



THE METHOD

A SMART BIRD AGENTS PROCESS

# The Agent Savings Map.

## A Process That Finds The Money.

Most AI sales calls are vibes and slide decks. Ours starts with a disciplined interview that turns messy manual work into a ranked, dollar-denominated automation roadmap.

IDENTIFIES \$168,985 IN YEAR-ONE SAVINGS FOR A TYPICAL 110-PERSON CONSTRUCTION FIRM.

<b>5 steps</b> GUIDED INTERVIEW	<b>Ranked</b> BY ROI & FEASIBILITY	<b>Dollar figures</b> NOT VIBES	<b>Shareable report</b> YOURS TO KEEP
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A 30-MINUTE CALL · NO OBLIGATION · FREE

## Let's Map Your Savings.

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THE METHOD

# Five Steps. From “What Do You Even Do?” To **A Ranked Roadmap.**

Sample numbers below are from a typical 110-person construction client. Your numbers will be different, but the process is identical.

<p><b>01</b></p> <p>ROLE COST MAP</p>	<p><b>Map the back office.</b></p> <p>We list every back-office role, headcount, and fully loaded cost. You will see, on one page, the total annual labor spend that is actually in scope for automation.</p>	<p>SAMPLE OUTPUT</p> <p>ANNUAL ROLE COST</p> <p><b>\$1,365,000</b></p> <p>15 ROLES · 9 CATEGORIES</p>
<p><b>02</b></p> <p>WORKFLOW INVENTORY</p>	<p><b>List the repeat work.</b></p> <p>For each role, we capture every recurring workflow. Frequency, time per run, monthly hours. The repetitive stuff humans should not be doing surfaces fast.</p>	<p>SAMPLE OUTPUT</p> <p>MANUAL WORKFLOW COST</p> <p><b>\$487,920</b></p> <p>10 WORKFLOWS MAPPED</p>
<p><b>03</b></p> <p>WORKFLOW STEP MAP</p>	<p><b>Break each one open.</b></p> <p>Pick a workflow and we walk through it click-by-click. Every tool opened, every copy-paste, every email sent. And where an agent could do it instead.</p>	<p>SAMPLE OUTPUT</p> <p>AUTOMATION POTENTIAL</p> <p><b>70%</b></p> <p>PER HIGH-VALUE WORKFLOW</p>
<p><b>04</b></p> <p>AGENT FIT SCORE</p>	<p><b>Score each candidate.</b></p> <p>Each workflow gets a 1 to 25 score across repetition, rules clarity, tool access, judgment required, exception rate, and savings potential. No guessing what is automatable.</p>	<p>SAMPLE OUTPUT</p> <p>TOP-TIER CANDIDATES</p> <p><b>20-25</b></p> <p>EXCELLENT AGENT FITS</p>
<p><b>05</b></p> <p>ROI &amp; ROADMAP</p>	<p><b>Rank by dollars.</b></p> <p>Every workflow gets annual savings, payback period, and feasibility. You walk away with a ranked roadmap. What to build first, second, third, and what to leave alone.</p>	<p>SAMPLE OUTPUT</p> <p>YEAR-ONE SAVINGS</p> <p><b>\$168,985</b></p> <p>ACROSS 10 WORKFLOWS</p>



STEP 01

# Map The Back Office.

Before you can find waste, you have to find where the labor lives. List every operational role that touches back-office work, and put a dollar figure on it.

### ROLES TO INVENTORY

- Operations coordinators
- Office managers, AP specialists
- Project coordinators
- Compliance administrators
- Customer onboarding staff
- HR coordinators, dispatchers

### THE MATH

**Fully-loaded cost = salary × 1.25 to 1.4**

Covers benefits, payroll taxes, equipment, software seats, and management overhead. Use 1.3 if you do not have a better number.

