ARVEXO

EXAMPLE. FIGURES ARE ILLUSTRATIVE

DIAGNOSTIC BOOK

Sample Distribution Ltd.

Wholesale distribution · 85 people · revenue €25M a year · margin 18%

€944,800 / year

in margin the company loses at five points. Wave 1 closes €538,000 / year.

DIAGNOSTIC BY

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How to read this book

COLOURS

Amber marks a loss or a problem: “today”, the cost of a loss.

Cyan marks the system: AI agents, code, “with AI agents”.

LABELS

`fact` it is in your exports or documents

`calculation` a formula with your figures

`estimate` no figure available, a cautious estimate

Losses are counted in margin or direct costs, not revenue. Only from the company’s data, no market averages. Overdue receivables are shown separately: they are frozen cash, not a loss.

EXAMPLE

The company loses €944,800 in margin a year at five points

€78,700 / month
lost per month

16 / 12
processes described / can be automated

210 h/month
of manual sales work AI agents take over

€620,000
overdue receivables — frozen cash

The three largest losses

Contracts lost because of slow quotes	€288,000 / year
Uncontrolled discounts and outdated prices	€250,000 / year
Customers who quietly stopped ordering	€216,000 / year

WHAT WE IMPLEMENT FIRST

Wave 1: quote AI agent and discount limits. Effect €538,000 / year. Timeline 4–6 weeks.

Roles: 210 h/month of routine equals 1.3 full-time reps. The two reps planned for growth do not need to be hired.

THE MAIN RISK IF NOTHING CHANGES

Two senior reps handle 40% of turnover, €10M a year. Their customer history lives in personal WhatsApp chats. If one leaves, the company loses customers just as in point 5, only several times more.

Source: owner interview, voice notes and screen recordings from 5 employees, Pipedrive and SAP Business One exports for 12 months.

EXAMPLE

From request to payment: 6 steps, 4 systems, 3 manual hand-offs

This is how a customer request travels through the company today. Amber marks where work is done by hand and money gets lost.

1 **Request** — email, web, WhatsApp — rep re-types it

2 **Logging** — Pipedrive

3 **Quote** — Excel + SAP — by hand, 3 days

4 **Discount** — phone — no limit

5 **Invoice and shipping** — SAP Business One, carrier portal

6 **Payment** — bank, SAP — overdue seen late

Company map

3	6	4	38	24	5	5
Management	Sales	Purchasing	Warehouse	Logistics	Accounting	Admin & IT

WHERE THE DATA LIVES

Pipedrive	requests, deals, quote dates; 60% filled in
SAP Business One	sales, prices, stock, receivables
Excel	price list, owner report, sales plan
WhatsApp	customer agreements, reps' personal chats

WHAT WORKS WELL AND STAYS AS IS

Warehouse and shipping: stock in SAP is accurate, shipping labels are created from SAP automatically. Automation adds nothing here.

Source: owner interview, org chart, voice notes from 5 employees, reps' screen recordings.

EXAMPLE

Who the company depends on

SHARE OF TURNOVER BY REP, %



Source: SAP Business One, sales by account owner for 12 months. Total 100% = €25M.

PERSON	WHAT ONLY THEY KNOW	WHAT HAPPENS IF THEY LEAVE
Senior reps 1 and 2	History, prices and agreements for 40% of customers	**Up to €10M of turnover at risk. It has happened before: point 5.**
Head of sales	Who got which discount and why	**Discounts become even less controlled**
Chief accountant	Whom to remind about payment and when	**Overdue receivables grow**

WHAT WE DO ABOUT IT

We move customer history from personal chats into the company's digital brain (wave 2). Then the customer belongs to the company, not to the rep.

Note: employee names are replaced with roles. In a real book you see your own employees' names; counterparties stay masked.

