

AI readiness audit

Northline Client Services

Serve more clients with the current team.

Prepared by NocodeAssistant

29 October 2026

50 staff / 40 current clients / 6 planned client starts

Executive summary

Fix client reporting first. Northline's 5 account managers spend 268 hours a month preparing and checking reports. Their remaining 292 hours go to client calls, coordination, and follow-ups. They have no time left to take on more accounts.

The delivery team has room for more work. Reporting is the limit: Northline can deliver the service, but account managers can't support more clients under the current process.

A reporting change could release about 90 hours a month for account work. That would give the team room to serve 6 more clients, including the extra reports, client contact, and onboarding. Client count would rise from 40 to 46 without adding staff.

Recommendations

Priority	Action	Reason
1. Client reports	Connect source records to the shared report and keep account-manager approval	This releases time in the team that limits client growth
2. Incoming requests	Fix account IDs and routing rules	This removes avoidable work, but doesn't release account-manager time in the current case
3. Proposals	Approve prices, service limits, and terms in 1 file	Existing document tools are enough at 24 proposals a month

Next steps

Within 5 business days, the operations lead and analyst should spend 6 hours in total checking the report fields, source records, and account-manager workload. The sales lead should confirm which 6 prospects could start in months 5–7 and whether their service needs match the current accounts.

Use a \$10,000–\$20,000 build budget. The base plan uses \$15,000 for setup and \$300 a month for software. Build only if the workload check shows room for the extra clients and the sales plan supports the start dates.

At \$5,000 a month per added client, the base sales plan produces \$147,000 in first-year contribution before project costs. After \$18,999 in cash costs, the balance is \$128,001. If reporting improves less and only 1 client starts in month 8, the balance falls to –\$8,499. Spare time alone doesn't produce income.

Current work

Northline has 50 staff and 40 active business accounts. It provides recurring back-office services using Microsoft 365, a CRM, spreadsheets, and accounting software.

Team	Staff	Current work and capacity
Delivery	30	2,880 of 3,360 service hours used each month
Operations	8	807.2 of 896 operations hours used each month; includes the CRM analyst
Account management	5	All 560 account-work hours used each month
Sales	4	Prepares proposals and manages the prospect list
Finance and leadership	3	Approves spending, prices, and service terms

The hours above cover time available for client work after leave, meetings, training, and other duties. They are not total paid hours.

Monthly workload

Work	Volume and time	Monthly hours
Client reports	240 reports at 67 minutes each	268
Other account work	Calls, coordination, and follow-ups across 40 clients	292
Incoming requests	1,248 requests at 9 minutes each	187.2
Proposals	24 proposals at 90 minutes each	36
Core service delivery	40 clients at 72 hours each	2,880

These are separate tasks. Report time includes preparation, account-manager review, and corrections. Request handling excludes replies and service delivery. Proposal time belongs to sales, not account management.

Growth target

The sales plan is to add 6 clients with the same service needs as the current accounts. Each pays \$5,000 a month and needs 72 delivery hours a month. Starting each client also needs 12 delivery hours and 6 account-manager hours once.

The target is 6 active added clients by month 7. Check each prospect's service mix before counting it in this plan.

What to fix first

Reporting is the first choice because it releases time from the account managers who must support the new clients. Saving time elsewhere doesn't remove that limit.

Work	Change	Effect on the growth target
Client reports	Prepare fields from source records; hold conflicts for review	Releases about 90 account-work hours a month in the base case
Incoming requests	Require account IDs; apply routing rules; use AI for varied wording	Helps operations. No account-manager capacity is counted from this change
Proposals	Use 1 approved content file and a shared template	Helps sales. No extra client capacity is counted

Options

The operations lead should first remove report fields that clients don't use. The analyst should then test whether current software can fill the remaining fields. If those changes release enough account-manager time, stop there.

The \$10,000–\$20,000 build covers source connections, report preparation, conflict handling, client access rules, testing, and training. It is needed only if simpler changes can't support the growth target.

Hiring an account manager is another option. Finance should compare the actual hiring cost, start date, and added capacity with the reporting build before approving spending. No avoided salary is counted in this report.

