The Manufacturing AI Roadmap.

Grow your margins with AI in commercial operations.

1	**Individual know-how**
2	**Standard work**
3	**AI assistance**
4	**Task delegation**
5	**Connected execution**
6	**Autonomous operations**

For commercial leaders in manufacturing

Assess your team. Choose your next step.

START HERE

Grow sales without growing the back office at the same rate.

You want more profitable growth. Yet your commercial team spends much of the week preparing quotations and chasing internal answers. When you take on more business, you often need more people just to keep up.

You cannot fix that by automating quotation preparation alone. Your sales team makes commitments that your planners must deliver. Your finance team measures the result. You need to connect the work across those departments.

Use this roadmap to decide what to delegate to AI next. Assess one business unit at a time. You may already use AI for quotations while your claims team still gathers evidence by hand.

1	**Individual know-how**	You depend on a few experienced people.
2	**Standard work**	You have agreed procedures. Your team still joins everything up.
3	**AI assistance**	Your people use AI to prepare the work.
4	**Task delegation**	You delegate routine work within clear limits.
5	**Connected execution**	You manage the consequences across departments.
6	**Autonomous operations**	You set the direction. You approve the exceptions.

1 Individual know-how

You depend on a few experienced people.

Your sales coordinators know who to call at each plant. Your account directors remember the exceptions in customer agreements. When they take leave, their colleagues spend hours finding answers. You can grow sales, but you keep adding people to handle the work.

Work area	How your team works	What to do next
Quotations	Estimators rely on past experience and personal files.	Document the recurring technical checks and quotation rules.
Pricing and contracts	Account directors remember discounts and customer exceptions.	Record current terms and assign an owner for pricing exceptions.
Order management	Sales coordinators interpret purchase orders and chase missing details.	Agree the checks for order entry and the route for exceptions.
Delivery commitments	Account managers call planners for delivery updates.	Record commitments and agree who confirms delivery dates.
Claims and deductions	Account managers chase evidence from quality and logistics.	Assign a case owner and agree the required evidence.
Account development	Account directors rely on their own knowledge of each customer.	Record account plans and outstanding customer commitments.

YOUR PRIORITY

Make routine work repeatable.

Ask your team to document the decisions they make most often. Agree who owns each exception. Remove duplicate checks before you automate anything.

Measure: Time spent chasing internal answers

BEFORE YOU MOVE ON

• A colleague can handle routine enquiries without calling the usual expert.

• Your team can find the current customer agreement and name the person who approves exceptions.

2 Standard work

You have agreed procedures. Your team still joins everything up.

Your commercial team records customer terms in the CRM and enters orders in the ERP. To answer a delivery question, a coordinator still checks with planning. To review an account, a director still asks finance for the actual costs. You have records, but your people do the reconciliation.

Work area	How your team works	What to do next
Quotations	Estimators use agreed templates but gather information by hand.	Connect the current specification and approved pricing sources.
Pricing and contracts	Sales staff check contracts and price lists manually.	Agree the current source for prices, rebates, and surcharges.
Order management	Coordinators enter orders in the ERP using standard procedures.	Link accepted quotations and customer requirements to order entry.
Delivery commitments	Coordinators compare customer promises with planning records.	Give the team access to current allocation and production status.
Claims and deductions	Claims coordinators use standard files but assemble each case by hand.	Link inspection records and delivery evidence to the customer claim.
Account development	Account directors assemble reviews from sales and finance reports.	Agree how to measure account margin and changes in buying patterns.

YOUR PRIORITY

Give your team a reliable basis for decisions.

Agree with finance and operations which records your team should use. Link customer agreements to the relevant transactions. Resolve conflicting versions before you introduce AI.

Measure: Time to prepare a reliable customer or account update

BEFORE YOU MOVE ON

- Your team can trace a customer commitment to the current agreement.
- Your commercial and operations teams agree how to resolve missing or conflicting information.

3 AI assistance

Your people use AI to prepare the work.

Your estimators use AI to review RFQs and prepare quotations. Your account directors use it to prepare customer reviews. They spend less time assembling information, but they still start every task and check each result before taking the next step.

