

SAMPLE DOCUMENT — FOR ILLUSTRATIVE PURPOSES ONLY

AI OPERATIONS ROADMAP

Horizon Professional Services LLC

Dubai, UAE | April 2026

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This document is a sanitised sample of an AI Operations Roadmap delivered as the output of the Gulf AI Operations Audit (AED 4,500 / 5 working days). Company name, personnel details, and specific process metrics have been anonymised. The methodology, scoring framework, and output structure are representative of an actual engagement.

SECTION 00 EXECUTIVE SUMMARY

This AI Operations Roadmap is the output of a structured 5-day process audit conducted with Horizon Professional Services LLC in April 2026. The audit mapped 11 recurring operational processes across the business, scored each on automation potential, quantified the annual cost of manual operations, and produced this prioritised implementation plan.

Processes Audited	Manual Hours / Week	Annual Cost Estimate	Payback on Standard
11 processes	62 hours/week	AED 198,000+	7–9 weeks

Three automation opportunities have been identified as the highest-value starting points. All three are buildable on no-code platforms (Make.com, WhatsApp Business API, HubSpot) without requiring custom software development or a technical team on the client side.

SECTION 01 BUSINESS SNAPSHOT

Company: Horizon Professional Services LLC

Structure: Free Zone Entity — DMCC, Dubai

Founded: 2018

Team Size: 18 full-time staff (Dubai + 2 KSA-based)

Revenue Stage: AED 8–12M annual revenue (growth stage)

Primary Services: B2B advisory, outsourced CFO, compliance consulting

Key Markets: UAE, KSA, and inbound GCC enquiries

Current Technology Stack

CRM: HubSpot (Sales Hub Starter — partial adoption)

Communication: WhatsApp Business (primary), Email (secondary)

Reporting: Google Sheets (manual compilation, weekly)

Documents: Google Docs / Microsoft Word (no template system)

Finance: Zoho Books

Task Management: WhatsApp group chats and individual notes

Operational Context

The business operates with a capable team but has grown faster than its operational infrastructure. Three separate WhatsApp groups are used for internal task coordination. Client onboarding involves 8–14 manual messages per engagement. HubSpot is used for contact storage but not for pipeline management or follow-up automation. Weekly reporting takes approximately 4 hours across two staff members to compile.

The operational overhead is concentrated in three clusters: client communication, data handling, and reporting. The audit findings confirm this and the automation priorities below reflect it.

SECTION 02 PROCESS AUDIT MATRIX

All 11 processes were mapped during the audit session. Each process was evaluated on four criteria: daily/weekly frequency, number of staff involved, error/rework frequency, and estimated manual hours. Automation potential scores reflect technical buildability, integration complexity, and commercial return.

Process	Freq.	Staff	Hrs/Wk	Error Rate	Auto. Score
Lead follow-up (WhatsApp)	Daily	3 staff	12 hrs	High — missed leads monthly	5/5 HIGH
Client onboarding messages	Per client	2 staff	8 hrs	Medium — wrong docs sent 2x/mo	5/5 HIGH
Weekly report compilation	Weekly	2 staff	4 hrs	Medium — late 30% of weeks	5/5 HIGH
CRM data entry (new contacts)	Daily	2 staff	5 hrs	Low — mostly missed entries	4/5 HIGH
Invoice reminders	Weekly	1 staff	3 hrs	High — overdue balances missed	4/5 HIGH
Proposal formatting	Per deal	2 staff	6 hrs	Medium — version control issues	3/5 MED
Meeting scheduling (external)	Daily	3 staff	4 hrs	Low	3/5 MED
Internal task assignment	Daily	4 staff	5 hrs	Medium — tasks fall through	3/5 MED
KSA team status updates	3x/week	3 staff	3 hrs	Medium — delays in reporting	2/5 LOW
Document filing & naming	Daily	2 staff	4 hrs	Low	2/5 LOW
Client satisfaction check-in	Monthly	1 staff	2 hrs	Low	2/5 LOW

Processes scoring 4/5 or 5/5 are recommended for immediate automation. Processes scoring 2–3/5 are candidates for phase two (post-launch optimisation) once core automations are stable.

