

# AI Automation: Process Audit vs Pilot — Which to Start With

A decision guide for choosing your first step in a B2B automation program

## Direct answer: should you start with an audit or a pilot?

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A process audit **maps** where automation can help — it produces a prioritised list of opportunities and a baseline you can measure against. A pilot **proves** value on one workflow with measurable outcomes. They are complementary, not either/or: a short audit to pick the right first workflow, then a scoped pilot to prove it. Start with an audit if you do not yet know your highest-impact workflow. Start straight into a pilot if you already have an obvious, measurable, rules-based candidate.

## What a process audit is — and what it produces

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A process audit is a structured look across your B2B teams and departments to find where repetitive, rules-based, or high-volume work is slowing people down. It is diagnostic, not delivery: nothing is automated during an audit. The point is to understand the terrain before you commit effort, so your first build lands on the workflow that actually matters.

A good audit produces:

- **A prioritised list of automation opportunities**, ranked by impact and by how well each fits automation (clear rules, structured inputs, measurable outputs).
- **A baseline for each candidate** — the current volume, handling time, cycle time, and error or rework rate — so you can tell later whether anything actually improved.
- **A shortlist of good first workflows**: the ones that are measurable, rules-based, and contained enough to prove value quickly without touching everything at once.

## What a pilot is — and what it produces

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A pilot takes one workflow and automates it for real, in a contained scope, measured against the baseline you started with. It is delivery, not analysis: something runs, people use it, and you watch the numbers. The goal is a clear yes/no on whether automation earns its place before you invest in a broader rollout.

A good pilot produces:

- **A working automation on one workflow**, with humans keeping sign-off on any consequential action rather than the system acting unchecked.
- **Measured outcomes against your own baseline** — did handling time, cycle time, or error rate move, and by how much for your department, not a generic benchmark.
- **A decision you can defend**: expand, adjust, or stop — backed by evidence from your own environment, plus an audit trail of what the system did.

## Audit vs pilot at a glance

Dimension	Process audit	Pilot
Goal	Map where automation can help and pick the right first workflow.	Prove value on one chosen workflow with measurable outcomes.
Output	A prioritised opportunity list plus a baseline for each candidate.	A working automation on one workflow, measured against that baseline.
Timeframe	Short and diagnostic — typically a matter of weeks, since nothing is built.	Scoped and time-boxed — long enough to gather real usage and results, then review.
Risk	Very low: nothing changes in production; the risk is analysis without action.	Contained: one workflow, human sign-off on consequential actions, an audit trail throughout.
Best when...	You do not yet know your highest-impact workflow, or you have many candidates and no baseline.	You already have an obvious, measurable, rules-based candidate worth proving.

The timeframes above are qualitative on purpose. Real durations depend on the workflow, the data, and your department — treat any universal day-count you see in a vendor pitch with suspicion.

### How they fit together: audit → pilot → expand

1. **Audit** to map opportunities and capture a baseline. You come out with a ranked shortlist and the numbers to judge success against.
2. **Pilot** the top candidate. One workflow, human sign-off on consequential actions, an audit trail, and results measured against the baseline from step one.
3. **Expand** only on the strength of that evidence. Move to the next opportunity on the list, repeating the same measured approach rather than automating everything at once.

#### The core principle

Sequence beats scale. A short audit to choose well, then a scoped pilot to prove value, then expansion earned by evidence — each step de-risks the next.

## Avoiding the big-transformation trap

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The failure mode to avoid is the sweeping “AI transformation” program — many workflows, many B2B teams and departments, and a long timeline before anyone sees a result. These stall because scope grows faster than value is proven: nothing is measurable, no single owner can point to an outcome, and the effort quietly loses sponsorship.

- **Start narrow, not broad.** One workflow with a measurable baseline beats ten in-flight and none proven.
- **Insist on a baseline.** If you cannot state the before-numbers, you cannot claim an after-improvement — and “it feels faster” is not evidence.
- **Keep humans in control.** Consequential actions go through approval, and every step is logged, so you can trust and audit what ran.
- **Let evidence pull the next step.** Expansion should follow a proven result, not a roadmap drawn before anything shipped.

## Which should you choose? A short checklist

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Work top to bottom. The first honest “no” tells you to start with an audit; a clean run of “yes” means you are ready to pilot directly.

1. **Do you already know your highest-impact workflow?** If not, audit first — you would be guessing where to build.
2. **Is that workflow rules-based and repetitive?** If the work needs judgement on every case, it is a weaker first pilot.
3. **Can you measure it?** If you cannot state the current volume, handling time, or error rate, an audit to capture a baseline comes first.
4. **Is the scope contained?** One workflow you can pilot without touching everything else is the right size; a sprawling candidate needs narrowing first.
5. **Do you have an owner and a review point?** A pilot needs someone accountable and a date to judge the results against the baseline.

## How SG1 approaches this

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We favour a scoped pilot measured against your own baseline rather than a universal promise. Consequential actions go through human-in-the-loop approval checkpoints; every AI step is logged in an audit trail; models run on private Azure AI that is never trained on your data; and the system works inside your existing Microsoft 365 tenant rather than copying records out. Where you do not yet know the right first workflow, a short audit to map opportunities and set a baseline comes before that pilot.

We deliberately publish no universal ROI percentage — the only ROI that counts is the one measured against your baseline.