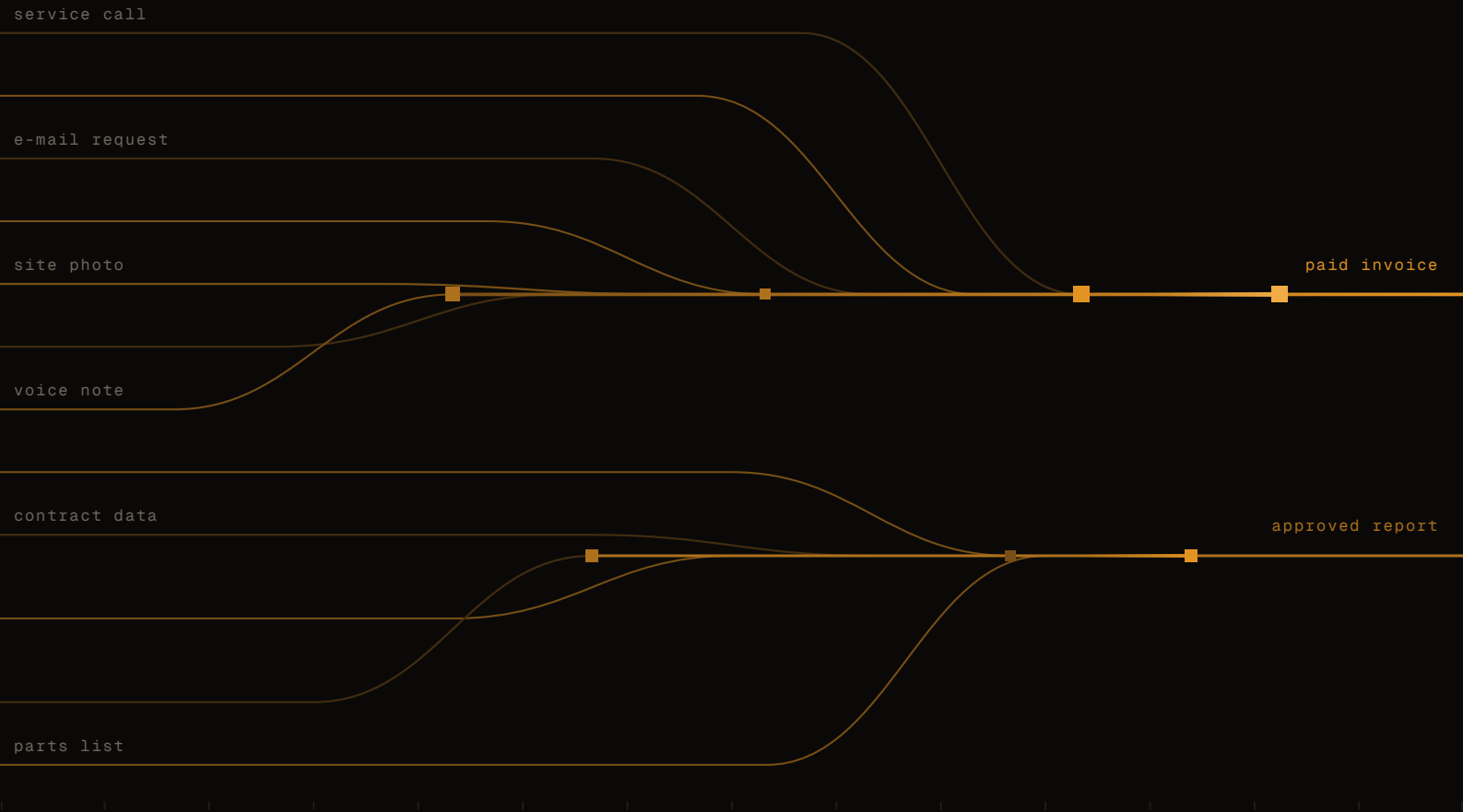




■ AI READINESS & WORKFLOW MAPPING · SAMPLE REPORT

Service operations from first call to paid invoice, **assessed for AI.**

PREPARED FOR

Rhonatal Gebäudetechnik AG

Brig-Glis, Valais · July 2026

A fictional company. Scope, method, and depth match a real engagement.

