

• FREE SELF-ASSESSMENT

Operational *AI Audit*

A practical self-assessment of whether your business is ready to put AI agents on top of your ERP and CRM and automate the repetitive manual work.

48 checkpoints · 6 areas · ready to tick off

01	Process Map	Mapping cross-system manual work
02	Data Quality & Systems	Systems of record, master data, quality
03	Automation Candidates	Scoring and sorting the flows
04	Governance & Compliance	Guardrails, GDPR, GoBD, EU AI Act
05	Integration Readiness	APIs, access, EU hosting, testing
06	ROI & Pilot	Baseline, pilot, metrics, funding

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Are you ready for AI agents?

AI agents can take over cross-system manual work: transferring orders from PDFs into the ERP, turning emails into orders, reconciling invoices, chasing status across ERP, CRM, and DMS. Your ERP stays the system of record and the agents sit on top of it, with a human on the approvals. This checklist walks you through six areas and shows where your business is ready for that step and where groundwork is still needed. Work through each point, tick what is in place, and mark what still needs attention.

01

Work through it area by area

Six areas, from the process map to ROI and pilot, with 48 concrete points.

02

Tick what is in place

Only tick a point once it is demonstrably implemented.

03

Score it and act

Carry the totals to the assessment page and close the critical gaps first.

PRIORITY

CRITICAL

A precondition without which an agent cannot work safely.

IMPORTANT

Should be clarified or checked before the pilot.

RECOMMENDED

Raises the odds of success and overall maturity.

01 Process Map

Mapping cross-system manual work

8 POINTS

CAPTURE THE MANUAL FLOWS

- ☐ **Recurring cross-system manual work is named** **CRITICAL**
Retyping PDF orders, email to order, invoice reconciliation, quotes, status chasing across ERP, CRM, and DMS
- ☐ **Each flow is documented step by step** **IMPORTANT**
Trigger, systems involved, decisions, outcome
- ☐ **Each flow has a named owner** **IMPORTANT**
- ☐ **Media breaks are marked**
Points where data is moved by hand from one system into another

MEASURE AND PRIORITISE

- ☐ **Effort per flow is measured in hours per week, not estimated** **CRITICAL**
- ☐ **Error rate and rework per flow are recorded**
- ☐ **Load and seasonal peaks are known** **RECOMMENDED**
When the manual work ties up the most staff
- ☐ **The flows are roughly prioritised by effort and pain** **IMPORTANT**

02 Data Quality & Systems

Systems of record, master data, quality

8 POINTS

SYSTEM OF RECORD

- ☐ **The system of record is set per data object** **CRITICAL**
Customer, item, and document each live in exactly one system
- ☐ **A system inventory is in place** **IMPORTANT**
Dolibarr, BMD, SAP, and others in use, with version and owner
- ☐ **Master data is maintained centrally, not in parallel lists** **IMPORTANT**
No authoritative spreadsheets or mailboxes
- ☐ **Duplicate or conflicting records are known and being cleaned up**

DATA QUALITY

- ☐ **Structured and unstructured inputs are considered separately** **IMPORTANT**
API and EDI versus PDF, email, and scans
- ☐ **Mandatory fields and formats are defined per document type**
- ☐ **Historic records are stored in a way that can be queried** **RECOMMENDED**
Past decisions serve an agent as a reference
- ☐ **An access and permissions concept is documented per system**

03 Automation Candidates

Scoring and sorting the flows

8 POINTS

SCORING

- ☐ Each flow is scored by volume
How often it occurs per week **IMPORTANT**
- ☐ Each flow is scored by rule clarity
How unambiguously the decision follows fixed rules **CRITICAL**
- ☐ The cost per flow is quantified
Time times hourly rate, plus cost of errors and rework **IMPORTANT**
- ☐ A score per flow is derived from volume, rule clarity, and cost

SUITABILITY

- ☐ Flows with high rule clarity are marked agent-suitable **IMPORTANT**
- ☐ Flows with judgement or many exceptions are marked "human decides" **CRITICAL**
- ☐ A quick win is selected
High volume, clear rules, contained risk **IMPORTANT**
- ☐ The target state is described for each candidate **RECOMMENDED**

