



AI Opportunity Map

Project Information Management

Prepared for

XYZ Landscape Architecture Firm

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Table of Contents

Decision

Executive Summary	04
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Current Position

Project Scope & Solution Criteria	07
Key Findings	08
Opportunity Prioritisation	09

Recommended Actions

Recommended Solution	11
90-Day Implementation Roadmap	14
Next Steps	15

Appendix

A · ROI Model & Assumptions	17
B · Opportunity Register	18
C · Feasibility Evidence & Tool Checks	19

Decision

What the engagement concluded, what it is estimated to be worth, and how quickly it pays for itself.

Executive Summary

Context

The owner runs a solo landscape architecture practice and wanted to understand where AI could create value in the business and whether it could free more time for design and higher-value client work.

Discovery showed that the largest recurring operational burden sits around **project correspondence and project records**. The workflow is repeated every day, spans several tools, and combines avoidable administration with work that still requires professional judgment. The owner estimates the broader burden at roughly **2–3 hours per day**.

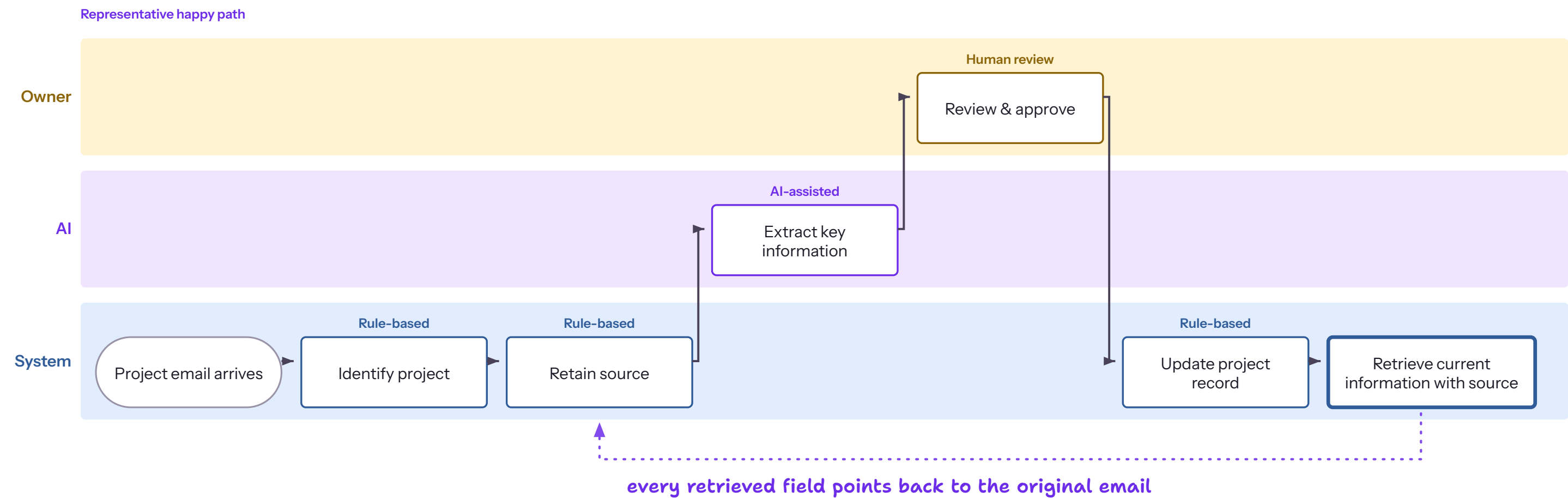
This Map therefore focuses on the workflow with the clearest combination of repetition, operating friction and improvement potential.