SECTION 03 RANKED AUTOMATION OPPORTUNITIES

The following three opportunities are recommended as the build scope for the Standard engagement (AED 12,000 / 60 days). They represent the highest combined commercial return, the lowest implementation risk, and the fastest path to measurable results.

AUTOMATION 01 Lead Follow-Up & CRM Sync

Current State

3 staff members manually check WhatsApp, email, and HubSpot for new leads. Each lead receives a manual follow-up message written from scratch. Unqualified leads receive the same attention as qualified ones. Leads older than 48 hours frequently fall out of the pipeline without follow-up.

Annual Cost (Manual)

AED 72,000 — based on 12 hours/week at AED 115/hr average across 3 staff.

Automated State

Lead enters via WhatsApp, website form, or LinkedIn DM. Make.com routes to HubSpot automatically. Qualification score applied. Qualified leads receive a personalised first-response within 90 seconds. Follow-up sequence triggers at days 1, 3, and 7 if no response. Staff only touch leads that are qualified and engaged.

Estimated Annual Saving

AED 54,000–64,000 (75–89% of manual cost recovered). Additional upside: 15–25% improvement in response-to-meeting conversion rate.

Tools Required

Make.com, WhatsApp API, HubSpot

Build Time

12–15 working days

Monthly Tool Cost

AED 120–180/month

Build Complexity

Medium

AUTOMATION 02 Client Onboarding Workflow

Current State

New client engagements trigger 8–14 manual WhatsApp messages to request documents, confirm details, and send agreements. Two staff members are involved. Wrong documents are sent an average of twice per month, requiring correction and re-send. Onboarding takes 5–9 days end-to-end.

Annual Cost (Manual)

AED 48,000 — based on 8 hours/week across 2 staff at AED 115/hr.

Automated State

Deal marked "Won" in HubSpot triggers automated onboarding flow. Client receives a structured WhatsApp message with document checklist and upload link (Google Form). Automated reminders sent at 24hr and 48hr if incomplete. Internal team notified when all documents received. Onboarding compressed to 1–2 days.

Estimated Annual Saving

AED 36,000–42,000 (75–88% recovery). Secondary benefit: improved client first-impression score.

Tools Required

Make.com, HubSpot, WhatsApp API, Google Forms

Build Time

10–12 working days

Monthly Tool Cost

AED 80–120/month

Build Complexity

Low-Medium

AUTOMATION 03 Automated Reporting Dashboard

Current State

Two staff members spend 4 hours each week pulling data from HubSpot, Zoho Books, and individual WhatsApp updates to compile a weekly management report in Google Sheets. The report is late 30% of weeks. Data is sometimes inconsistent between systems.

Annual Cost (Manual)

AED 24,000 — based on 4 hours/week across 2 staff at AED 115/hr.

Automated State

Make.com scenario runs every Monday at 07:00. Pulls pipeline data from HubSpot, revenue data from Zoho, and status data from a simple Airtable tracker. Compiles into a pre-formatted Google Sheets report and sends a WhatsApp summary to the management group. Report is ready before the team starts work.

Estimated Annual Saving

AED 18,000–22,000 (75–92% recovery).
Time reclaimed: ~200 staff hours per year.

Tools Required

Make.com, HubSpot, Zoho Books, Airtable, Google Sheets

Build Time

8–10 working days

Monthly Tool Cost

AED 100–150/month

Build Complexity

Low

SECTION 04 ROI SUMMARY

Automation	Annual Manual Cost	Projected Annual Saving	Payback (vs AED 12k)
Lead Follow-Up & CRM Sync	AED 72,000	AED 54,000–64,000	–
Client Onboarding Workflow	AED 48,000	AED 36,000–42,000	–
Automated Reporting	AED 24,000	AED 18,000–22,000	–
TOTAL (3 automations)	AED 144,000	AED 108,000–128,000	7–9 weeks

Note: Savings figures represent 75–90% of the quantified manual cost, based on realistic automation coverage rates. They do not include secondary benefits: conversion rate improvement from faster lead response, client satisfaction improvement from onboarding consistency, or management decision quality improvement from real-time reporting.

