead conversion rate	18%	25%	-7%
Sales	Sales cycle length	75 days	60 days	-25 %
Sales	Proposal acceptance rate	35%	45%	-10 %
Project Management	On-time delivery	70%	85%	-15 %
Project Management	Budget adherence	±12%	±8%	-4%
Project Management	Resource utilization	75%	85%	-10 %
Marketing	Campaign ROI	2.8x	3.5x	-0.7x
Marketing	Lead generation cost	$35 per lead	$25 per lead	-$10

Marketing	Content production rate	5 assets/week	8 assets/week	-3

6. Standard Operating Procedures (SOPs) - Excerpts

IT Development SOP: Code Review Process

1. Developer completes code and creates pull request
2. Team lead assigns reviewers manually
3. Reviewers check code quality (manual process)
4. Developer addresses feedback (multiple cycles)
5. QA team tests functionality (manual testing)
6. Team lead approves and merges the code
7. Documentation is updated (often delayed)

Customer Support SOP: Ticket Resolution

1. Customer submits ticket via email or portal
2. Support specialist manually categorizes the ticket
3. Support specialist researches the issue (knowledge base)
4. Initial response sent to customer (templated)
5. Problem resolution steps implemented
6. Ticket update and notes added manually
7. Resolution confirmation and ticket closure
8. Customer satisfaction survey sent manually

HR SOP: Employee Onboarding

1. HR receives hiring documentation
2. HR manually creates an employee profile
3. Equipment requests submitted via email
4. Access permissions requested via IT ticketing
5. Orientation scheduled via calendar invites
6. Paperwork completed in person

7. Training materials are assigned manually
8. Onboarding checklist tracked in a spreadsheet

Finance SOP: Monthly Financial Reporting

1. The department manually collects data from systems
2. Data exported to spreadsheets
3. Manual reconciliation of accounts
4. Creation of financial statements
5. Manual variance analysis
6. Report formatting and preparation
7. Executive review and feedback cycle
8. Distribution via email to stakeholders

7. Process Flow Diagrams - Descriptions

IT Development: Software Release Process

1. Requirements gathering (manual meetings)
2. Development planning (spreadsheet tracking)
3. Coding phase (individual assignments)
4. Manual code reviews
5. Quality assurance testing (partially automated)
6. Documentation updates (manual)
7. Deployment preparation (partially automated)
8. Release and monitoring (manual verification)

Customer Support: Escalation Process

1. Tier 1 support receives a ticket
2. Manual troubleshooting using the knowledge base
3. If unresolved, manual reassignment to Tier 2
4. Tier 2 investigation (email communication)
5. If needed, manual escalation to Development

6. Development team review (email threads)
7. Solution implementation
8. Manual communication back through tiers

Finance: Invoice Processing

1. Invoices received via email/mail
2. Manual data entry into the accounting system
3. Manual matching with purchase orders
4. Approval routing via email
5. Manual payment processing
6. Record updating in the financial system
7. Filing and documentation (partial digital)
8. Month-end reconciliation (spreadsheets)