Recommended solution

Automated Project Information Workflow

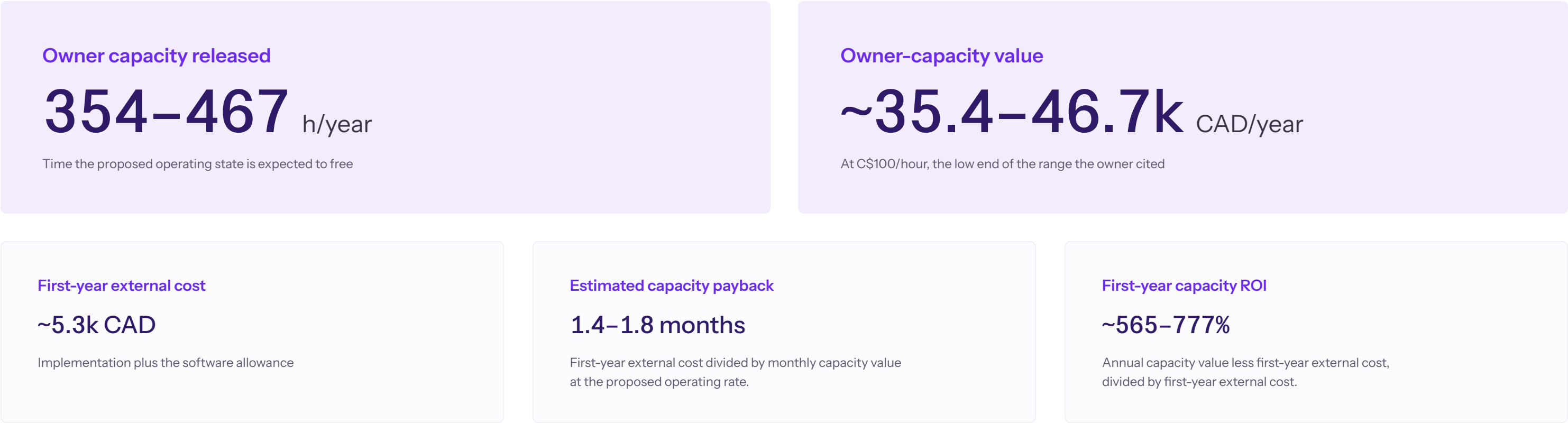
Turn the current manual project-information process into one source-linked automated workflow. The owner shifts from manually maintaining the project record to reviewing drafted information, handling exceptions and making the professional decisions that still require judgment.

Start with the foundation and rules-based automation. Add AI only if the measured rules-only result leaves enough value to justify a pilot.



Estimated Outcomes

The estimates below show the potential owner capacity released by the proposed AI-pilot operating state and its equivalent value.



Illustrative planning estimates of potential capacity value, not guaranteed cash savings or revenue. Payback is a capacity-value equivalent at the proposed operating rate, not a cash break-even date from project kickoff. Inputs and assumptions are in Appendix A.

Current Position

What the workflow actually does today, where the effort goes, and which opportunities are worth acting on first.

Project Scope & Solution Criteria

This Map focuses on project correspondence and project record management.

In scope

- Project email and correspondence
- Attachments, memos and reference documents carrying project information
- Preservation of original source material
- The Excel-based project record / worklog
- Deadline and status handling
- Retrieval of project requirements, decisions and dates

Out of scope

- Bookkeeping and invoice follow-up
- Drawing production and design generation
- Firm-wide transformation
- Production-ready implementation specification

Solution criteria

- Reduce avoidable handling time
- Reduce repeated entry across multiple places
- Make current project information easier to retrieve
- Preserve traceability to original source material
- Keep professional judgment and consequential approvals with the owner
- Avoid excessive review or maintenance burden

Key Findings

Finding 1

Project information is fragmented across several working records

Email, saved PDFs, Excel and calendar each hold part of the project record. The current process preserves useful information, but it requires additional manual work to create a usable current view.

Finding 3

Administrative handling and professional judgment are intertwined

Project identification, copying and status updates can often follow rules. Deciding whether an instruction changes a design, obligation or professional response cannot be treated as the same type of work.

