

AI Opportunity & Risk Review

Illustrative report for an office-based SME

Prepared for

Example Business Limited

Prepared by

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This document is an illustrative sample only. The organisation, observations, risks, priorities and figures are fictional and are included solely to show the format of a typical MacCaba review.

Where AI can help - and where control matters.

This sample assumes a 25-person SME with office-based staff, document-heavy workflows, recurring email and spreadsheet activity, and informal use of generative AI by some employees.



Illustrative management view

Area	Illustrative finding	Priority
Administration	Recurring email, document handling and data entry create avoidable repetition.	High
Documents	Manual extraction and routing slows down office processes.	High
Internal knowledge	Procedures and information exist but can be slow to find.	Medium
AI governance	Employees have started using AI without one clear framework.	High

Illustrative recommendation

Begin with one low-risk, high-frequency workflow and a short governance baseline. Measure the result before expanding into additional processes.

Potential workflows ranked by value, feasibility and control.

The actual review would be based on interviews, process walkthroughs and the systems used by the client. The examples below are fictional.

Recurring email	Draft and organise recurring communications from approved workflow data.	High	Low	Human approval
Document intake	Extract key fields and route documents for review.	High	Medium	Mandatory review
Meeting actions	Convert notes into structured tasks and follow-up drafts.	Medium	Low	Review before
Internal procedures	Search approved internal guidance through a controlled knowledge assistant.	Medium	Medium	Source citation
Management reporting	Assist with first-draft narrative from approved figures.	Medium	Medium	Management review
Inbox triage	Classify incoming requests and suggest routing.	Medium	Low	No autonomous
Template drafting	Produce first drafts from controlled business templates.	Medium	Low	Human sign-off

How priorities are selected

MacCaba prioritises opportunities that combine meaningful repetition, clear inputs, measurable outcomes and a manageable risk profile. High-risk or judgement-heavy processes may remain unsuitable for automation even if technically possible.

Controls should be designed before scale.

This sample shows the type of governance questions considered alongside workflow opportunities.

Confidential information	Staff may paste business, customer or personal data into unapproved public AI tools.	Approved-tool list; clear data rules; staff guidance.	High
Accuracy	Generated content may contain plausible but incorrect statements.	Human review; source checking; no autonomous critical decisions.	High
Accountability	Ownership of AI-assisted output may be unclear.	Named process owner and reviewer for each use case.	Medium
Personal data	AI use may introduce privacy and data-handling risks.	Data minimisation; approved systems; privacy review where needed.	High
Security	Unvetted tools or integrations may expose systems or information.	Vendor review; access controls; least-privilege approach.	High
Change management	Automation may fail if staff do not understand the new process.	Training, documentation and measured rollout.	Medium

A 90-day roadmap focused on learning before scale.

A typical roadmap starts with governance basics and one measurable workflow, then expands only when the result is clear.

DAYS 1-30

Baseline & pilot

- Confirm approved AI tools and data rules
- Map one high-frequency workflow
- Define owner, reviewer and success measure
- Build and test a controlled pilot

DAYS 31-60

Measure & improve

- Collect user feedback
- Measure time, quality and exceptions
- Adjust prompts, workflow and controls
- Document the operating procedure

DAYS 61-90

Expand carefully

- Decide whether the pilot should scale
- Prioritise the next two workflows
- Train relevant staff
- Review governance and ownership

The goal is a business case - not more software.

A MacCaba review should leave management with a short list of worthwhile opportunities, clear risks, and a practical next step.

01**Decide**

Choose what is genuinely worth implementing.

02**Control**

Set the minimum governance needed before rollout.

03**Implement**

Build one focused workflow and measure the result.

04**Improve**

Expand only when the evidence supports it.

Free consultation

Bring one business process that is wasting time. MacCaba will use a short, no-obligation conversation to understand the workflow and whether AI or automation is a sensible fit.

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