SECTION 05 90-DAY BUILD PLAN (STANDARD PACKAGE)

The Standard engagement (AED 12,000) runs over 60 working days and builds all three automations. The plan below applies to this engagement specifically and reflects the process complexity identified in the audit.

Days	Phase	Activities
1–5	Audit & Planning	Detailed process documentation review. Tool account setup and API credential collection. HubSpot pipeline audit and field mapping. Data flow diagrams for all 3 automations. Client sign-off on build specifications.
6–25	Automation 01 — Lead Follow-Up	Make.com scenario build: WhatsApp webhook → HubSpot contact creation → qualification scoring → response sequence. Testing with 20 sample leads. Staff training session (1 hour). SOP documentation.
26–40	Automation 02 — Client Onboarding	HubSpot deal trigger → WhatsApp message sequence → Google Form document collection → internal notification. Integration testing across 5 real onboarding cases. SOP documentation.
41–55	Automation 03 — Reporting	Make.com weekly scenario: HubSpot data pull → Zoho Books connection → Airtable sync → Google Sheets population → WhatsApp summary. 4-week parallel run (automated + manual to verify accuracy). SOP documentation.
56–60	Handover & Training	Full system walkthrough with operations manager. Admin access configured. Monitoring alerts set up. 30-day post-launch support period begins. Final documentation package delivered.

SECTION 06 STACK RECOMMENDATION

The following stack is recommended for this engagement. All tools are available in the Gulf market, support Arabic-language WhatsApp messages, and are compatible with existing Horizon systems. Monthly cost estimates assume standard usage levels for an 18-person professional services firm.

Tool	Role	Plan	Est. AED/mo	Notes
Make.com	Primary automation platform	Core	AED 80–120	Handles all 3 automation scenarios. UAE-friendly support.
WhatsApp Business API	Client & internal messaging	Standard	AED 40–80	Via 360dialog or Meta direct. 1,000 free conversations/month.
HubSpot CRM	Lead & deal management	Starter (existing)	AED 0	Current plan is sufficient. No upgrade needed for this scope.
Google Workspace	Forms, Sheets, Drive	Business Starter (existing)	AED 0	Used for document collection and reporting layers.
Airtable	Internal status tracking	Free	AED 0	Lightweight database for reporting layer. Free tier is sufficient.
Zoho Books	Finance data source	Standard (existing)	AED 0	API connection read-only for reporting automation.
TOTAL MONTHLY COST			AED 120–200	All existing tools are retained and extended

SECTION 07 INVESTMENT & DECISION FRAMEWORK

Package Options

Package	Investment	Duration	What is Included
Audit Only	AED 4,500	5 days	This roadmap document. Process audit matrix. Full opportunity ranking with cost estimates. Stack recommendation. Build specifications. You implement with your team or a third party.
Standard	AED 12,000	60 days	Everything in Audit + Build and deployment of 3 automation systems + staff training + SOP documentation + 30 days post-launch support.
Complete	AED 22,000	90 days	Everything in Standard + advanced integrations (AI-assisted document processing, multilingual WhatsApp flows) + team training documentation + 60 days post-launch support + monthly optimisation session.

Recommendation for Horizon Professional Services LLC

Based on the audit findings, the Standard package (AED 12,000 / 60 days) is the recommended path. The three identified automations have a combined annual saving of AED 108,000–128,000 against an investment of AED 12,000 and monthly tool costs of AED 120–200. Payback is 7–9 weeks.

The Audit Only option is appropriate if you want to validate the build specifications with your internal team before committing, or if you plan to build with a different implementation partner using this roadmap.

The Complete package adds value if you have WhatsApp volume exceeding 1,000 conversations per month (which activates the AI-assisted routing layer) or if you need the KSA team integrated into the automation system with Arabic-language flows.

To proceed or ask questions about this roadmap:

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Capacity: Maximum 3 project clients per quarter. Current availability: April/May 2026.

This roadmap is the property of Anas El-Abrak and has been prepared specifically for Horizon Professional Services LLC. It may not be shared with third parties or used to brief competing implementation providers without prior written consent.