Finding 2

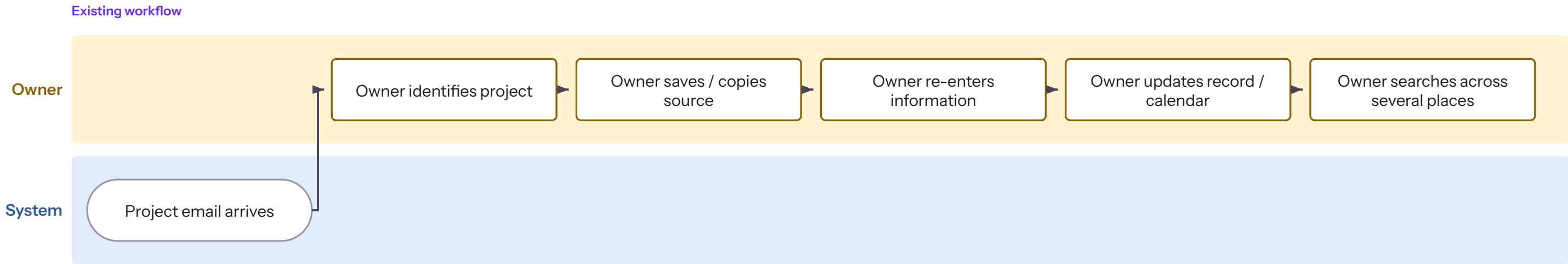
The same information is handled more than once

Correspondence may be saved, summarised, categorised and transferred again into calendar or later searched across several locations. This creates repeatable administrative work around information that already exists.

Finding 4

Structure needs to come before broader AI automation

A reliable project identifier, a structured working record and representative examples are prerequisites for measuring whether AI-assisted extraction is accurate and worthwhile.



Opportunity Prioritisation

Based on the current workflow and key findings, several improvement opportunities were identified and compared across impact, effort, readiness and ongoing operating burden.

Prioritisation criteria

Business impact

Potential reduction in handling time, retrieval friction and record risk.

Implementation complexity

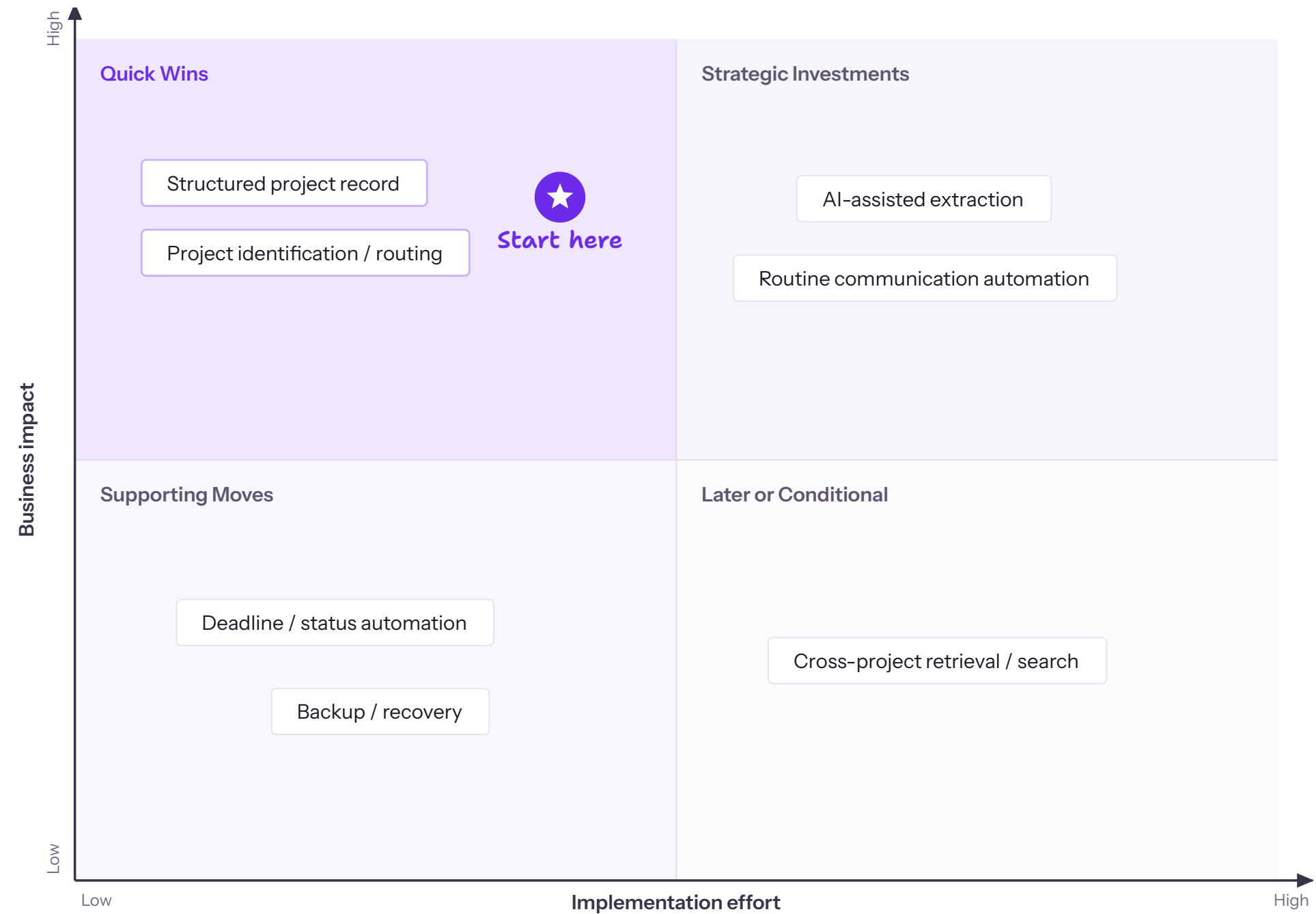
Technical setup, workflow change and testing required.