### EXAMPLE OUTPUT · REDWOOD RIDGE CONSTRUCTION

ROLE	HEADCOUNT	LOADED COST	ANNUAL TOTAL
Project Coordinator	4	\$85,000	<b>\$340,000</b>
AP Specialist	2	\$75,000	<b>\$150,000</b>
Project Accountant	2	\$92,000	<b>\$184,000</b>
Estimating Coordinator	2	\$82,000	<b>\$164,000</b>
Compliance Administrator	1	\$78,000	<b>\$78,000</b>
Office Manager, AR, Payroll, HR	4	\$112,250	<b>\$449,000</b>
<b>Operational labor base</b>	<b>15</b>		<b>\$1,365,000</b>

**The Role Cost Map is the denominator.** Until you put a dollar figure on operational labor, you cannot quantify what automation is worth. The number above is the ceiling you are working against.



STEP 02

# List The Repeat Work.

Interview the people doing the work. Capture every recurring workflow. Frequency, time per run, monthly hours. The repetitive stuff that should not be done by humans surfaces fast.

### ASK THESE FIVE QUESTIONS

- What do you do every day that repeats?
- What tasks do you dread?
- What slows you down or creates a bottleneck?
- What requires constant follow-up to close out?
- If you took a two-week vacation, what would pile up?

### CAPTURE FOR EACH WORKFLOW

- Frequency (per day, week, month)
- Time per run (in minutes)
- Role(s) involved
- Systems touched (Gmail, QuickBooks, etc.)
- Monthly hours (frequency × time)

### EXAMPLE OUTPUT · REDWOOD RIDGE WORKFLOW INVENTORY (EXCERPT)

WORKFLOW	ROLE	MONTHLY HRS	ANNUAL COST
Vendor invoice intake and coding	AP Specialist	40	<b>\$43,200</b>
Weekly job costing packet	Project Accountant	20	<b>\$50,400</b>
Project closeout packet assembly	Project Coordinator	56	<b>\$59,136</b>
Change order document prep	Project Coordinator	30	<b>\$30,600</b>
Subcontractor insurance collection	Project Coordinator	20	<b>\$20,400</b>
Bid document organization	Estimating Coordinator	20	<b>\$21,120</b>
<b>Total manual workflow cost (10 workflows)</b>			<b>\$487,920</b>



STEP 03

# Break Each One Open.

Pick one workflow and walk through it click by click. Most companies discover their employees are acting as human glue between systems that should be talking to each other.

EXAMPLE · VENDOR INVOICE INTAKE, STEP-BY-STEP

STEP	ACTION	TOOL	MANUAL WORK	AGENT?
1	Receive invoice	Gmail	Read email, identify attachment	YES
2	Download PDF	Browser	Save with naming convention	YES
3	Extract invoice data	PDF reader	Read line items, vendor, total	YES
4	Enter bill, code GL	QuickBooks	Manual data entry, GL coding	YES
5	Detect duplicates	QuickBooks	Search for prior bills	YES
6	Route for approval	Email	Identify PM, send, follow up	PARTIAL
7	File for audit	SharePoint	Save to project folder	YES

WHAT WE LEARN

**7 steps. 5 systems. 8 minutes per invoice.**

At 300 invoices a month, that is 40 hours of someone's life moving data between systems.

AUTOMATION READ

**6 of 7 steps are agent-native.**

Only approval routing keeps a human-in-the-loop. That is a 70% automation target, conservative.



STEP 04

# Score Each Candidate.

Not every workflow is a good first agent. Each candidate gets a 1 to 25 score across five dimensions. The total drives priority. No guessing what is automatable.

## THE SCORING RUBRIC · 1 TO 5 PER DIMENSION

DIMENSION	WHAT IT MEASURES	HIGHER SCORE WHEN...
<b>Repetition</b>	How often the workflow occurs in a typical month or week.	It runs constantly
<b>Rules clarity</b>	How deterministic the steps are. Can you write them as if-then?	Steps are explicit
<b>Tool access</b>	Whether the agent can reach the systems through APIs, browsers, or files.	Systems are reachable
<b>Exception rate</b>	How often edge cases require human intervention. Inverted: lower exceptions, higher score.	Edge cases are rare
<b>Savings potential</b>	Annual dollar savings the workflow could produce if mostly automated.	5-figure savings+

## READING THE SCORE · TOTAL OUT OF 25

**20 TO 25**

**Build now**

High repetition, clear rules, reachable systems. This is a 30 to 90-day agent.