REFERENCE

LS-SAMPLE-03

FIELDWORK

July 13 – 22, 2026

ISSUED

July 28, 2026 · v1.0

STATUS

Sample report — free to share

ABOUT THIS ENGAGEMENT

Scope, method, and how to read this report.

Rhonatal Gebäudetechnik AG asked Leitspur to map service operations from the first customer call to the paid invoice, assess AI readiness, and design a target workflow that reduces technicians' evening paperwork and sends invoices nine days sooner, without changing who decides what is scheduled, approved, and billed.

Method

- Ten interviews: dispatchers, service technicians, back office, finance, the service lead, and both managing owners.
- Two ride-along days with technicians (heating and sanitary rounds) and one full day at the dispatch desk in Brig.
- Systems walkthrough: Sorba ERP, the paper service report, the dispatch board, WhatsApp photo threads, and the invoicing run.
- Quantitative baseline from the job log and invoice ledger, January–June 2026 (6,880 jobs), plus a 120-report sample audited for completeness.

Scope

In scope: request intake, dispatch, on-site reporting, invoicing. **Out of scope by agreement:** installation projects (new builds), procurement, and winter emergency staffing; these are noted where relevant but not assessed. The plan is written to stand on its own: its requirements, gates, and estimates apply whether the build is done by internal IT, an external integrator, or Leitspur.

HOW FIGURES WERE DERIVED

Volumes come from Sorba and the invoice ledger; effort figures were observed during ride-alongs and the dispatch day, then validated in interviews. Franc figures use loaded internal rates agreed with finance: CHF 78/h back office, CHF 95/h technicians (billable value CHF 140/h).

Contents

01	Executive summary	03
02	Call to cash today	04
03	Where the days go	05
04	AI readiness assessment	06
05	The target workflow	07
06	Systems & the data lifecycle	08
07	Opportunity portfolio	09
08	Roadmap and investment	10
09	Governance, risk, data protection	11
10	How to proceed	12

Company snapshot

Company	Rhonatal Gebäudetechnik AG, Brig-Glis VS — heating, ventilation, sanitary; founded 1981, owner-led
People	58 employees: 26 field technicians, 3 dispatchers, 4 back office, plus installation crews
Service book	≈ 1,650 maintenance contracts; 24/7 emergency duty in the heating season
Systems	Sorba ERP (office only), paper service reports, WhatsApp for site photos, Outlook
Volume	Ø 1,150 service jobs/month; winter peaks near 1,500

EXECUTIVE SUMMARY

The invoice for a 45-minute repair takes twelve days.

1,150 jobs/moSERVICE JOBS COMPLETED, 0
JAN-JUN 2026**12** daysMEDIAN LAG, JOB COMPLETED
→ INVOICE SENT**318** h/moTECHNICIAN TIME ON
PAPERWORK, IN THE VAN**9** %INVOICES DISPUTED OR
CREDITED, MOSTLY FOR VAGUE
DETAIL

What we found

- The service report is the chokepoint: written on paper in the van, **dropped off on Fridays**, re-typed in the office, and often sent back for missing details. One 45-minute repair generates ten days of administration.
- Back office spends **≈ 190 hours a month re-typing** what technicians already wrote, and 22% of reports come back incomplete, triggering call-backs that interrupt the next job.
- Vague descriptions have a measurable cost: **9% of invoices are disputed or credited** (≈ CHF 31,000 in credits in 2025), almost always "what exactly did you do for 3 hours?"
- Dispatch triage is skilled listening, but it consumes **60% of the dispatcher's day**, and the site history that would support it sits in Sorba, unread during calls.
- Cash arrives late because of the process itself: 12 days of lag before payment terms even start running, on ≈ CHF 780,000 invoiced monthly.