Work area	How your team works	What to do next
Quotations	Estimators prompt AI to prepare quotations and review every draft.	Measure review effort, then agree which RFQs qualify for automatic preparation.
Pricing and contracts	Pricing analysts use AI to compare terms and prepare margin reviews.	Check recommendations against actual costs and approved commercial policy.
Order management	Coordinators use AI to read purchase orders and prepare entries.	Verify the entries and measure correction effort across order types.
Delivery commitments	Account managers ask AI to prepare delivery updates.	Agree when to escalate a likely delay and who owns the response.
Claims and deductions	Claims handlers use AI to gather evidence and draft responses.	Check completeness and agree the limits for routine follow-up.
Account development	Account directors use AI to prepare customer reviews.	Verify the account history and distinguish opportunities from assumptions.

YOUR PRIORITY

Reduce the total effort, including review.

Choose a frequent task with a clear acceptance standard. Give the reviewer access to the source documents. Compare preparation and correction time across routine cases and difficult exceptions.

Measure: Preparation plus review time; quotation turnaround

BEFORE YOU MOVE ON

- Your reviewers can verify recommendations against the source records.
- Your team spends less time preparing and correcting the work, with no increase in material errors.

4 Task delegation

You delegate routine work within clear limits.

Your quotation team no longer prompts AI for every RFQ. You delegate preparation when an enquiry arrives and assign a reviewer for the result. Your coordinators handle exceptions instead of copying information between systems. You can increase throughput without adding the same amount of administration.

Work area	How your team works	What to do next
Quotations	Estimators review prepared quotations and handle technical exceptions.	Connect technical approval and capacity checks to the quotation process.
Pricing and contracts	Pricing managers delegate routine checks against contract terms.	Include changes in freight, product mix, and service costs in account reviews.
Order management	Coordinators supervise routine order entry and resolve exceptions.	Connect amendments to planning and commercial approvals.
Delivery commitments	Account managers review flagged delivery risks and contact planning.	Assess recovery options across affected customers and plants.
Claims and deductions	Claims handlers delegate evidence collection and review complete cases.	Connect quality decisions to credits and customer communication.
Account development	Account directors review regular briefings and changes in customer demand.	Include service performance and actual cost to serve in account plans.

YOUR PRIORITY

Delegate a complete task, including follow-up.

Define when to start and what counts as complete. Set approval limits. Assign a person to resolve failed cases, and check for duplicate transactions before allowing updates to your systems.

Measure: Cases completed per coordinator; exception backlog

BEFORE YOU MOVE ON

• Your team can supervise a routine queue without directing each step.

• Your process owner can see unfinished work and resolve failures without creating duplicate transactions.

5 Connected execution

You manage the consequences across departments.

Your commercial team cannot change delivery commitments in isolation. You need planners to check capacity and finance to confirm the cost. At this level, you delegate those checks and the follow-through together. You review the trade-off before making a customer commitment.

Work area	How your team works	What to do next
Quotations	Commercial owners approve quotations after the relevant teams confirm feasibility.	Use win/loss reasons and actual account costs in future quotation decisions.
Pricing and contracts	Commercial and finance teams review the cost of proposed changes together.	Agree how to initiate a review when account performance falls below plan.
Order management	Commercial owners coordinate approved changes across affected departments.	Delegate follow-up until the relevant teams confirm completion.
Delivery commitments	Commercial owners approve recovery plans with planning and logistics.	Delegate follow-through within agreed cost and commitment limits.
Claims and deductions	Account owners coordinate resolution with quality and finance.	Follow disputes through settlement and feed recurring causes into reviews.
Account development	Account directors plan growth with current capacity and account economics.	Delegate agreed follow-up and review the results before the next decision.

YOUR PRIORITY

Connect commercial decisions to operational consequences.

Map who needs to act when you change a commitment. Include the effects on other customers. After approval, follow through with the relevant teams until they confirm the changes.

Measure: On-time delivery; premium freight; account contribution margin

BEFORE YOU MOVE ON

- Your team considers capacity and account margin before approving a change.
- Your commercial owner can confirm that every affected team has acted on the agreed decision.

6 Autonomous operations

You set the direction. You approve the exceptions.

Your account directors start the day with decisions that need their judgment. They no longer chase every update or prompt every task. You delegate routine commercial work to agents with access to customer history. You retain control of pricing policy and customer commitments while your team focuses on the relationship.

