TRANSFORMING YOUR BUSINESS

Three Case Studies

What can be achieved in 16 weeks.

93	28+	70+
AI opportunities identified	structured interviews	pipeline stages mapped

About This Document

This document presents real analytical work produced within 16 weeks. Three businesses participated as employer partners. All three have been anonymised. The work has not.

L&D Managers, HR Directors & Senior Leaders

Evaluating whether the apprenticeship levy can be directed toward an investment with genuinely transformational returns.

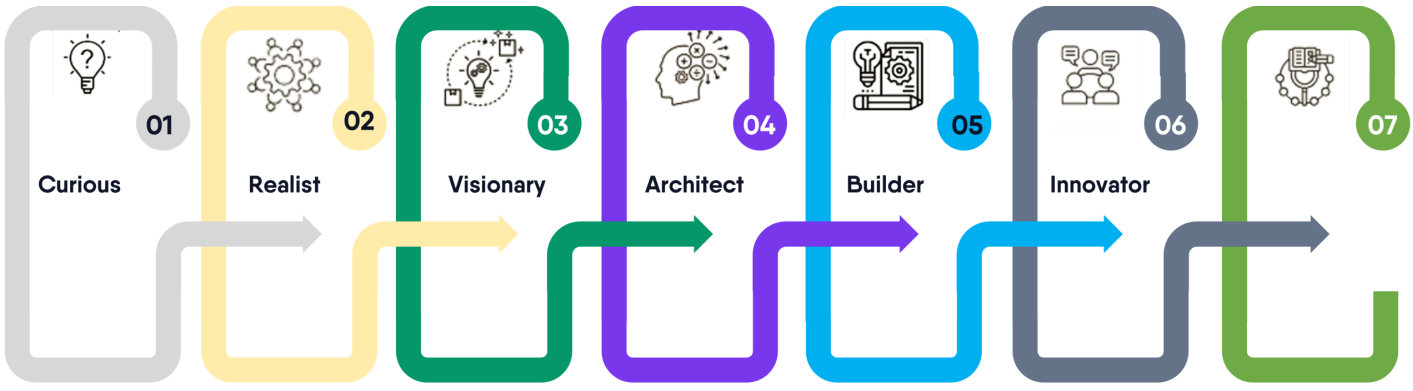
Business Owners & Line Managers

Considering what an AI-capable Business Analyst could produce in their organisation, and what it would cost compared to commissioning it externally.

THE FRAMEWORK

The Seven Stages of AI Readiness

Most business professionals — including many senior ones — sit at Stage 1 or Stage 2. They have experimented with AI tools, can prompt a chatbot, and notice when outputs are obviously wrong. What they cannot yet do is translate that awareness into a specific, financially grounded, operationally rigorous plan for what their organisation should build — and in what order.



Stage 01	Stage 02	Stage 03	Stage 04	Stage 05	Stage 06	Stage 07
Explores Basic Prompts	Daily Prompter	Has 2+ Applications in Mind	Has a 3 Year Apps Deployment Roadmap	AI Implementation Expert	AI Optimisation Expert	Deploying Self-Learning Apps
AI Curious	Recognises Potential	Thinks about Business Use Cases	Designs Implementation Strategy	Monitors AI Performance	Fine-tunes Performance to Maximise ROI	AI Innovation Leader
Cutting & Pasting Prompts	Uses AI Assisted Tools					Creates Learning Systems
Unaware of AI Ethics	**Notices Output Biases**	**Aware of Hallucinations**	**Conducts Bias Audits**	**Ensures Compliance Standards**	**Embeds Ethics in Roadmap**	**Ethical by Design**

The 7 Stages of AI Readiness

Stage 1–2

Where organisations start: Curious & Realist. Basic prompting, informal tool use, general awareness of AI potential without structured application capability.

Stage 4–5

Where they arrive by month four: Architect & Builder. Three-year deployment roadmap, implementation strategy, bias audits, AI applications built and deployed.