What we recommend

- Make the report **voice-first**: the technician dictates before leaving the site; AI structures work, time, and materials with catalog codes. The service lead approves every report before it goes out.
- Draft the **invoice from the approved report** automatically, with contract and warranty checks against Sorba; finance keeps the release.
- Give dispatch an AI-prepared **ticket and site brief**; scheduling and assignment stay with the dispatcher.

READINESS VERDICT

2.8 / 5. Economics and team attitude are strong; the paper-and-WhatsApp data layer is the weakest of any dimension we assessed. Phase 1 therefore concentrates on groundwork: phones, a report data model, and Sorba's service-module API.

Expected effect at full rollout

METRIC	TODAY	TARGET
Job completed → invoice sent	12 d	≈ 3 d
Back-office transcription	190 h/mo	≈ 40 h/mo
Technician paperwork	318 h/mo	≈ 130 h/mo
Disputed / credited invoices	9 %	< 4 %

Shortening the lag by ~9 days pulls roughly CHF 230,000 of receivables forward; this is a one-time but lasting effect. Back-office relief alone (≈ 150 h/mo) is worth ≈ CHF 140,000/yr at internal rates; the ≈ 190 h/mo of recovered technician time comes on top, and is worth most in winter, when freed hours are billable.

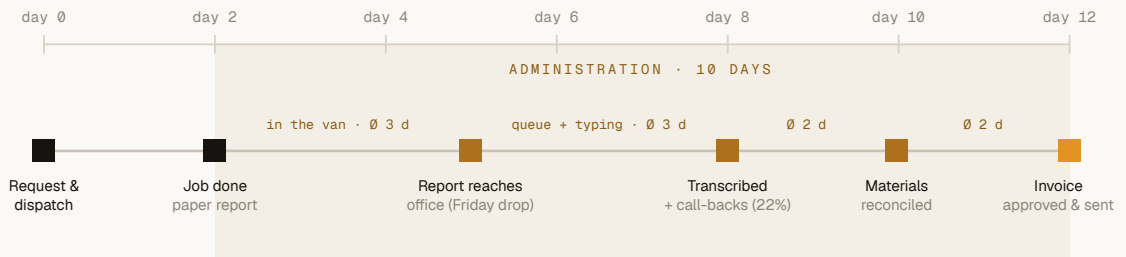
HEARD ON SITE

"The report is finished in my head when I close the van door. It just never reaches paper the same day." — service technician

CURRENT STATE

Ten of the twelve days are administration.

The timeline below follows the median service job from request to invoice, drawn from the H1 2026 job log and the 120-report audit. The shaded region is pure administration: handling that creates no customer value.



WHAT THE MAP SHOWS

Value is created by day 2. Everything after is the report making its way to an invoice: three days in the van, three in the office queue, two reconciling materials, two in approval. The payment clock — today ~41 days DSO — only starts after all of it.

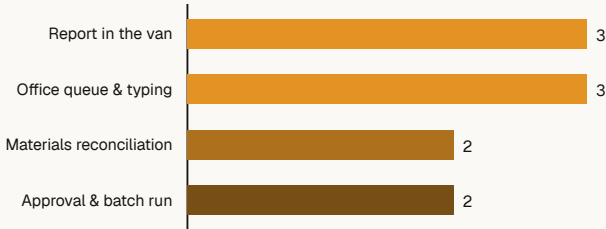
Observations that shape the design

- **The report exists twice.** First in the technician's head at the site, then on paper days later, with detail lost in between. Capturing it at the site is the central design decision.
- **The Friday drop is deliberate.** Paper reports are batched because trips across the valley cost fuel and time. A digital report removes the need to transport paper at all.
- **Dispatchers triage by ear.** Experience recognizes an emergency in the caller's voice. The design keeps that: AI prepares the ticket and history, and the dispatcher still decides every assignment.
- **Materials go unbilled.** Parts used on site but not written down surface later in the depot count. The exact amount is unknown; interviewees agree it is not zero.

QUANTIFIED BASELINE

A breakdown of the 12-day lag and the 500 monthly handling hours.

Invoice lag by stage — median days



PLUS 2 DAYS REQUEST-TO-JOB-DONE (VALUE CREATION, UNSHADED ON P. 4). MEDIAN OF H1 2026 INVOICE LEDGER, N = 6,410 INVOICES.