Work area	How your team works	What to do next
Quotations	Commercial owners set quotation policy and review exceptions.	Review conversion and turnaround together before extending approval limits.
Pricing and contracts	Account directors review proposed actions against margin targets.	Check realized account margin after rebates, claims, and cost to serve.
Order management	Commercial managers supervise the order book through exceptions.	Review throughput and correction rates before extending delegation.
Delivery commitments	Commercial owners review exceptions to the delivery plan.	Track on-time delivery alongside premium freight and customer retention.
Claims and deductions	Account owners review material disputes and recurring quality issues.	Monitor resolution time and overdue disputed balances.
Account development	Account directors focus on relationships and approve commercial actions.	Track profitable growth and retention across the account portfolio.

YOUR PRIORITY

Run commercial operations with less manual coordination.

Set objectives and approval limits for each work area. Retain the customer history and reasons behind past decisions. Review actual commercial performance before you expand delegated authority.

Measure: Account contribution margin; cost to serve; retention

KEEP CONTROL

• You can inspect the work, change the limits, and intervene at any point.

• You can show better account economics or service performance after including review effort and AI running costs.

YOUR ASSESSMENT

Find your starting point.

For each work area, choose the highest level you can demonstrate in day-to-day operations. If you rely on a pilot or one expert, assess the normal process instead. Do not average the scores: choose one work area to improve first.

Quotations

LEVEL: ____

How does your team turn RFQs into firm quotations?

Pricing and contracts

LEVEL: ____

How do you protect account profitability?

Order management

LEVEL: ____

How much administration do you need to handle the order book?

Delivery commitments

LEVEL: ____

How do you keep customer promises across plants?

Claims and deductions

LEVEL: ____

How quickly do you resolve disputes and recover cash?

Account development

LEVEL: ____

How do you grow profitable customer relationships?

Choose one work area to improve first: ____

YOUR NEXT STEP

Choose your first improvement.

Start with a recurring constraint in one business unit. Agree the baseline with finance and the team who will do the work.

Commercial priority

Where do you need to improve performance?

For example: Reduce the quotation backlog without increasing sales administration headcount.

Current level and next level

What can your team delegate next?

For example: From AI assistance to task delegation in quotation preparation.

Dependencies

Who needs to contribute, and which records will you use?

For example: Agree technical checks with engineering. Use the current pricing rules and capacity records.

Owner and approval limits

Who will supervise the work and approve exceptions?

For example: The quotation manager approves customer offers. Engineering approves technical exceptions.

Baseline and review

How will you judge whether you improved performance?

For example: Compare total preparation and review time. Track quotation turnaround and material corrections.

THE COMMERCIAL REVIEW

Measure the business result.

Choose the measures for your priority. Agree definitions and a review period before you start.

Account contribution margin

Agree the calculation with finance. Review account profitability after rebates and claims. Include freight and the relevant cost to serve.

Quotation turnaround

Measure elapsed time from a complete RFQ to a firm quotation. Include the time your team waits for internal approvals.

First-time-right rate

Track the share of quotations or order entries your team completes without material corrections. Count the time reviewers spend checking AI output.

Commercial capacity

Measure completed work per coordinator or estimator. Include exception handling and AI running costs in your cost comparison.

Delivery performance

Agree the promise date with operations. Review on-time delivery and premium freight together, so you can see the cost of recovery.

CUSTOM AI AUDIT

Find where AI can help your team.

We'll review your commercial workflows with your team and identify where AI could make a measurable difference. You'll get a prioritized roadmap and a brief for your first deployment.

Free for qualified manufacturers.

Start with the work you want to improve.

On the first call, we'll discuss your priorities and confirm whether the audit fits your company. Together, we'll choose the workflows to review and agree what your team needs to share.

Show us how your team works today.

Walk us through real examples, from a customer enquiry to the steps your team takes next. We'll review the documents and systems involved, including where people wait for information or approval.

Decide where AI can help.

We'll assess which tasks an agent could handle, which decisions need a person, and what access the agent would need. We'll compare the likely value with the effort required to deploy it.

Get your roadmap and first-project brief.

We'll present our recommendations in priority order. For the first deployment, we'll outline the scope, the systems to connect, and how your team can measure the result.

Start with a call.

Explore the free AI audit at usebourne.com

The audit is free for qualified companies. We'll confirm fit and scope on the first call. Implementation is a separate engagement.