All three organisations in these case studies entered at Stage 1–2. The methodology described in the next section is what drives that progression — and the case studies are the evidence that it is real.

ABOUT THE PROGRAMME

What distinguishes this programme from standard consultancy and training is the integration of AI application development throughout — from prompt templates deployable in a day to multi-agent agentic systems. Organisations learn to analyse business processes, identify AI opportunities across a five-category complexity framework, evaluate each on a full ROI basis, and build the solutions themselves.

The programme is developed and taught by **Dhiren Master**, former partner at Monitor Company (global strategy consultancy), with over three decades of strategy consulting and senior executive experience across 26 countries. Full-stack developer, data scientist, Machine Learning specialist, and Agentic AI application developer.

Team Enrolment — Why 2 or More Employees Is the Right Investment

The more employees participating, the greater the depth of AI knowledge embedded across the organisation, and the faster the implementation momentum. The right number is **2+ dependent on the size and complexity of your organisation.**

One of our current employer partners is a **domiciliary care provider with 200 carers** and a management team of 10. They are enrolling **6–8 of their head office and management staff** simultaneously — building a cohort of AI-capable business analysts who will collectively map the organisation's operations, identify its AI opportunities, and build the tools to address them, each from their own functional vantage point. That is not a training exercise. That is an organisational transformation programme — at an apprenticeship cost.

PART ONE

The Approach: How We Move People from Stage 1–2 to Stage 4–5

The four analytical disciplines below are the practical tools through which AI maturity progression happens. Each builds on the previous. Together, they are why an apprentice at Stage 1–2 on day one is operating at Stage 4–5 by month eleven.

01 Structured Elicitation

One-to-one structured interviews with every person who runs the business. Not surveys — conversations that surface what people actually do, not what the procedure says. The most important distinction in business analysis is between the intended process and the actual one: the spreadsheet that sits alongside the official system because the official system cannot do what is needed; the single person whose personal skill is carrying a critical function that should long since have been systematised. Twenty-eight-plus structured interviews were conducted across the three businesses.

02 Process Pipeline Mapping

Elicitation reveals the ingredients. Pipeline mapping assembles them into a coherent picture of the operation end to end — every stage documented with roles involved, typical inputs and outputs, tools used, most common failure modes, and a risk rating for the probability and cost of failure. Once a process is mapped, the stages that are candidates for AI intervention become visible wherever they occur.

03 AI Opportunity Classification

Not all AI opportunities are equivalent in complexity, cost, or risk. The skill of the BA is knowing which category each opportunity belongs in — and why. Over-engineering a Category 1 problem wastes months of development resource. Under-resourcing a Category 4 problem produces a half-built system that creates more work than it saves.

Category	Description	Typical Build Time
1	Off-the-shelf tool configuration	1 day
2	Standalone Prompt Engineering	1–2 days
3	Prompt + Integration with Existing MIS Software	3–4 days
4	Multiple Agentic Agents Working Together	10+ days
5	Full build standalone agentic application	3–6 months

04 The ROI Framework

Every AI opportunity is a commercial decision. The framework provides a consistent, auditable method: development cost (external contractor days at £700/day + internal training + software), annual saving (time recovered × £200/day staff rate + revenue improvement), ROI percentage, payback period in months, and a build-vs-buy threshold — the maximum monthly SaaS cost at which buying a third-party platform is more financially attractive than building custom. This transforms a list of ideas into a prioritised, phased implementation plan with a defensible financial case for each item.

PART TWO — THE CASE STUDIES

CASE STUDY A

The Multi-Site Dental Group

5+	3+	12	45+	34
dentists	hygienists	interviews	pipeline stages	AI Buddies

The Core Finding

This practice was not losing revenue it had already generated. It was failing to generate revenue it had already earned the right to — and losing it at multiple points across the entire patient journey. The elicitation and pipeline mapping revealed not one revenue problem but a chain of interlocking failures, each invisible on its own, collectively significant.