READING THE CHART

The two 3-day bars fall away almost entirely once the report is captured digitally at the site: nothing sits in a van or waits to be typed. Reconciliation shrinks because materials are captured with catalog codes at dictation time. Approval remains, but no longer waits for its inputs.

190 h/mo

BACK-OFFICE TRANSCRIPTION OF PAPER REPORTS

318 h/mo

TECHNICIAN PAPERWORK: 26 TECHS × ≈ 35 MIN/DAY

CHF 31k/yr

CREDITS ISSUED IN 2025, MOSTLY VAGUE OR MISSING DETAIL

41 days

DAYS SALES OUTSTANDING, OF WHICH 12 ARE INTERNAL LAG

Pain points, ranked by monthly cost

PAIN POINT	EVIDENCE	EST. COST / MONTH
Technician paperwork in the van	Ø 35 min/day per technician; evenings and Fridays worst	≈ 318 h
Report transcription & call-backs	190 h typing + 22% of reports incomplete, each a call-back	≈ 210 h
Invoice lag	12 days median; CHF ≈ 780k invoiced/mo arrives late as a result	cash effect
Disputed invoices & credits	9% disputed; CHF 31k credited in 2025; goodwill cost unmeasured	≈ CHF 2.6k
Unbilled materials	Depot count variance; magnitude not measurable from current records	not costed

Technician hours are valued at internal rate; their billable value (CHF 140/h) is higher, but we do not assume every freed hour becomes billable; in winter most are, in summer fewer. The cash effect of the lag is a one-off working-capital release of ≈ CHF 230,000 when the lag drops from 12 to ≈ 3 days.

READINESS ASSESSMENT

Overall readiness is 2.8 / 5, held back by the data layer.

Six dimensions, scored 0–5 against what the target workflow on page 7 actually requires. Scores were reviewed with the owners on July 22.

Data foundations 2.0 / 5

The core record — what happened on site — lives on paper and in WhatsApp threads. Site and contract data in Sorba is solid. The gap is bridgeable precisely because the target workflow creates the missing data as a by-product.

Systems & integration 2.5 / 5

Sorba's service module and API exist but are unused; technician phones are private, unmanaged devices. Phase 1 includes company phones with basic MDM, a prerequisite the budget on page 10 accounts for.

Process maturity 3.0 / 5

Dispatch runs a tight board; invoicing follows a fixed weekly rhythm. Report content varies by technician; the structured dictation template becomes the de-facto standard.

People & skills 3.0 / 5

Technicians are pragmatic: anything that reduces evening paperwork is welcome. The caveat from the ride-alongs is that dictation must cope with Walliserdeutsch and site noise; the Phase 1 pilot tests exactly this (Gate G-A).

Governance & risk 2.5 / 5

No AI policy yet; reports contain tenant names and access details, so FADP applies even though most data is technical. The remedies are standard: CH/EU hosting, retention rules, and a one-page field policy for what may be photographed and dictated.

Economics 4.0 / 5

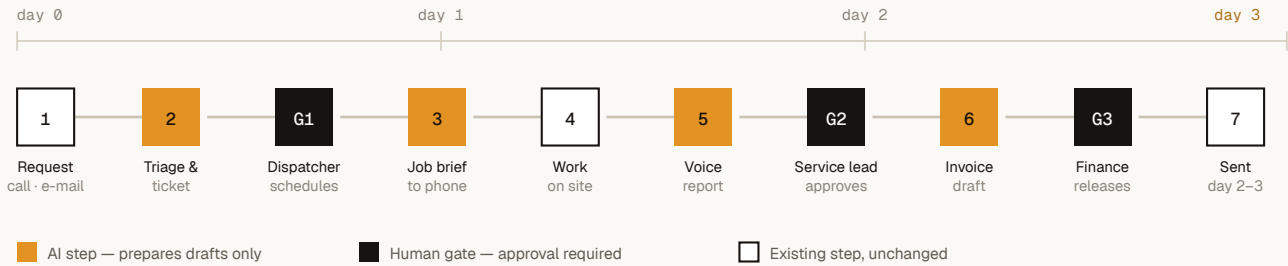
The case rests on earlier cash, fewer credits, back-office relief, and technician hours recovered in the season when they are worth CHF 140 each. It does not depend on optimistic assumptions.