Readiness & dependencies

Whether the required identifiers, records, access and representative examples already exist.

Ongoing operating burden

Software cost, human review, maintenance and owner involvement after launch.



Note. Start here identifies the two recommended foundation opportunities. Opportunities are grouped into qualitative bands, not scored; position within a band does not indicate ranking.

Recommended Actions

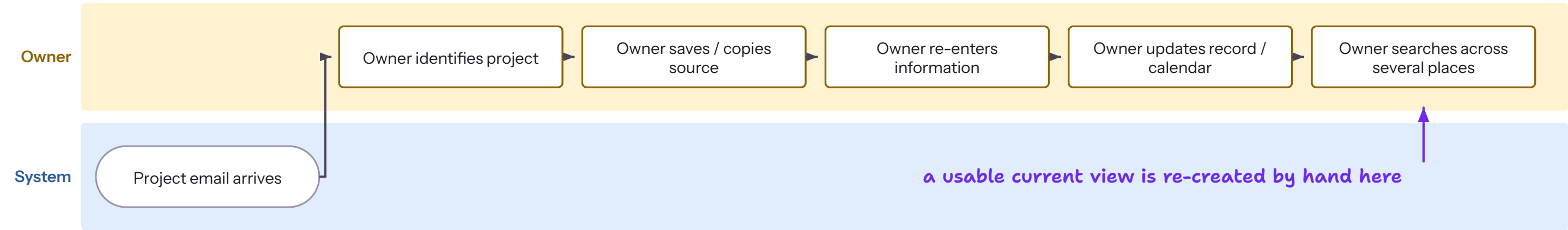
What is proposed, how it is built, what it costs, and what happens next.

Current vs. Proposed Workflow

One source-linked workflow replaces the current manual process: repeatable administration automated, professional control and traceability preserved.