🔒 **Lost at the front door:** More than 50% of new patient enquiries arrived after hours and were never seen. The automated messaging platform marked threads as answered after sending an acknowledgement — the patient received a reply, but nobody ever read the original message. The patient called a competitor by the following morning.

🧠 **Conversion knowledge trapped in one person:** One front desk lead converted at 90%+. Everyone else converted at a fraction of that rate. There was no script, no framework, no attempt to systematise what the practice's best performer already did. The knowledge lived in one person's instinct, inaccessible to the rest of the team.

📋 **Clinical documentation gaps:** Notes were written from memory, often at the end of a session or the following day, at 75–80% accuracy. Treatment that is not identified cannot be proposed, presented, or accepted. The practice owner identified inconsistent examination quality as *"the biggest revenue loss opportunity in the business."*

💬 **The handoff failure:** The treatment co-ordinator received *"they need a crown"* as her complete briefing before a £2,000+ conversation. Full clinical context, patient history, emotional signals, and hesitations observed during the appointment — none of it transferred.

📄 **Outstanding treatment plans, invisible revenue:** Hundreds of thousands of dollars in outstanding treatment plans sat in an overloaded task list that nobody had consistent time to work through. A treatment plan never followed up is a treatment never completed. It does not show up as a patient cancellation — it simply never becomes a raised invoice.

🔍 **Quality and compliance unmonitored:** With no systematic call monitoring, no standardised examination protocol, and no AI-assisted coaching framework, quality and compliance sat entirely on individual habits and supervisor observation. Evidence-based coaching was not possible at scale.

Selected AI Buddies — Top Priority

Category 4 **Out-of-Hours Lead Engagement** — multi-channel AI agent engaging prospective patients immediately outside business hours, capturing details and booking callbacks. Target: 80%+ lead recovery from 0% current.

Category 3 **Treatment Plan Follow-Up** — prioritised daily outreach list ranked by financial value and clinical urgency, with personalised call scripts drawn from live patient records via Eaglesoft.

Category 5 **Clinical Consultation Transcription** — replaces one hour/day of memory-based note-writing (75–80% accuracy) with near-100% HIPAA-compliant transcript capture written directly into the practice management system.

Category 3 **Treatment Co-ordinator Pre-Appointment Brief** — replaces "they need a crown" with full clinical context, patient history, observed hesitations, and suggested conversational approaches before every presentation.

Category 4 **Examination Quality Buddy** — real-time clinical prompts for the doctor, monitoring examination data against the validated protocol to flag gaps and build a quality baseline for coaching associate doctors.

Category 3 **Compliance Audit** — replaces 30–60 minutes of daily manual schedule checking with an automated overnight run. Saves 2.5–5 hours per week.

Plus 28 further AI Buddies, including 14 deployable immediately via prompt templates. Full catalogue available on request.

THE KEY INSIGHT

The revenue story in this business was not one problem — it was five problems operating simultaneously, each invisible in its own way. Leads never answered do not appear in any report. Treatments never identified do not show up as declined proposals. Treatment plans never followed up do not appear as missed invoices. Quality risks with no monitoring system produce no alert until something goes wrong. A Business Analyst who maps the patient journey end to end makes the invisible visible — at every stage, not just the most obvious one.

CASE STUDY B

The Premium Cabinetry Studio

6	6	22	33	3
person team	interviews	pipeline stages	AI Buddies	client segments

The Core Finding

A team with every ingredient for exceptional success — and a set of operational and strategic conditions preventing those ingredients from combining effectively. The owner's own diagnostic was precise: *"I have to ask designers what they are working on right now. I shouldn't have to ask."*

The market had shifted materially: a significant post-pandemic influx of high-net-worth residents created a growing pool of premium clients. The business had the skills to serve them but not the systems.