LOSS POINT 1 OF 5

Contracts lost because of slow quotes

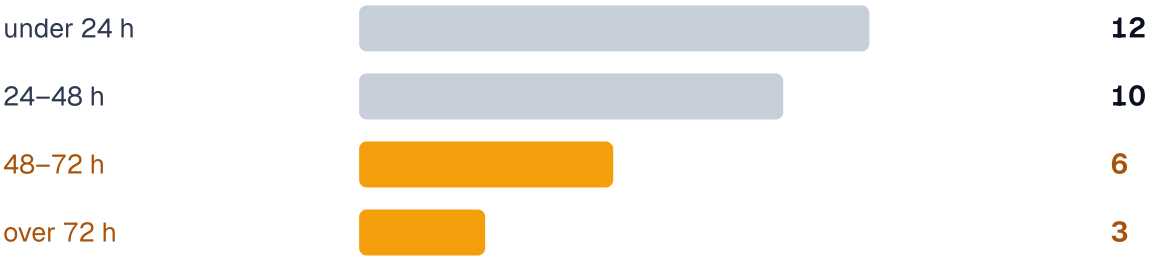
Large requests wait two to three days for a quote. Meanwhile the customer gets an offer from a competitor and signs with them.

COST **€288,000 / year** €24,000 / month

CALCULATION

`4 contracts a year × €400,000 volume × 18% margin`

TIME FROM REQUEST TO QUOTE, REQUESTS OVER €200,000, COUNT



9 requests waited over 48 hours for a quote. 4 of them were closed with the reason “chose another supplier”.

LABEL

fact + calculation

WAVE

1

COVERED BY

Quote AI agent. Prepares a quote from current prices and stock in 40 minutes. The rep approves sending.

SOURCE

Pipedrive: 31 requests over €200,000 in 12 months, request and quote dates, loss reasons. A rep's screen recording of how a quote is built.

LOSS POINT 2 OF 5

Uncontrolled discounts and outdated prices

Discounts are approved by phone, with no limit. Some quotes go out on a price list that is no longer current.

COST **€250,000 / year** €20,800 / month

CALCULATION

`0.7% of revenue on discounts above policy + 0.3% on outdated prices = 1% × €25,000,000`

WHAT WE FOUND	CALCULATION	PER YEAR
Discounts above the 5% policy: 2 p.p. on average, on 35% of turnover	2% × 35% = 0.7% of revenue	€175,000
Quotes on a price list 1–3 weeks out of date after supplier price increases	0.3% of revenue	€75,000
Total	**1% of revenue**	**€250,000**

LABEL

calculation

WAVE

1

COVERED BY

Code, not AI: discount limits in SAP Business One and Pipedrive, old price lists blocked. The head of sales approves anything above the limit.

SOURCE

SAP Business One: price list and actual invoiced prices for 12 months. Discount policy. Voice note from the head of sales.

LOSS POINT 3 OF 5

Customers who quietly stopped ordering

Regular customers drop out of their order cycle, and nobody notices until a quarter has passed.

COST **€216,000 / year** €18,000 / month

CALCULATION

6 customers × €200,000 a year on average × 18% margin

CUSTOMER (NAMES MASKED)	ANNUAL VOLUME BEFORE CHURN	LAST ORDER
Customer K-0412	€280,000	4 months ago
Customer K-0177	€240,000	5 months ago
Customer K-0938	€220,000	4 months ago
Customer K-0251	€180,000	6 months ago
Customer K-0619	€160,000	5 months ago
Customer K-0083	€120,000	4 months ago
Total	**€1,200,000**	

Nobody called any of the six customers after their last order: there are no tasks in Pipedrive.

LABEL

fact + calculation

WAVE

2

COVERED BY

Customer AI agent. Sees that a customer missed their usual order cycle and assigns a task to the rep the same day.

SOURCE

SAP Business One: sales by customer by month for 12 months. A customer counts as lost after missing 3 cycles in a row.

LOSS POINT 4 OF 5

Manual routine of sales reps

Reps move data between systems every day and answer the same questions instead of selling.

COST **€100,800 / year** €8,400 / month

CALCULATION

`3 reps × 70 h/month × €40 per hour × 12 months`

ROUTINE	H/MONTH	PER YEAR
Taking requests from email, web, WhatsApp	60	€28,800
Moving data Pipedrive ↔ SAP	80	€38,400
Answering routine customer questions	70	€33,600
Total	**210**	**€100,800**

Quote preparation (96 h/month) is not added here: its effect is already counted in point 1, so we don't count it twice.