Client reports

Each of Northline's 40 accounts receives 6 reports a month. Account managers collect CRM data, clean spreadsheet entries, prepare the shared template, check the result, and explain it to the client. This takes 67 minutes per report.

The proposed process prepares the facts from agreed source fields. Account managers still resolve conflicts, add the explanation, and approve delivery. The base target is 22 minutes per report using the new process, including review and corrections.

Work changes

Step	Current process	Proposed process
Collect facts	Copy CRM and spreadsheet values	Fill the agreed fields from source records
Check values	Find gaps while writing	Hold missing or conflicting values for the account owner
Explain progress	Write the client explanation	Explain the prepared facts and unusual cases
Approve delivery	Account manager checks the report	Keep this approval

Example report

Field	Value
Client account	NCL-014
Reporting period	October 2026
Service item	Monthly export, EX-104
Status	Awaiting client input
Open items requiring client action	1
Next action	Confirm the revised delivery date
Responsible person	Account manager
Source	EX-104, approved status entry

If the CRM says EX-104 is complete but the service log says it is awaiting client input, hold the report. Show both entries to the account owner. Resume preparation only after the owner records the correct status.

Keep client records separate. The analyst must test account access and record matching before any report is sent.

Client capacity

The base case covers 90% of reports, with staff using the new process for 85% of that work. Preparation, review, and corrections fall from 67 to 22 minutes for those reports.

$$240 \times 0.90 \times 0.85 \times (67 - 22) / 60 = 137.7 \text{ hours saved per month}$$

Count 70% of these savings as time that account managers can use for client work. Deduct 6 account-work hours a month for checks and support, even if some support later moves to operations.

$$137.7 \times 0.70 - 6 \rightarrow 90.3 \text{ hours available per month}$$

The remaining savings allow for scattered minutes and work that can't move to another client. The growth plan uses the 90.3 hours, not the full 137.7.

Account-manager time

Current account work is 14 hours per client each month: 6.7 for reporting and 7.3 for other client work. After the usable reporting savings, the workload is 11.5 hours per client, plus 6 shared support hours a month.

Account-manager work	Hours per month
Current 40 clients after the change, including support	469.6
6 added clients	69.5
Total recurring work for 46 clients	539.1
Onboarding 2 clients in the busiest start month	12
Total in that month	551.1
Available account-work time	560

The busiest start month leaves about 9 account-manager hours spare. Keep the start rate at 2 clients a month. Don't add a 7th client until the operations lead checks the actual workload.

Delivery time

The delivery team has 480 hours spare each month. 6 added clients need 432 recurring hours. In month 7, onboarding the final 2 clients adds 24 hours.

$$46 \text{ clients} \times 72 \text{ hours} + 24 \text{ onboarding hours} = 3,336 \text{ hours}$$

That fits within 3,360 delivery hours, with 24 hours spare. This is the tighter limit once reporting improves. The plan supports 6 added clients of the stated size; it doesn't support unlimited growth.

If available delivery time falls below 3,336 hours in the final start month, delay the last 2 starts. Don't fill a shortage with unpriced overtime.

Operations time

Operations uses 187.2 hours for requests and 620 for other work each month. 6 added clients increase requests by 15%, adding 28.0 hours. Reserve 4 more hours for technical support and 4 for onboarding 2 clients. The busiest month reaches 843.2 hours against 896 available.

The 6 account-work support hours remain with account managers. The 4 technical support hours belong to operations. Both are included in these capacity checks; they are separate from software charges.

First-year costs and benefits

The first-year result depends on 3 things: report savings, clients who start paying, and the cost to serve them. All figures are in USD.

Costs

Cost	Base case	Downside case
Build	\$15,000	\$20,000
Software per month in use	\$300	\$500
Months of software cost	10	10
Audit	\$999	\$999
Total cash cost	\$18,999	\$25,999
Staff setup time	40 hours	64 hours
Staff time for the audit	6 hours	6 hours
Value of audit and setup time at \$55/hour	\$2,530	\$3,850

The \$15,000 base build sits within the \$10,000–\$20,000 range. Software charges are separate from internal support time. The first 6-hour check is included in staff setup time, not added again.