Three Client Segments Identified

SEGMENT 1

~£50k

The Reliable Remodel

Consistent income but highly competitive, margin-constrained, and facing economic headwinds as this group defers discretionary spending.

SEGMENT 2

~£100k

The Aspiring Middle

~50% of the market by volume. Psychologically complex: clients who conceal their real budget ceiling and require skilled commercial handling to unlock it.

SEGMENT 3

£300k+

The Premium Client

Not economically constrained. Deeply loyal once trust is established. A single relationship — with its repeat projects and peer referrals — can sustain a significant portion of a business's revenue independently.

Strategic recommendation: build the operational infrastructure to serve Segment 2 reliably, then use that as the foundation for a deliberate transition toward Segment 3 over three to five years.

The 22-Stage Pipeline — High-Risk Stages at Every Transition

Phase 1 — Lead to Qualification

Enquiries tracked in email threads or individual memories. Qualification conducted differently by each team member. Designers following leads into full design investment on projects that would not convert.

Phase 2 — Design Development

Site measurement is the highest-risk activity — errors create expensive rework downstream. Budget conversation happened at the end of the design process. The £40k-expectation-meets-£109k-proposal scenario occurred repeatedly.

Phase 3 — Ordering & Approval

The highest-risk single stage. Ordering errors — wrong dimensions, wrong finishes, missing items, supplier nomenclature mismatches — creating costly rework and damaged supplier relationships.

Phase 4 — Logistics & Pre-Installation

Lead-time tracking manual. Pre-installation site checks not consistently performed. *"Every floor is out of level. Knowing this before installation day is the difference between a clean project and a costly delay."*

Phase 5 — Installation & Completion

When preparation was thorough, the team delivered exceptional work. When it was not, consequences cascaded: return visits, remediation costs, delayed sign-offs, disputed final invoices.

Phase 6 — Aftercare

Two team members maintained exceptional client relationships by personal habit, not business process. The commercial value of a systematised aftercare programme for Segment 3 clients was not being captured.

33 AI Buddies identified across three implementation tiers (0–60 days, 60–120 days, 120+ days). The single Category 5 build — the Order Review and Validation Buddy — runs three parallel validation checks on every submitted order, flagging every discrepancy for designer sign-off before submission.

THE KEY INSIGHT

The AI Buddies are not replacements for human expertise — they are the scaffolding that makes expertise transferable, consistent, and scalable. The BA's distinctive contribution was not identifying what the technology could do. It was standing outside the process, mapping it end to end, and surfacing exactly where the operational friction was concentrated and what kind of intervention would address it at the right level.

CASE STUDY C

The Regional Insurance Brokerage

55	15+	10+	6	26
staff	call advisors	interviews	functions mapped	AI solutions

Five Interlocking Structural Problems

1 **A single seasonal revenue window.** The heritage insurance line created a concentrated revenue opportunity each spring. Missing it — through slow lead response or conversion inefficiency — meant a disproportionate impact on the full year. No AI-assisted lead engagement; everything depended on adviser availability during business hours.

2 **Manual processes throughout every function.** Excel-based tracking, double data entry across 14+ insurer portals, paper-based forms, and manual weekly reporting — all inside the same organisation. Every one of these was a rule-based task. None required a human. All were consuming one.

3 **Critical knowledge with no backup.** One senior staff member carried deep product knowledge across multiple lines that existed nowhere else in the business. His departure — already planned — created a knowledge gap that hiring alone could not fill.

4 **Call quality monitored in 3–4% of conversations.** The primary revenue engine was phone-based advisory selling. Current QA covered only a fraction of calls — far below the threshold at which meaningful coaching or FCA compliance monitoring was possible.

5 **Cross-sell opportunities missed on almost every call.** The data to identify cross-sell potential existed in the CRM. It was not being surfaced in real time. The revenue that existing relationships had already earned the right to generate was being left on the table.