WHAT MUST BE TRUE BEFORE BUILD STARTS

1. Company phones with MDM for all 26 technicians (Phase 1; ≈ CHF 18,000 hardware, budgeted separately from the build).
2. Sorba service-module API activated with vendor support; Rhonatal holds the vendor contract, whoever runs the build.
3. Dialect dictation validated with five technicians in real conditions; if accuracy disappoints, the program stops at Gate G-A with CHF 26,000 spent rather than the full program budget.

TARGET STATE

The target workflow sends the invoice by day three.



TARGET CALL-TO-CASH LINE. THREE HUMAN GATES — DISPATCHER, SERVICE LEAD, FINANCE — EXACTLY WHERE AUTHORITY SITS TODAY.

- 2

Triage & structured ticket

Calls and e-mails become tickets with urgency suggestion, trade, site history, and contract status pulled from Sorba while the phone is still ringing. The dispatcher hears the caller and, for the first time, also sees the history.
- 3

Job brief to the phone

Before departure: site access notes, installed equipment, last three visits, open warranty items, likely parts. This context exists in Sorba today; it is rarely read before a job.
- 5

Voice report at the site

The technician dictates before closing the van door; AI structures work performed, time, and materials with catalog codes, attaches photos, and flags gaps immediately, while the technician is still on site rather than four days later from the office.

- G2

Service lead approves the report

One screen, dictation audio available, edits tracked. The 22% incompleteness rate becomes a same-day fix instead of a next-week call-back.
- 6

Invoice draft with checks

Generated from the approved report: contract coverage, warranty status, price list, and flat-rate rules checked against Sorba. Line descriptions are written for the customer who reads them, which addresses the main cause of disputes.
- G3

Finance releases

Finance keeps the same authority, with more complete inputs. The weekly batch becomes a daily release of whatever is ready.

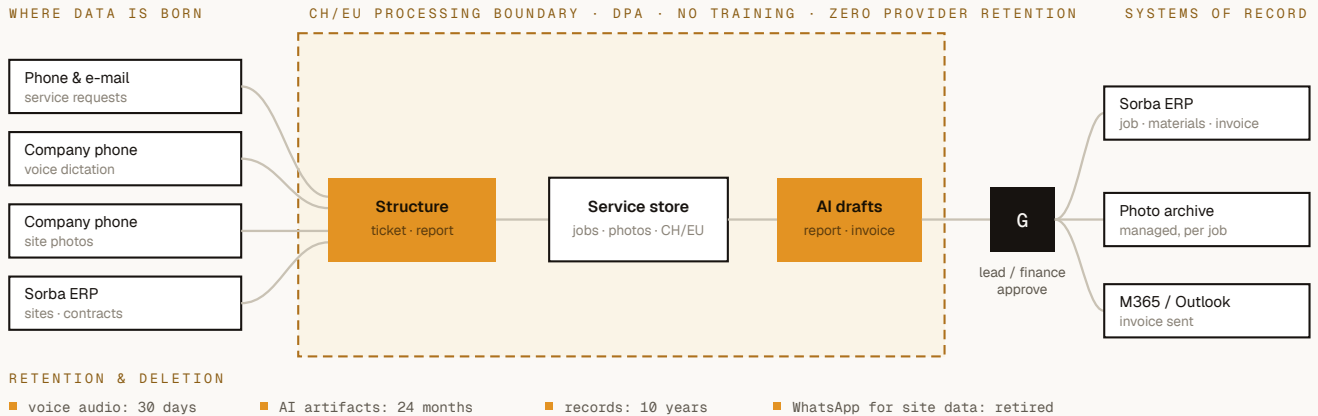
DESIGN PRINCIPLE

Dispatch stays human because triage requires judgment under uncertainty; the AI only prepares the brief. The report is captured digitally because detail is lost between site and office. Nothing else about the technician's work changes.