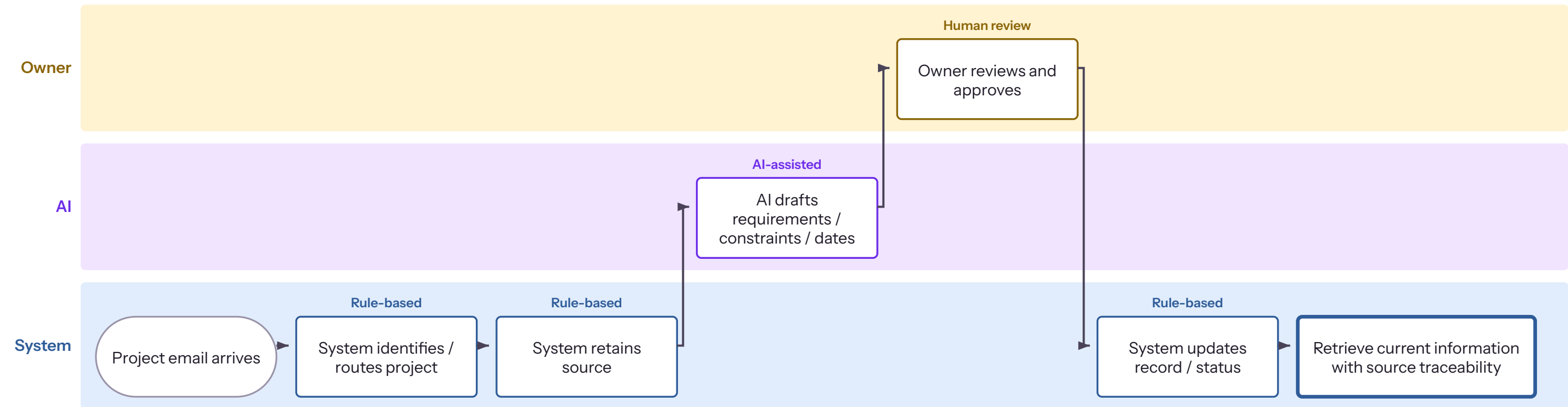
Current

Two roles participate. Every step after the email arrives is performed by the owner.



Proposed

Three roles participate. This diagram shows the normal path. Exceptions, ambiguous matches and judgment calls remain with the owner.



Technology & Tools

The solution builds on the current stack. Email, calendar, Excel and storage stay where they support the workflow; new technology is added only where they cannot meet a required capability reliably.

Capability	Current / candidate direction	Treatment
Email / source communication	Current Outlook-based email environment; exact account configuration to confirm	Keep
Calendar	Google Calendar	Keep / configure
Structured project record	Excel initially	Keep / restructure
Routing / deterministic rules	Native mail rules / filters where account fit allows	Configure
Storage / recovery	Existing local + cloud storage with tested export / restore	Strengthen
AI-assisted extraction	Business AI service selected after account, data and contractual review	Add for pilot only
Broader automation platform	Selected only if later expansion is justified	Conditional

Real project content remains outside an external AI service until the relevant account terms, data handling and contractual conditions have been confirmed.

Estimated ROI

Each stage, the capacity it releases and what that capacity is worth. Cost, return and payback are shown once, against the end state.

Improvement	Monthly capacity	Annual capacity	Capacity rate	Annual capacity value	Year 1 external cost	Year 1 ROI	Estimated payback
Rules automation	~19–31 h	229–375 h	C\$100/h	C\$22.9–37.5k	—	—	—
AI-assisted extraction incremental beyond rules-only	~8–10 h	92–125 h	C\$100/h	C\$9.2–12.5k	—	—	—
Proposed AI-pilot state total end state	~30–39 h	354–467 h	C\$100/h	C\$35.4–46.7k	C\$5,324	~565–777%	1.4–1.8 months