LABEL

calculation + hourly cost estimate

WAVE

3

COVERED BY

Hybrid: code moves data between Pipedrive and SAP, an AI agent takes requests and answers routine questions.

SOURCE

Voice notes and screen recordings from 3 reps. Hourly cost: the rep's total employment cost ÷ working hours.

LOSS POINT 5 OF 5

A rep left — customers left

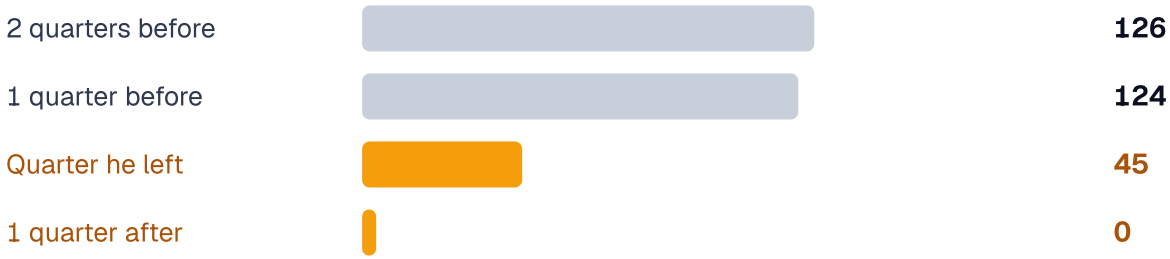
Customer history, agreements and prices live in the rep's personal WhatsApp. When he leaves, the customers follow.

COST **€90,000 / year** €7,500 / month

CALCULATION

`customers worth €500,000 turnover a year × 18% margin`

ORDERS FROM THE 9 CUSTOMERS OF THE REP WHO LEFT, € THOUSAND PER QUARTER



Before he left these customers brought €500,000 of turnover a year. A quarter after he left, none of them ordered.

LABEL

fact + calculation

WAVE

2

COVERED BY

The company's digital brain: the full customer history in one database, not in personal chats. The customer agent works with it.

SOURCE

SAP Business One: 9 customers of the rep who left, orders before and after. No overlap with the customers in point 3.

Loss summary

№	LOSS POINT	WAVE	PER MONTH	€ / YEAR
1	Contracts lost because of slow quotes	1	€24,000	**€288,000**
2	Uncontrolled discounts and outdated prices	1	€20,800	**€250,000**
3	Customers who quietly stopped ordering	2	€18,000	**€216,000**
4	Manual routine of sales reps	3	€8,400	**€100,800**
5	A rep left — customers left	2	€7,500	**€90,000**
	Total		**€78,700**	**€944,800**

LOSS STRUCTURE



Three of the five largest losses are in sales, not routine: €754,000 of €944,800.

SEPARATELY: FROZEN CASH

Overdue receivables: **€620,000**, of which €180,000 is over 60 days. Not a loss, but cash the company cannot use. The payment agent (wave 2) reminds customers on schedule and shows the owner what is overdue every day. Not included in the loss total.

Losses are counted in margin and direct costs, not revenue.

EXAMPLE

The company operating system

Not a set of separate bots but one system: data in one place, agents for tasks, an orchestrator above them and a dashboard for the owner.

OWNER DASHBOARD

Sales, quotes in progress, customers at risk, discounts above the limit, receivables. Without asking the reps.

ORCHESTRATOR

The lead agent: distributes tasks between agents and people, tracks deadlines.

Quote agent
quotes from current prices and stock
WAVE 1

Discount limits
code in SAP and Pipedrive
WAVE 1

Customer agent
watches order cycles
WAVE 2

Payment agent
reminds, shows overdue
WAVE 2

Request agent
takes requests 24/7
WAVE 3

Reporting agent
owner report without Excel
WAVE 3

THE COMPANY'S DIGITAL BRAIN

One knowledge and data base: SAP, Pipedrive, price list, email, every customer's history.