Client income

Each added client pays \$5,000 a month. Extra costs to serve that client are \$1,500 a month for client-specific services, usage, and other direct costs. Existing staff pay stays the same. The balance is \$3,500 per client-month before project costs.

Each modelled client starts on the first day of its start month and pays for a full month in advance. Extra service costs are paid in that month. Move the income and cost schedule if agreed billing or start dates differ.

Finance must confirm that the \$1,500 includes every cost that grows with the account. If extra staff or overtime is needed, add it before using the result below. Contribution is the income left after these extra costs; it is not total company profit.

Sales result	Base case	Downside case
Added clients in months 1–4	0	0
Added active clients in month 5	2	0
Added active clients in month 6	4	0
Added active clients in months 7–12	6 each month	1 in months 8–12 only
Added client-months in year 1	42	5
Added income	\$210,000	\$25,000
Extra costs to serve those clients	\$63,000	\$7,500
Contribution before project costs	\$147,000	\$17,500
Contribution less cash project costs	\$128,001	–\$8,499
Balance after also charging audit and setup staff time	\$125,471	–\$12,349

The base case adds 2 clients a month in months 5, 6, and 7. Its 42 client-months are $2 + 4 + 6 \times 6$. This is the sales plan, not signed income. The sales lead must check demand and start dates before spending is approved.

Those hours are already used to serve the extra clients. Don't add an avoided hire either. Both would count the same capacity twice.

Slower improvement

Reporting input	Base case	Downside case
Reports per month at the current 40 clients	240	240
Reports the method can handle	90%	70%
Use among those reports	85%	60%
Current/new minutes per report	67 / 22	67 / 33
Share of savings usable for account work	70%	50%
Monthly account-work support	6 hours	8 hours
Monthly time available for added client work	90.3 hours	20.5 hours

The downside releases enough time to onboard and serve 1 added client. With 41 clients and 1 onboarding, account-manager work reaches 558.7 hours against 560 available. 2 added clients would exceed the limit. The 1 client starts in month 8 in the downside sales plan.

That start leaves only 1.2 account-manager hours spare. Approve it only after checking the actual month's workload. With no client start, the downside contribution after cash project costs is -\$25,999.

Spending limit

At \$3,500 contribution per client-month, the base case needs 6 paid client-months to cover \$18,999 in cash project costs. It needs 7 to cover cash costs plus \$2,530 of audit and setup staff time. The downside needs 8 paid client-months for cash costs and 9 when staff time is included.

These are whole client-months. 2 clients paying for 3 months create 6 client-months. 6 prospects create none until they start paying.

Keep the existing process if demand is absent. If demand is present but account-manager or delivery hours don't fit, reduce the start rate or compare the build with hiring. Don't approve the build on report speed alone.

Setup plan

Allow 6 to 8 weeks to build, test, and train the team. The first-year schedule sets aside months 1 and 2 for this work. Use months 3 and 4 to check the process in live use before new clients start in month 5.

Build work	Base price
Agree fields, sources, and report rules	\$3,000
Connect CRM and spreadsheet records; prepare reports	\$5,000
Add conflict handling, client access rules, and run checks	\$3,500
Test reports, train staff, and document support	\$3,500
Total	\$15,000

The base staff allowance is 40 hours: 6 for the first check, 8 to record current work and approve fields, 18 to test reports and access, and 8 for training. The downside allows 64 hours.

Assign 28 base setup hours to operations and 12 to account managers across months 1 and 2. Operations has 88.8 spare hours each month. Replace 12 hours of internal account-manager meetings and training with project work; keep all 560 client-work hours available. The 6 audit hours belong to operations, sales, and finance. Confirm this schedule before setup starts. In the downside, reserve 44 operations hours and 20 account-manager hours on the same basis.

Incoming requests

Operations staff handle 1,248 requests a month at 9 minutes each. The first change is an exact account ID and a written destination for each request type. AI can then help read varied wording.

For example, "Move the monthly export for our West account to Friday" needs both an account match and permission to change the date. The tool should identify the service and date, then hold the request until a person confirms those details.

The operations lead should write the routing rules for the 2 request sources and 1 queue. The analyst should check the IDs against all 40 accounts. Do this before commissioning a request tool.