04 Governance & Compliance

Guardrails, GDPR, GoBD, EU AI Act

8 POINTS

DECISION LOGIC & ESCALATION

- ☐ For each agent, what it may and may not do is defined
A clear scope with boundaries **CRITICAL**
- ☐ Escalation thresholds are defined
When a human takes over, for example above an amount or on uncertainty **CRITICAL**
- ☐ The escalation paths are named
Who the agent hands a case to **IMPORTANT**
- ☐ Every agent action is logged
Audit trail: what, when, and on what basis **CRITICAL**

LAW & EVIDENCE

- ☐ GoBD immutability of accounting-relevant data is preserved **CRITICAL**
- ☐ The GDPR basis for the personal data processed is clarified **IMPORTANT**
- ☐ The application is classified into an EU AI Act risk class **IMPORTANT**
- ☐ The AI-literacy training duty is met
EU AI Act Art. 4, for everyone involved in the flow **RECOMMENDED**

05 Integration Readiness

APIs, access, EU hosting, testing

8 POINTS

INTERFACES & ACCESS

- ☐ **Stable interfaces to the core systems exist** **CRITICAL**
Dolibarr REST, BAPI or OData for SAP, documented endpoints
- ☐ **Webhooks or event triggers are available or can be added** **IMPORTANT**
- ☐ **Authentication and credentials are managed securely** **CRITICAL**
Secrets are not in plain text and can be rotated
- ☐ **Service accounts with least-privilege rights for the agent are set up** **IMPORTANT**

OPERATIONS & TESTING

- ☐ **Hosting and data processing take place in the EU** **CRITICAL**
Data residency clarified per service
- ☐ **A test or sandbox environment separate from production exists** **IMPORTANT**
- ☐ **Logging of interface calls is active**
- ☐ **An abort and rollback path for failed processing is defined** **IMPORTANT**

06 ROI & Pilot

Baseline, pilot, metrics, funding

8 POINTS

BASELINE & PILOT

- ☐ **The baseline is recorded** **CRITICAL**
Hours and error costs before automation as a point of comparison
- ☐ **A bounded pilot scope is set** **CRITICAL**
One flow, one team, one time window
- ☐ **The human stays in the flow** **CRITICAL**
Approval before booking or dispatch, human-in-the-loop
- ☐ **Abort criteria for the pilot are defined up front** **IMPORTANT**

SUCCESS & FUNDING

- ☐ **Success metrics are defined** **IMPORTANT**
Hours saved, cycle time, error rate
- ☐ **A date for reviewing the pilot is set**
- ☐ **Suitable funding routes are checked** **RECOMMENDED**
WKO, Wirtschaftsagentur Wien, and other digitalisation grants
- ☐ **The audit as a funding prerequisite is documented** **RECOMMENDED**
Many programmes require an as-is analysis as a basis

OVERALL ASSESSMENT

Overall assessment

Count the points you have in place per area and enter the result. The sum is your maturity for putting AI agents to work.

01	Process Map		/ 8
02	Data Quality & Systems		/ 8
03	Automation Candidates		/ 8
04	Governance & Compliance		/ 8
05	Integration Readiness		/ 8
06	ROI & Pilot		/ 8
Σ	Overall score		/ 48

WHAT YOUR SCORE MEANS

40-48	Ready to start	Your foundations are in place. A bounded pilot can begin shortly.
28-39	Nearly there	A good base with targeted groundwork needed in individual areas.
15-27	Patchy	Key preconditions are missing. Start with the points marked critical.
0-14	Foundations missing	Order your processes and data first. An Operational AI Audit brings clarity on the next steps.

• NEXT STEP

Ready to put AI agents on your systems?

You have marked the gaps. In the Operational AI Audit we work through them together. We capture your cross-system manual work, assess the candidates, and propose a bounded pilot. As an Austrian company we know GDPR, GoBD, and the EU AI Act from practice. Savings are client-specific and not guaranteed.

YOUR OPERATIONAL AI AUDIT INCLUDES

- ✓ A survey of your cross-system manual work
- ✓ An assessment of which flows suit agents
- ✓ Classification against GDPR, GoBD, and the EU AI Act
- ✓ A bounded pilot proposal with success metrics
- ✓ Pointers to suitable funding routes

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