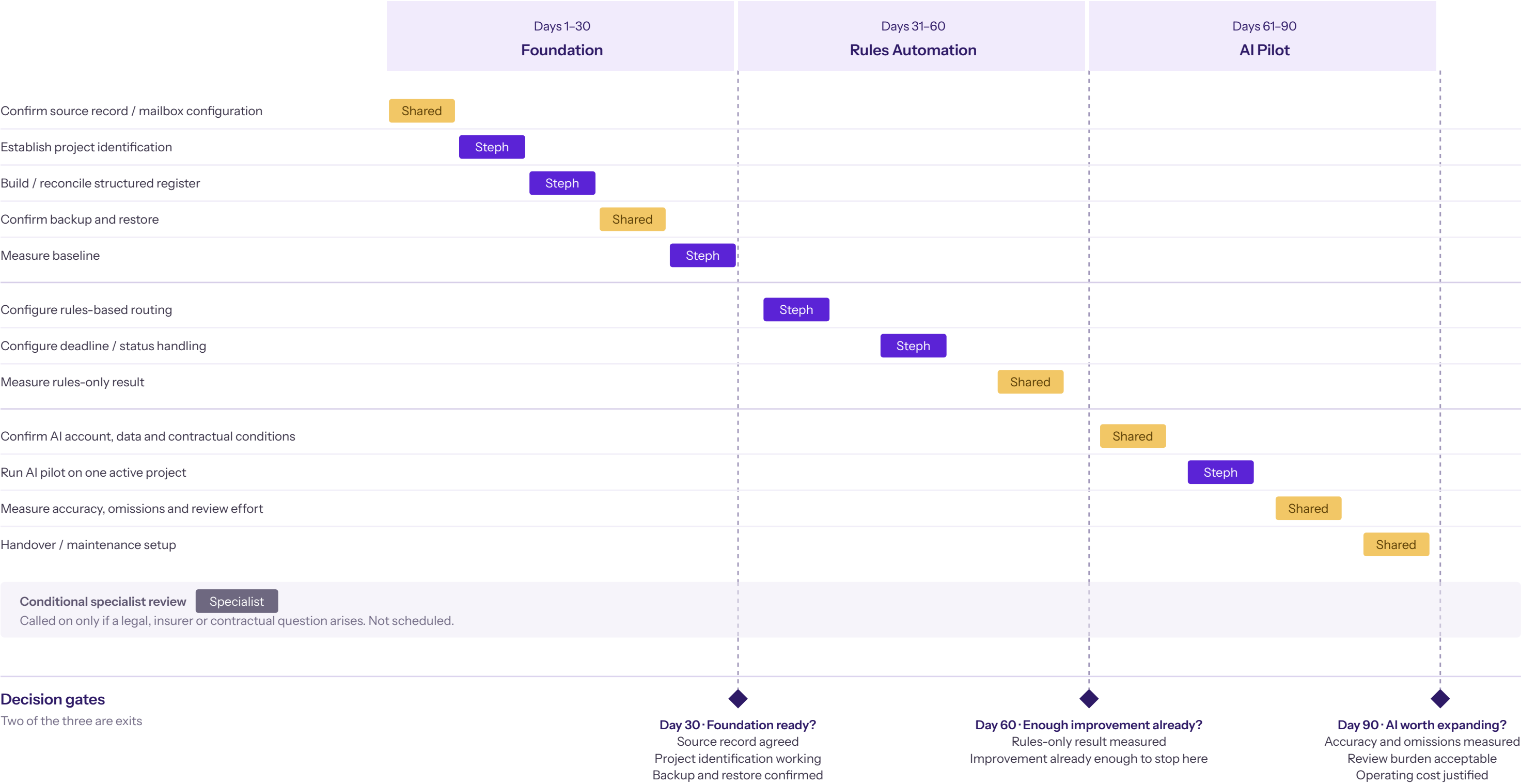
Ranges reflect the conservative and base planning assumptions shown in Appendix A. The AI-assisted increment is calculated within each planning scenario; the displayed range endpoints are not additive across rows.

These figures represent potential capacity value, not guaranteed cash savings or revenue. Detailed assumptions are in Appendix A · ROI Model & Assumptions.

90-Day Implementation Roadmap

Build the foundation, measure the rules-only result, then decide whether to proceed with an AI pilot.

Bar positions show sequence within each phase, not task duration. Responsibilities shown assume the Steph Forward build option.