**14 TO 19**

**Worth scoping**

Some friction (exceptions, tool access, judgment). Build after the easy wins.

**UNDER 14**

**Not yet**

Either too much judgment or too unstable. Document the process first.



STEP 05

# Rank By Dollars.

Buyers convert on dollar figures, not hours. Translate every qualified workflow into a year-one savings number using a single, defensible formula.

THE FORMULA

**Year-one savings =  
monthly hours × loaded hourly rate × 12 × automation  
%**

WORKED EXAMPLE · VENDOR INVOICE INTAKE

INPUT	VALUE	SOURCE
Monthly hours	40	From Step 02 (Workflow Inventory)
Loaded hourly rate	\$45	AP Specialist, fully-loaded
Months per year	12	Annualize
Automation percentage	70%	Conservative for exceptions and review
<b>Year-one savings</b>	<b>\$15,120</b>	For one workflow alone

CALIBRATION NOTE

For growing SMBs, the most valuable output of automation is often the next hire you do not have to make. That is \$80K to \$120K of avoided cost per role per year.

THROUGHPUT NOTE

Faster invoice processing means faster vendor payment, better discounts, fewer late fees. These show up outside the savings line.



SAMPLE OUTPUT

# What You Walk Away With. A Full Report. Concrete Numbers.

A sample Agent Savings Map report for Redwood Ridge Construction, a typical 110-person commercial GC. 15 back-office roles, 10 workflows mapped, \$168,985 in identified year-one savings.



AGENT SAVINGS MAP REPORT

PREPARED 05.20.2026

PREPARED FOR

## Redwood Ridge Construction, Inc.

110 employees · 15-person back office · Commercial construction

ANNUAL LABOR ANALYZED

**\$1,365,000**

MANUAL WORKFLOW  
COST

**\$487,920**

AUTOMATABLE VALUE

**\$263,580**

PHASE 1 SAVINGS

**\$142,800**

### WHY THIS MATTERS

The report is not a slide deck. It is a one-page summary, a ranked workflow list, and a recommended first build with payback. You can hand it to a CFO without translation.

### WHAT COMES NEXT

Bring it to a 30-minute call. We sanity-check the numbers, sharpen the top opportunity, and quote a fixed-price agent buildout on the spot.



SECTION 5

RANKED BY FEASIBILITY × SAVINGS

# Top Automation Opportunities.

RANK	WORKFLOW	MANUAL COST	% AUTO	YEAR-1 SAVINGS	FIT
1	Vendor invoice intake and coding	\$43,200	70%	<b>\$30,240</b>	HIGH
2	Weekly job costing packet	\$50,400	55%	<b>\$27,720</b>	MEDIUM
3	Project closeout packet assembly	\$59,136	45%	<b>\$26,611</b>	MEDIUM
4	Change order document prep	\$30,600	60%	<b>\$18,360</b>	HIGH
5	Subcontractor insurance collection	\$20,400	75%	<b>\$15,300</b>	HIGH
6	Bid document download & organization	\$21,120	65%	<b>\$13,728</b>	HIGH
TOTAL IDENTIFIED YEAR-ONE SAVINGS (10 WORKFLOWS)				<b>\$168,985</b>	

SECTION 6 · BUILD 1 OF 3

## Invoice Intake Agent

Vendor invoice intake, extraction, GL coding, duplicate detection, draft bill, approval routing. Built on top of QuickBooks and Gmail.

EXPECTED SAVINGS

# \$30,240/yr

PAYBACK PERIOD

## 3 to 5 months

WHY FIRST

High volume, clear rules, structured documents. Most defensible win. De-risks the rest of the roadmap.

NEXT STEP · A 30-MINUTE CALL · FREE

## Let's Map Your Savings. Then Let's Build It.

GET STARTED  
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