This work belongs to operations. The report counts no account-manager hours, added clients, or income from it. Price a separate build only after showing which operation it improves and whether that operation limits growth.

Proposals

Sales prepares 24 proposals a month at 90 minutes each. Writers copy old proposals, but nobody owns the current prices, service limits, and terms.

The budget owner should name 1 approver for that content. Put the approved version in 1 file and use it in the current document tools. Keep senior review of each client promise.

A custom proposal tool would not remove the account-management limit. Don't include it in the reporting build. Check the decision again if proposal work starts delaying the 6 planned client starts.

Action plan

The operations lead owns the 6-client capacity target. The sales lead owns demand and start dates. The budget owner approves spending. Account managers keep report approval.

Task	Owner	Required result
Check the capacity limit within 5 business days	Operations lead and analyst	Use 6 combined hours. Check the 268 reporting hours, 292 other account hours, and 480 spare delivery hours. Separate tasks done by different teams.
Check the 6 planned client starts	Sales lead and finance	Confirm service size, \$5,000 fee, extra costs, likely start dates, and the sales steps still open. Remove prospects that don't fit the service or timing.
Map the report fields	Analyst and account managers	Remove unused fields. Identify the CRM or spreadsheet source for each remaining field. Define who resolves the EX-104 status conflict.
Approve the build	Budget owner	Use the \$10,000-\$20,000 range. Confirm the priced scope, software charges, staff time, capacity checks, and client-start plan before signing.
Test before live use	Analyst and account managers	Check 30 unsent reports, account access, missing values, duplicate records, and conflicting status entries. Record failures and retest fixes.
Release time in months 3 and 4	Operations lead	Check report time, staff use, corrections, and support. Recalculate how many clients fit. Don't start all 6 together.
Add 2 clients at a time from month 5	Sales and operations leads	Check both teams' hours before each start. Stop the next start if service deadlines or report quality slip.

Test plan

The 30-report trial is a first work allowance. Include different clients, report types, and dates. Check every required value against approved records. For NCL-014, a conflicting EX-104 status must hold the report until the owner resolves it.

Test wrong account IDs, missing fields, old values, duplicate records, and restricted client access separately. Record the number of each case tested and each failure. The account manager must hold a report with wrong client data. The analyst must stop the trial if records cross accounts or access rules fail. Fix the cause and rerun the affected checks.

Keep trial reports unsent. After the checks pass, account managers may use the process for live reports while keeping final approval. Time all preparation, review, corrections, and support.

Compare a full reporting cycle with the 67-minute current workload. Check the 22-minute target on reports that use the new process. Confirm how much saved time is available in account managers' schedules. Add tests if a report type or failure remains untested; 30 reports don't establish an error rate.

What to track

Measure	What to check	Who and when
Report effort	Preparation, review, corrections, and support; compare with the capacity calculation	Analyst, weekly and at month end
Account-manager time	All client work, including calls and onboarding, stays within 560 hours/month	Operations lead, before each client start
Delivery time	Recurring service and onboarding stay within 3,360 hours/month	Delivery lead, before each client start
Operations time	Requests, technical support, and onboarding stay within 896 hours/month	Operations lead, before each client start
Client starts	2 in month 5, 2 in month 6, and 2 in month 7 only if hours and quality allow	Sales lead, monthly
Service quality	Report errors, missed service dates, and client complaints don't rise as accounts are added	Account managers and delivery lead, weekly
Client contribution	Fees received less every extra cost; compare with \$3,500/client-month	Finance, monthly

Readiness checks

Ready means no blocker was found in the information reviewed. Partial means a gap needs work. Not yet means a blocker must be resolved first.

Reporting check	Status and next step
Process	Partial. Shared template exists. Finish source and conflict rules.
Manual work	Ready. Report preparation and review sit with the 5 account managers.
Current tools	Partial. Test source connections, scheduling, and access rules.
Data	Partial. Match account IDs and approve reference values before testing.
Staff	Partial. Reserve setup time and confirm that released hours stay with account managers.
Business case	Partial. Check report savings, delivery capacity, prospect start dates, and extra client costs together.