Next Steps

This Map is designed to stand on its own. You can implement it yourself, use another provider, or ask Steph Forward to build it.

Option A

Do It Yourself / Another Provider

Steph fee	C\$0
Structured record setup	You / provider
Routing / rules configuration	You / provider
AI pilot setup	You / provider
Testing & handover	You / provider
Documentation / training	Depends
Post-launch support	— / depends

Best for

Comfortable configuring tools independently or already has another provider

Option B

Steph Forward Automation Build

Steph fee	From C\$5,000 following this Map
Structured record setup	Included
Routing / rules configuration	Included
AI pilot setup	Included
Testing & handover	Included
Documentation / training	Included
Post-launch support	30 days

Best for

Wants a working system built, tested and handed over

Additional workflows are scoped separately.

Appendix

Every input, assumption and check behind the figures in this report.

Appendix A · ROI Model & Assumptions

Input	Conservative	Base	Basis
Workload			
Current daily workload	170 min	170 min	Working model anchored to the owner's reported 2–3 h/day; step timings include stated and inferred estimates
Working days per year	250	250	Client estimate
Daily workload after rules automation	115 min	80 min	Planning model
Daily workload after AI pilot	85 min	58 min	Planning model
AI review & maintenance allowance	10 min/day	10 min/day	Included in — not added to — the AI-pilot workload above

Input	Conservative	Base	Basis
Rates and cost			
Owner-capacity value	C\$100/h	C\$100/h	Low end of the C\$100–200/h professional-rate range cited by the owner
Implementation	C\$5,000	C\$5,000	Illustrative Steph Forward implementation fee
Software	C\$324/yr	C\$324/yr	Illustrative AI-service allowance
Not yet quantified			
Owner setup / transition time	Not monetised	Not monetised	To be measured during implementation
Specialist advice	If triggered	If triggered	Outside the current quantified external-cost model

Note. The 170-minute baseline is a working model, not independently observed timing. The owner reported the overall workload at roughly 2–3 hours per day; some detailed step timings were inferred within that total.

Calculation bridge

Step	Conservative	Base
Rules released (current – after-rules daily workload) × working days ÷ 60	229 h/year	375 h/year
AI increment (after-rules – after-AI daily workload) × working days ÷ 60	125 h/year	92 h/year
Final released (current – after-AI daily workload) × working days ÷ 60	354 h/year	467 h/year
Annual capacity value final annual hours × owner-capacity value	C\$35.4k	C\$46.7k
Capacity ROI (annual capacity value – first-year cost) ÷ first-year cost	565%	777%
Capacity payback first-year cost ÷ (annual capacity value ÷ 12)	1.8 months	1.4 months

Appendix B · Opportunity Register

Opportunity	Dependency	Disposition	Rationale
Structured project record	—	Start first	Enables later automation
Project identification / routing	Project ID	Start early	Deterministic admin burden
Deadline / status automation	Structured record	Include	Repeatable rules
Backup / recovery	—	Include	Record continuity
AI-assisted extraction	Record + examples	Pilot later	Must prove incremental value
Cross-project retrieval / search	Enough structured data	Later	Not first priority
Routine communication automation	Proven AI / controls	Conditional	Expansion only

Appendix C · Feasibility Evidence & Tool Checks

Capability / condition	Evidence / source	Status	Constraint / implication
Mailbox completeness	Client account check	To confirm	Determines source-record design
Native routing capability	Vendor documentation + account check	To confirm	Determines rules solution
Backup / restore	Export capability + restore test	To confirm	Determines preservation / recovery approach
AI account / data terms	Vendor documentation	Confirm before pilot	Determines AI-service choice
Contractual permission for external AI processing	Client / specialist review if required	Confirm before pilot	Real project content stays outside external AI until confirmed
Attachment / language handling	Representative samples	Test if material	Determines extraction scope

A specialist review brief is delivered separately if a legal, insurer or contractual question materially affects implementation.



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