SYSTEMS & THE DATA LIFECYCLE

A managed path for reports and site photos.

Rhonatal's weakest link is unmanaged tooling: paper pads and private WhatsApp. The target workflow replaces both with a path the company controls, built around Sorba and the new company phones. Every job's data follows a defined lifecycle from the first call to the archived invoice.



DATA LIFECYCLE IN THE TARGET WORKFLOW. SORBA STAYS THE SYSTEM OF RECORD; THE SERVICE STORE HOLDS STRUCTURED REPORTS AND PHOTOS, LINKED TO JOBS.

Your systems today — and their role in the target workflow

SYSTEM	TODAY	IN THE TARGET WORKFLOW
E-mail & phone — M365, fixed line	Requests typed into tickets by hand	Connector drafts structured tickets; the dispatcher decides every assignment
ERP — Sorba	Office-only; service module unused	Service-module API activated (Phase 1); stays the system of record for jobs and invoices
Reports — paper pads	In the van until Friday	Retired: replaced by a voice-first app on the company phone; the report is created at the site
Photos — WhatsApp, private phones	Scattered across private accounts, hard to retrieve	Replaced: in-app camera to a managed archive, linked to the job
Phones — private devices	No management, mixed private/work use	26 company phones with MDM (Phase 1); every mobile step depends on them
Backup — IT partner	Office servers only	Service store and photo archive join the backup plan

Lifecycle rules

- **Capture:** reports and photos recorded in structured form at the site, linked to job, site, and technician.
- **Processing:** CH/EU inference under DPA; dictation audio deleted after structuring (30-day default); no training on your data.
- **Access:** technicians see their own jobs; dispatch and service lead see all; finance sees invoicing, mirroring how authority works today.
- **Field policy:** one page covering what to photograph, what to dictate, and what never to record.
- **Retention & deletion:** business records 10 years; photos per contract terms; deleting a job cascades to its photos and drafts.

EXPLICITLY EXCLUDED

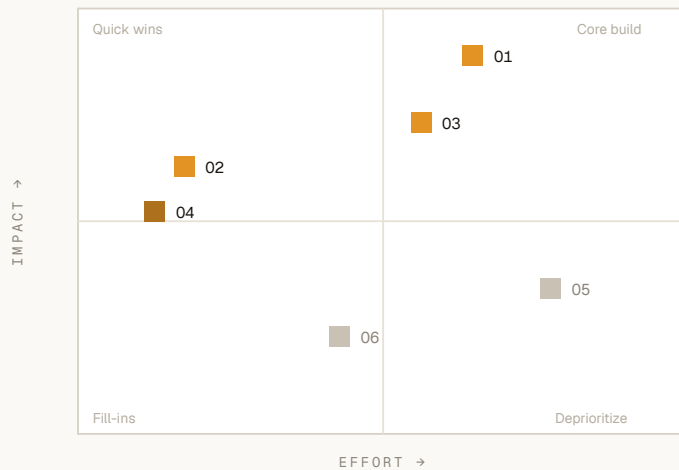
Training on your data · site data in WhatsApp (retired) · storage on private phones · recording anything except the technician's own dictation (never conversations or third parties).

EFFECT ON DATA-PROTECTION RISK

Today, photos of customers' boiler rooms and apartments sit in private WhatsApp accounts. The target workflow puts this data under company control for the first time. On this point the new setup improves data protection compared with today.

OPPORTUNITY PORTFOLIO

Four of six opportunities are recommended now.



PORTFOLIO LOGIC

O1 (voice report) is the precondition for the rest: O3's invoice drafts are only as good as the reports feeding them. O2 and O4 are cheap because they mostly read Sorba data that already exists. Everything ships to five pilot technicians before any fleet decision.

Deprioritized

O5 — maintenance route optimization and O6 — spare-part photo ID are useful but secondary. Both depend on a year of clean structured data that O1 will produce as a by-product. We recommend revisiting them in summer 2027.

