AI OPPORTUNITY AUDIT · 3 NOVEMBER 2026

ASG OS: grow the engineers, not the back office.

You want to grow from about 15 engineers to 30 while the service desk stays at around six. Everything we found across 22 processes comes back to three things.

1

Keep the work you've already earned

Every quote owned and followed up, large bids watched, lost quotes given a second chance, and every client looked after on a rhythm that suits their tier.

£922k

revenue a year within reach (about £231k at margin)

2

Grow the engineers, not the back office

The chasing, gathering and drafting move to the system, so the same desk supports twice the engineers and senior time goes back on the business.

6 hires

avoided at 30 engineers, about £228k a year

3

Run ASG from one place

One brain connected to Simpro, Sage, Job Logic and SharePoint. The numbers live, the ASG way written down once, and every team reporting up each week.

Live

leads, quotes, conversions and debtors, without chasing anyone

HOW WE'D SOLVE EACH

What you told us, what should happen, how we help

1 Keep the work you've earned

YOU TOLD US

80 quotes a month; 55% won by number, 28% by value. 28% on £150k to £500k bids. £2.4m of repair quotes without an outcome. ~£200k a year of maintenance lost from finished projects.

WHAT SHOULD HAPPEN

An owner and next action on every quote, large bids flagged, a reason on every close, a second approach on every loss, and a touchpoint rhythm per tier.

HOW WE HELP

Quote chasing and recovery agent; churn-risk and touchpoint agent; a defined after-the-job process: close-out pack, maintenance quote, named handover to service, courtesy call.

2 Grow the engineers, not the back office

YOU TOLD US

15 to 30 engineers with the desk at about six. 270 to 450 hours a year of senior time on invoice checks. Reports rewritten by the desk; POs and supplier dates chased by hand.

WHAT SHOULD HAPPEN

Engineers capture once on site, drafts are ready to check, and every invoice arrives with its evidence gathered. People keep every decision.

HOW WE HELP

A site flow built for engineers: job pack on their phone, tap-through checklist, variations flagged on the spot, reports drafted for the PM to check. Plus the supplier-invoice review pack.

3 Run ASG from one place

YOU TOLD US

"Good at reporting down, need our guys reporting up." 14 Simpro exports a month built by hand. Knowledge and survey notes held by individuals.

WHAT SHOULD HAPPEN

One version of the truth: live trends for leads, quotes, conversions and debtors; the ASG way written once; each team reporting its own numbers weekly.

HOW WE HELP

ASG OS: the central brain, dashboards and the weekly report-up, used by the team and their AI tools alike. It connects to Simpro, Sage and AutoEntry, Job Logic (by export) and SharePoint. None of your core systems are replaced, engineers get nothing new to log into, and eight hand-carried routes stop.

THE PLAN

In order, money first

Quotes first, then the foundations, then out across the business. Two-week sprints, with findings presented to you at the end of each.

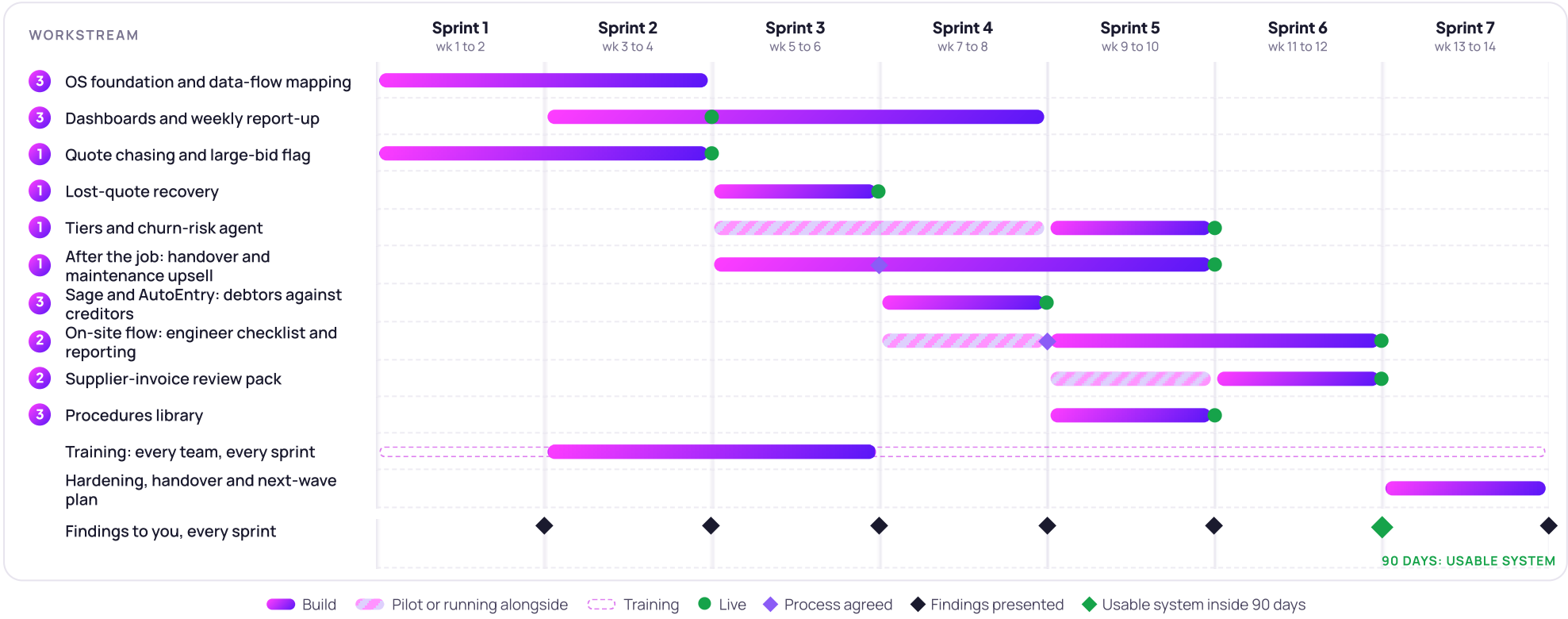
1
1 Win and recover quotes
SPRINTS 1 AND 2