WHERE A PERSON ALWAYS DECIDES

Sending a quote, a discount above the limit, a contract, a payment, anything sent outside. Without a person's approval the agent technically cannot do it.

EXAMPLE

How the sales team's work changes

TODAY	WITH AI AGENTS	ROUTINE THAT GOES AWAY	WHAT STAYS WITH PEOPLE
Quotes are built from Excel and SAP in three days	The quote agent drafts one in 40 minutes, the rep checks and sends it	no more looking up prices and stock	negotiation and customer decisions
Discounts approved by phone, with no limit	Within the limit — instantly. Above the limit — only with the head of sales' approval	no calls to the boss every time	the head of sales decides exceptions
A customer disappears — noticed a quarter later	The customer agent sees a missed cycle and assigns a task the same day	no keeping cycles in your head	the conversation with the customer
Customer history in the rep's WhatsApp	History in the company's digital brain, role-based access	no digging through chats	the relationship with the customer
Requests re-typed into Pipedrive by hand	The request agent takes a request from any channel and creates the deal	no re-typing	qualifying large requests

210 h/month
of routine moves to agents

40 min
instead of 3 days per quote

same day
reaction to a customer who missed a cycle

For the team we prepare a separate short version: what changes in their work and how we train them. Its message: less routine, more useful work.

EXAMPLE

For the owner: a vacancy or an AI agent

For 2027 the company planned to hire two more reps to support 20% growth. We calculated what the system covers.

TWO NEW VACANCIES

2 × €4,500 total monthly cost × 12

€108,000 / year

Plus 2–3 months to hire and 3 months to ramp up. Knowledge again stays with people.

AGENTS OF WAVES 1 AND 3

210 h/month of routine + 96 h/month on quotes = 306 h/month

≈ 1.9 FTE

They work 24/7, don't quit and don't take customers with them. Knowledge stays in the company.

CONCLUSION

20% growth can be handled by the current team. Compare the cost of two vacancies, €108,000 / year, with the proposal for waves 1 and 3. Implementation cost is not part of the book.

FTE calculation: 160 working hours a month. 306 ÷ 160 ≈ 1.9. calculation

EXAMPLE

16 processes, 12 to automate

№	PROCESS	DEPT	DONE BY HAND	H/MO	COVERED BY	CHECKED BY	WAVE
01	**Taking requests from email, web, WhatsApp**	Sales	Rep re-types the request into Pipedrive	60	Hybrid	Rep	3
02	**Preparing quotes**	Sales	Prices from Excel, stock from SAP, Word template	96	AI agent	Rep	1
03	**Approving discounts**	Sales	Phone call to the head of sales, no limit	14	Code	Head of sales	1
04	**Updating the price list**	Purchasing	Excel, emailed to reps	12	Code	Buyer	1
05	**Watching repeat orders**	Sales	Not done	—	AI agent	Rep	2
06	**Customer history**	Sales	In reps' personal WhatsApp	—	Hybrid	Head of sales	2
07	**Payment reminders**	Accounting	Calls now and then, when someone remembers	16	AI agent	Accountant	2
08	**Moving data Pipedrive ↔ SAP**	Sales	By hand, daily	80	Code	—	3
09	**Answering routine customer questions**	Sales	Stock, status, invoice — the rep	70	AI agent	Rep, spot checks	3
10	**Issuing invoices**	Accounting	From SAP by hand per order	22	Code	Accountant	3
11	**Weekly owner report**	Management	Excel every Monday	24	Code	—	3
12	**Contract drafts**	Sales	Word template, edited by hand	10	Hybrid	Head of sales	3
13	Shipping labels	Warehouse	Carrier portal, works well	—	Not automated	—	—
14	Stock and reservations	Warehouse	SAP, works	—	Not automated	—	—
15	Negotiating with key accounts	Sales	A person	—	Not automated	—	—
16	Choosing suppliers	Purchasing	Buyer's decision	—	Not automated	—	—

5
covered by plain code

4
AI agents

3
hybrid: code + agent

4
not automated: already works or a human decision

We use an AI agent only where text or context must be understood. Where a rule is enough we write code: it is cheaper and does not make mistakes.