IMPACT = CASH + HOURS + DISPUTE REDUCTION · EFFORT = BUILD + CHANGE COST. POSITIONS REVIEWED WITH THE OWNERS.

#	OPPORTUNITY	WHAT IT REPLACES	EFFECT / MO	EFFORT	PHASE
01	Voice-first service report	Paper in the van, Friday drops, 190 h of office typing	≈ 340 h	Medium	1–2
02	Intake triage & ticketing	Hand-built tickets; history unread during calls	≈ 45 h	Low	2
03	Invoice draft + contract check	Manual assembly, weekly batch, vague line items	≈ 9 d lag cut	Medium	2
04	Job brief pack	Departing without site context; calls back to the office	≈ 30 h	Low	2
05	Maintenance route optimization	Manual seasonal planning board	n/a	High	Later
06	Spare-part photo identification	Depot phone calls and guesswork	n/a	Medium	Later

O1's ≈ 340 h/mo combines back-office relief (≈ 150 h) and recovered technician time (≈ 190 h), which carry different hourly values and are kept separate in the business case on p. 10. Lag reduction is counted once, as cash, not again as hours.

ROADMAP & INVESTMENT

Eighteen weeks, complete before the heating season.



Phase 1 — Phones, Sorba API, dialect pilot

WEEKS 1-5

Company phones with MDM issued; Sorba service-module API activated; report data model agreed with the service lead; dictation tested with five technicians in real conditions: Walliserdeutsch, machine rooms, gloves.

Gate G-A: ≥ 90% usable dictation structure on 50 real reports; API round-trip working. If dialect accuracy fails, the program stops here with CHF 26,000 spent; the phones remain in use regardless.

Phase 2 — Voice report & invoice line

WEEKS 5-13

O1 in daily use for the five pilot technicians; O3 invoice drafts flowing to finance; O2 tickets and O4 briefs live at the dispatch desk. Old paper path runs in parallel until Gate G-B.

Gate G-B: pilot jobs invoiced in ≤ 4 days median over four weeks; service-lead edit rate < 20%; pilot technicians vote to keep it.

Phase 3 — Fleet rollout & handover

WEEKS 13-18

All 26 technicians onboarded in cohorts of five; paper report retired van by van; runbook and admin handover to the internal owner; external support reduced to on-call through the first heating season.

Gate G-C: fleet median lag ≤ 4 days; Rhonatal operates two weeks without external help before winter duty starts.

Indicative budget

ITEM	CHF
Phase 1 — estimate	26,000
excl. phone hardware ≈ CHF 18,000, procured by Rhonatal	
Phase 2 — estimate range	58,000–72,000
range narrows after Gate G-A results	
Phase 3 — estimate range	24,000–32,000
incl. first-season standby	
Running costs / month	1,000–1,500
CH/EU-hosted models, licenses, monitoring	

Estimates at typical Swiss market rates for a build of this kind, whoever executes it — an external integrator or internal IT with targeted support. The ranges are driven mainly by Sorba API depth and by how much testing and onboarding is done in-house.

PAYBACK (CONSERVATIVE CASE)

Back-office relief and dispute reduction alone: ≈ 150 h/mo × CHF 78 + CHF 19k/yr credits avoided ≈ **CHF 159,000/yr** against a build of CHF 108,000–130,000 → **payback in 9–10 months**. The CHF ≈ 230,000 working-capital release and the recovered technician hours are additional and not counted here.

KPIs tracked from week 1

- Median job-to-invoice lag (days); DSO
- Report completeness at first submission; call-back count
- Service-lead edit rate; dispute/credit rate
- Technician paperwork minutes/day (pilot self-report)

Field data includes personal data, so the FADP applies.

Data protection & confidentiality

- **Hosting:** dictation and drafting on CH/EU-hosted models under a data processing agreement; no customer data used for provider training; audio deleted after structuring (configurable retention, default 30 days).
- **What's in a report:** tenant names, phone numbers, access arrangements, sometimes photos of private interiors — FADP applies. The field policy is one page: what to photograph, what to dictate, what never to record.
- **Property managers:** your three largest clients are professional Verwaltungen with their own data expectations; notify them of the process change proactively; faster, clearer invoices make this an easy conversation.
- **Access:** technicians see their own jobs; dispatch and service lead see all; finance sees the same scope as today. Sorba remains the system of record.