Request automation is not yet ready for spending: account IDs and routing rules need work, and its growth value has not been established. Proposal software is not a priority at the current workload. Approve proposal content in the existing tools.

Appendix: inputs and calculations

Calculations use full precision. Displayed hours are rounded down to 1 decimal place.

Record	What it contains	Used for
I01. Team and capacity	50 staff; 560 account-work hours; 3,360 delivery hours; 896 operations hours each month	Capacity checks
I02. Current workload	240 reports at 67 minutes; 292 other account hours; 72 delivery hours/client	Current client limit
I03. Report requirements	Account, period, status, totals, source, approval, and EX-104 conflict	Design and testing
I04. Growth plan	6 clients; 72 delivery hours/month and 12 once for onboarding; 6 account-manager onboarding hours	Start schedule
I05. Client economics	\$5,000 fee; \$1,500 extra monthly cost; \$3,500 contribution	Sales cases
S1. Change inputs	Coverage, staff use, task time, usable savings, support, build costs, and rollout	Base and downside cases

Capacity calculation

Monthly report savings before support:

$$G = \text{reports} \times \text{share covered} \times \text{use} \times (\text{current minutes} - \text{new minutes}) / 60$$

Monthly account-work time released:

$$R = \text{MAX}(G, 0) \times \text{usable share} + \text{MIN}(G, 0) - \text{support}$$

Hours per client after the change, excluding shared support:

$$H = 14 - [\text{MAX}(G, 0) \times \text{usable share} + \text{MIN}(G, 0)] / 40$$

Account-manager check for each month:

$$\text{active clients} \times H + \text{support} + 6 \times \text{new starts} \leq 560 \text{ hours}$$

Delivery check for each month:

$$\text{active clients} \times 72 + 12 \times \text{new starts} \leq 3,360 \text{ hours}$$

Apply the usable share only to positive savings. Count all added work if the process takes longer. The client calculation uses the same workload and report mix for each added account. Count onboarding once and monthly support in full.

Year 1 calculation

Months 1-2 are setup. Gross savings reach 50% in month 3, 75% in month 4, and 100% in months 5-12. This gives 9.25 months of full gross savings and 10 months of support and software cost.

The base case releases 831.6 account-work hours across the year at the original 40-client volume. The downside releases 184.1. These hours are a capacity check, not a second financial benefit. Apply each month's actual workload and savings before approving its client starts.

Added client-months = sum of added active paying clients in each month

Client contribution = added client-months x (\$5,000 - \$1,500)

Cash balance = client contribution - build - software - \$999 audit

Balance after staff time = cash balance - (setup hours + 6 audit hours) x \$55

Fixed staff pay is already in Northline's operating costs. Charging setup time above shows the cost of using staff on the project; it is not a second cash payment. Core service hours, account work, support, and onboarding are checked separately so a team's spare hours can't conceal another team's shortage.

Decision record

Decision	Northline's plan
Goal	Serve 46 clients with the current 50 staff, with 6 added clients active by month 7
First change	Simplify the shared report and connect the required source records
Build budget	\$10,000–\$20,000; base \$15,000, plus \$300/month software
First check	6 combined staff-hours within 5 business days, included in setup time
Capacity to prove	About 90 account-work hours released each month; no delivery overload during onboarding
Sales plan	2 client starts in each of months 5, 6, and 7; confirm demand before spending
Financial test	\$3,500 contribution per client-month; 6 paid client-months cover base cash project costs
Quality to keep	Correct client data, account-manager approval, and service deadlines
Stop the next client start	If account work exceeds 560 hours, delivery exceeds 3,360 hours, or quality falls
Work to defer	Separate request and proposal builds until their need and growth value are clear

Client case: Major.app

Major.app's published case reports a change from 40 hours to 2 hours per client per month for reporting and analysis. The platform collected data, tracked playlists and competitors, and prepared client reports.

Yoran Bosch, CEO, describes the result in the case testimonial. The team could spend more time on analysis instead of repeated data preparation.

[Read the Major.app case.](#)

NocodeAssistant | [AI readiness audit](#) | Version 2.1 | 29 October 2026