EXAMPLE

What we implement first

1 Quick wins

4–6 weeks · estimate

€538,000 / year

WHAT WE DO

Quote AI agent. Discount limits and blocking of old price lists in SAP and Pipedrive.

HOW WE MEASURE

Time from request to quote; share of large requests without a quote in 24 h; average discount vs limit.

2 Customers and history

6–8 weeks · estimate

€306,000 / year

WHAT WE DO

Digital brain with customer history. Customer agent. Payment agent.

HOW WE MEASURE

Customers who missed a cycle and came back; days to react; receivables over 30 days.

3 Operating system

6–8 weeks · estimate

€100,800 / year

WHAT WE DO

Orchestrator. Owner dashboard. Request agent, data sync, routine answers.

HOW WE MEASURE

Reps' routine hours before and after; owner report without Excel.

WHAT WE NEED FROM THE COMPANY

- Access to the Pipedrive API and an SAP interface
- One responsible person: the head of sales, 3–4 h a week
- The owner's decision on discount limits before wave 1
- Senior reps hand over their customer history in wave 2

RISKS AND HOW WE HANDLE THEM

- **Reps resist transparency.** We show that the routine goes, not them. Training before launch.
- **Pipedrive is 60% filled in.** We clean the customer base in wave 1.
- **The agent gets a price wrong.** The rep technically approves every quote.

EXAMPLE

Effect by wave

WAVE		H/MONTH	EFFECT PER YEAR	PER MONTH
1	Quick wins	96	**€538,000**	€44,800
2	Customers and history	—	**€306,000**	€25,500
3	Operating system	210	**€100,800**	€8,400
	Total	**306**	**€944,800**	**€78,700**

THE EFFECT BUILDS UP WAVE BY WAVE, € PER MONTH



HOW WE MEASURE

Every solution has a built-in “before / after” measurement: quotes, returned customers, average discount, routine hours. The dashboard shows it to the owner weekly.

WHAT IS NOT HERE

The implementation cost. It is in a separate proposal. Payback is calculated as: wave cost ÷ monthly effect. The book stays yours, whoever implements it.

EXAMPLE

Security and data

HOW WE PROCESSED IT

Names, phones and emails of customers' contacts were replaced with tokens before AI processing. Prices, discounts and margin were not masked: losses can't be calculated without them.

ACCESS IN THE SYSTEM

Owner — everything. Head of sales — sales and discounts. Rep — own customers. Accountant — payments. Agents see only the data their task needs.

AI NEVER WITHOUT A PERSON

Sending a quote, a discount above the limit, a contract, a payment, deleting data.

Appendix 1. Register of materials received

SOURCE	WHAT	PERIOD	VOLUME
Pipedrive	deals, requests, quote dates, loss reasons	12 mo	1,846 deals
SAP B1	sales by customer by month	12 mo	412 customers
SAP B1	price list and actual prices, discounts	12 mo	9,730 rows
SAP B1	receivables by age	as of 30 Sep	1 file
Voice notes	owner, head of sales, 3 reps	—	5 × 15–25 min
Screen recordings	quote, data transfer, invoice	—	3 × 10–15 min
Documents	discount policy, quote and contract templates, org chart	—	7 files

Appendix 2. Glossary in plain words

AI agent
Software that does an employee's work: reads a request, drafts a quote, assigns a task. Works 24/7. A person approves what matters.

Digital brain
The company's single knowledge and data base that agents work with.

Orchestrator
The lead agent. Distributes tasks between agents and people and tracks deadlines.

Integration
A link between systems so data moves by itself, without re-typing.

ARVEXO

EXAMPLE. FIGURES ARE ILLUSTRATIVE

WHAT HAPPENS NEXT

We build a book like this about your company

01

A 30-minute call, free

We look at how an order travels from request to payment and name 1–2 likely loss points.

02

NDA and materials from our checklist

1–2 hours from the owner, about an hour from key people, 12-month exports.

03

The diagnostic book

From 5 business days after we receive the materials. A 60–90 minute handover meeting. The book is yours.

TELEGRAM & WHATSAPP

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FOUNDER

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I REPLY

within 2 business hours