Human oversight policy

- Every invoice requires finance release, and every report requires service-lead approval. Dictation is a draft the technician confirms on screen before submitting.
- Urgency suggestions never dispatch anyone; the dispatcher assigns every job. An incorrect suggestion is corrected at the desk before anyone drives out.
- Paper remains the documented fallback; a dead battery or a dead zone in a mountain valley must never block a repair.

Key risks and how the plan mitigates them

RISK	MITIGATION
Dialect or noise breaks dictation	Tested with five real technicians in Phase 1 under a hard gate; guided-form fallback on the same phone if free dictation underperforms.
Wrong materials or time on an invoice	Catalog-code matching with flagged uncertainty; service-lead approval; finance release; dispute rate tracked weekly as the primary control metric.
Technicians reject the phone workflow	Pilot cohort chosen with the service lead, includes one loud skeptic; the Gate G-B vote is binding; the drop in paperwork minutes is the strongest argument.
Sorba integration friction	Vendor engaged from week 1 under Rhonatal's support contract; fallback is CSV exchange at a defined cadence, slower but workable.
Winter emergency load	Rollout completes before the season; emergency jobs keep a shortcut path (dictate later, invoice flagged); standby support through the first winter.

REGULATORY NOTE

No automated decisions with legal effect for individuals; FADP duties are met through the DPA, the retention rules, and the field policy. Tenant data in reports is processed on the existing legal basis of the service contract with the property owner; a short contract annex should make this explicit for your Verwaltung clients.

HOW TO PROCEED

A September start puts three-day invoicing in reach by December.

Recommended sequence

WHEN	WHAT
Week of Aug 3	Walkthrough of this report with the owners and service lead; separate 30-min session with the pilot technicians. Decision on Phase 1.
Week of Aug 17	Implementation partner selected or internal owners assigned; phone order placed (4–6 week lead time; this is the critical path); Sorba vendor engaged for API activation.
Sep 14	Phase 1 kickoff in Brig. Dialect pilot runs during normal maintenance rounds, in real machine rooms rather than staged demos.
Mid-Oct	Gate G-A review: continue, adjust, or stop. In every case Rhonatal keeps the phones, an activated API, and a clear answer on dictation.

Roles the plan requires

- Product owner at ~20% (proposed: the service lead)
- Phone procurement and the Sorba support contract
- Five pilot technicians, chosen with the service lead
- Finance time for weekly 30-min pilot reviews

No-regret first steps

- Record two timestamps on every job from now on — job done, invoice sent; every gate measures against this baseline
- Stop new site photos in WhatsApp; collect them in per-job folders until the managed archive exists
- Draft the one-page field policy on what may be photographed and dictated; it is needed whoever builds

What to require from any implementation partner

- CH/EU hosting under a data processing agreement, no training on Rhonatal's data, 30-day audio retention — the terms set out in this report
- Integration references for Sorba or comparable Swiss trade ERPs, not generic AI projects
- Gates G-A to G-C written into the engagement, with the right to stop at each
- KPIs measured from week 1 and reported openly, including edit and dispute rates
- Training during real jobs, with ride-alongs in pilot weeks, not classroom sessions
- Full handover with runbook and admin access; data, prompts, and configuration exportable and owned by Rhonatal

VALIDITY OF THIS ASSESSMENT

Figures and estimates hold until October 31, 2026; after that, re-check them before deciding. The schedule has one hard external dependency — phone delivery — and one hard deadline: heating season. An August decision meets both comfortably; an October decision pushes fleet rollout into spring.

THE CORE FIGURE

Between "job done" and "invoice sent" lie **twelve days and roughly 500 hours a month** of pure handling. The voice report removes most of both, including most of the technicians' after-hours paperwork.



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REFERENCE

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