26 AI Solutions Across Six Functions

Unlike the dental practice or cabinetry studio, the brokerage's AI opportunity sat across six parallel operational functions. Ten of the 26 solutions fell in Categories 1–2 — achievable without an external developer and without touching the CRM. Of the eight Category 4 solutions, the most commercially significant were: **100% call monitoring** (from 3–4% current); a **WhatsApp marketing chatbot** for the Heritage season; a **real-time cross-sell identification system**; and the **Underwriter Knowledge Base** — capturing a departing specialist's expertise before the window closed permanently.

One Category 4 solution was deferred — not because it cannot be built, but because the operational environment makes it fragile. **Knowing when not to build is as important as knowing how.**

THE KEY INSIGHT

AI opportunity is not concentrated in one part of a business. It is distributed across every function that contains rule-based work, manual reporting, inconsistent knowledge access, or unmonitored performance. A Business Analyst who cannot distinguish between a Category 1 problem and a Category 4 problem wastes the organisation's time and money on both. Getting that distinction right — and building the case for each at the appropriate level of investment and urgency — is the skill this programme develops.

Portfolio Statistics — Three Businesses at Month Four

	Dental Group	Cabinetry Studio	Insurance Brokerage	Total
Stakeholder interviews	12	6	10+	28+
Pipeline stages mapped	45+	22	Multiple	70+
Category 1 — Off-the-shelf configuration	0	2	5	7
Category 2 — Standalone Prompt Engineering	4	5	5	14
Category 3 — Prompt + MIS Integration	24	18	7	49
Category 4 — Multiple Agentic Agents	4	7	8	19
Category 5 — Full build standalone app	2	1	1	4
Total AI opportunities	**34**	**33**	**26**	**93**

PART THREE — SYNTHESIS

Five Problems Every Organisation Has

Three businesses. Three different sectors, sizes, customer profiles, regulatory environments, and commercial models. And the same five problems — in different forms — in every one.

01 Lost Leads at the First Touchpoint

Revenue the business had already invested in generating — through marketing and reputation — was leaking away at the very first stage of the pipeline. The cost of recovering a lead that has already shown intent is low. The cost of regenerating intent from a cold prospect is high. Every business in this portfolio was paying the second cost because they were failing to manage the first.

02 Knowledge in One Person's Head

In all three businesses, performance on critical tasks was a function of who happened to be available — not of what the business had systematised. The dental conversion rate depended on one front desk lead. The cabinetry studio's commercial instinct was the property of two senior people. The brokerage faced the imminent departure of a product expert whose knowledge would leave with him.

03 Manual Data Entry at Every Decision Point

The dental group's insurance breakdown form had 40–50 data points to transcribe manually. Clinical notes were written from memory at 75–80% accuracy. The cabinetry studio's weekly review consumed 4.5 hours of management time that the pipeline system should have reported automatically. The brokerage's double-entry problem spanned 14 insurer portals. Significant professional time was being consumed by rule-based work that no professional should be doing in 2026.

04 The Handoff Problem

Value is lost at every transition between people, roles, and systems. The dental treatment co-ordinator received "they need a crown" as her complete briefing before a £2,000+ conversation. The cabinetry studio's designers had no standard way to brief the installation team. The brokerage's Heritage lead handoff lived in a shared spreadsheet and a checkbox. In each case, the person receiving the handoff was working with insufficient context and bearing the cost of failures the person who passed the work would never see.

05

Invisible Revenue

Revenue not generated is invisible in a way that revenue lost is not. A patient enquiry never answered does not appear in any report. A treatment never identified does not show up as a declined proposal. A cross-sell opportunity never raised does not appear as a missed sale. In all three businesses, the amount of revenue never generated substantially exceeded the amount of revenue lost after initial generation.

A Business Analyst who maps the pipeline end to end makes the invisible visible.

Skills Developed Across the Three Case Studies

The following table shows how the analytical work produced across all three businesses maps to the Knowledge, Skills, and Behaviours required for Business Process Transformation. They are the direct outputs of the methodology applied in each engagement.