2
3 One place to run it from
SPRINTS 1 TO 4

3
1 Keep every client
SPRINTS 3 TO 5

4
2 Admin off the desk
SPRINTS 4 TO 6

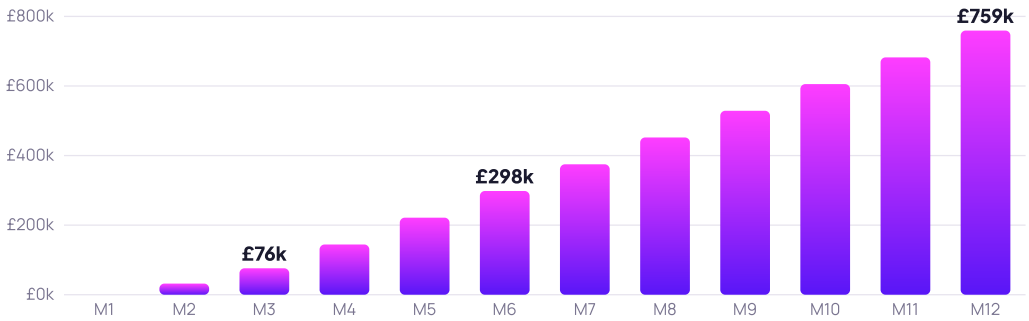
5
2 Free up senior time
SPRINTS 5 TO 7



Green dots mark where each piece goes live; the forecast counts its revenue a little after that. Marketing track (AI video editing, Claude projects) in sprints 2 and 3.

THE FORECAST

How the value builds in year one



Cumulative revenue as each piece goes live: about £759k in the first year (around £190k at margin), then about £922k a year once everything runs. Hires avoided and time released come on top.

WHAT WAITING COSTS

£77k
of revenue within reach goes unclaimed each month (about £19k at margin; ~£18k a week)

£231k
of first-year revenue forgone if the start slips three months (about £58k at margin)

80 hrs
of team time a month on work the system would take on, worth about £3.2k, kept separate

LEVER	BASIS (FROM OUR CONVERSATIONS)	A YEAR
1 Large bids	~48 bids of £150k to £500k (40 so far this year), average ~£300k, +3 points of win rate. Your target of 35% would be +7.	**£432k**
1 Repair quotes	10% of the ~£2.4m left without an outcome last year (assumption).	**£240k**
1 Maintenance	Half of the ~£200k a year you estimated is lost from finished projects.	**£100k**
1 Clients kept	One tier 2 relationship kept, around £150k a year.	**£150k**
2 Desk held at six	At 30 engineers: 12 desk staff the old way, 6 with the OS. £38k per role (assumption).	**£228k**

Revenue, hires avoided and time are different kinds of value and aren't added together. Assumptions are replaced with your own data in sprint 1. Margin of 25% in line with the job examples you showed us.

NEXT STEPS

You now know how ASG can do all three

1 Keep the work it's already earned 2 Grow the engineers, not the back office 3 Run the business from one place

1

Agree the plan

Confirm the order and name one owner for each part of the OS.

2

Sprint 1 starts

We map how your information flows, connect Simpro and set the starting numbers from your own data.

3

Findings every two weeks

At the end of each sprint we show you what's built, what we found and what's next.

INVESTMENT

Staged, so you're never committed blind

We'll walk through the investment options together. Whichever you choose, the work runs in two-week sprints with a review at the end of each, so you see the results before the next piece starts.



Kaiyan Ali
Founder, Montaj Digital · kaiyan@montajdigital.io · asg-follow-up.vercel.app