Skill Area	Evidence in Each Case Study
Business analysis planning and monitoring	Structured elicitation plans, interview frameworks, pipeline mapping methodology
Stakeholder analysis and management	6+ interviews across diverse roles; stakeholder influence and interest mapping
Investigation and analysis	Process pipeline maps; gap analysis; root cause identification across multiple processes
Requirements engineering	25+ AI opportunity specifications with complexity, effort, and ROI analysis
Business case and benefits realisation	Full ROI portfolio; payback period analysis; build-vs-buy threshold framework
Strategic context and environment	Market segmentation analysis; competitive landscape; regulatory environment review
AI application development	Three applications built by month four; full professional tech stack demonstrated
Ethics and responsible AI	HIPAA, FCA, and GDPR considerations embedded throughout all three case studies
Change management	Adoption design principles applied across all three business contexts

The Investment Case

There are businesses that spend £100,000–£250,000 on external consultants to produce an AI transformation strategy, a further £250,000–£400,000 having that strategy's priority applications built out, and then £30,000–£50,000 every year in ongoing fees. The documents and the applications remain. The knowledge, the context, and the capability to do it again — does not. The three businesses in these case studies took a different route.

1 Strategy and Roadmap

External: £100k–£250k | Internal: £0 additional cost

Producing a credible AI transformation strategy — stakeholder elicitation, end-to-end pipeline mapping, 20+ AI opportunity specifications with complexity and feasibility assessment, phased implementation planning — requires senior analytical expertise and genuine time inside the business. The apprenticeship route produces the same output. The cost difference: the levy, which is already paid.

2 Build-Out

External: £250k–£400k | Internal: dramatically reduced

The apprentice builds AI applications personally during the programme. An internal BA who can write a well-scoped, category-classified specification also reduces external build cost by 20–30% across a portfolio, by eliminating the ambiguity that generates expensive development iterations.

3 Business Impact of Deployed AI

20–40%	10–30%	10–20%	30–60%
new customer acquisition	customer lifetime value	operating cost reduction	quality improvement

These are not projections from a vendor brochure. They are grounded in the specific findings across the three case studies.

4 Build Capability, Not Dependency

Ongoing consultancy: £30k–£50k/yr | Internal route: £0

The consultancy model builds capability in the consultant, not in the business. The apprentice who produced these case study outputs will still be in the business next year, at a higher stage of the AI maturity framework, capable of planning the next iteration at no additional cost. The ongoing consultancy cost disappears entirely.

5 Net Cost

£30,000

The Full Comparison

Dimension	External Route	Internal Route
Strategy and roadmap	£100,000–£250,000	£0 additional cost
Build-out of 30+ solutions	£250,000–£400,000	Progressive build; external costs reduced 20–30%
New customer acquisition	20–40% increase	Available to both routes
Customer lifetime value	10–30% increase	Available to both routes
Operating cost reduction	10–20%	Available to both routes
Quality improvement	30–60%	Available to both routes
Ongoing maintenance	£30,000–£50,000/yr	£0 — internal capability retained
Net cost (non-levy employer)	—	**£900 per apprentice**
Year-one cost avoidance	—	**£350,000–£650,000**

The three businesses in this portfolio did not spend £250,000 on consultants. They spent eleven months building something better: an internal person who could see what their business needed, specify it rigorously, and then build the first wave of it themselves — with full context, full commitment, and no exit date.

Stage 4 in four months. Stage 5+ within two to three years of continued practice. Not a document. A person. In the business. Getting better.

Take the Next Step

The work in this document was produced by organisations within 16 weeks. If what you have read prompts a question — about the programme, the right next step is a discovery conversation.

Book a Discovery Call

All businesses in this document have been anonymised. No company names, individual names, financial identifiers, or locating details appear. The AI opportunity catalogues, process pipeline maps, ROI analyses, and implementation roadmaps are genuine outputs produced within 16 weeks.

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