FIELD GUIDE · NOVEMBER 2026

The Operations AI Field Guide

Where AI saves time in an operations office, and how to start without a tech team.

YASHA SYSTEMS · YASHASYSTEMS.AI

1 Who this guide is for

Operations leaders at companies that run on orders, documents, schedules and phone calls, and that don't have an in-house tech team.

If your team re-types the same data into two systems, chases paperwork by email, or builds the same report every Monday, the ideas here apply to you. You don't need to know how AI works to use this guide. You need to know your own work.

42%

of workers spend more than 10 hours a week on repetitive, manual tasks.

Smartsheet, automation in the workplace survey, 2017

42%

of a company's know-how is unique to the person in the role, not shared with coworkers.

Panopto, Workplace Knowledge and Productivity Report, 2018

That is the cost this guide is about: hours lost to the same tasks every week, and processes that only one person knows how to run.

2 Why AI projects stall

Trying an AI tool takes an afternoon. Getting one to change how a team works is a different job, and most attempts don't get there.

5%

of generative AI pilots produce measurable business value.

MIT NANDA, The GenAI Divide: State of AI in Business 2025

40%+

of agentic AI projects will be canceled by the end of 2027, because of rising costs, unclear business value or weak risk controls.

Gartner forecast, June 2025

The tool is rarely the problem. The projects that stall usually share four gaps:

- **No number.** Nobody wrote down what the work costs today, so nobody can tell whether it got better.
- **Not in the workflow.** The AI sits next to the real process, so people have to remember to use it.
- **No owner.** When something breaks or the process changes, nobody is responsible for fixing it.
- **Too big a start.** The first project tries to change everything instead of one job.

3 Pick your first workflow: a five-question scorecard

List the jobs your team does by hand. Score each one from 0 to 2 on the five questions below, then add up the score.

QUESTION	0	1	2
How often?	Monthly or less	Weekly	Daily
How many hours a week?	Under 2	2 to 10	Over 10
Could a new hire follow written steps?	No, it takes judgment	Mostly	Yes, one page of rules
Does the input arrive digitally?	Paper or phone only	Some of it	Email, PDF, portal or spreadsheet
Is there a number to watch?	No	We could measure one	We already track it

> **8 to 10:** start here. **5 to 7:** a good second project. **Under 5:** leave it for later. This is our rule of thumb, not a standard.

4 Ten workflows to automate first

These come up again and again in operations-heavy companies. For each one: the sign that you have it, and the number to watch.

01 Document intake

Sign: someone opens invoices, purchase orders or delivery paperwork and types the fields into your system.

Watch: hours of entry per week, and errors found later.

02 Order entry from email

Sign: orders arrive as emails or attachments and get re-typed.

Watch: time from the email to the order in the system.

03 Customer status updates

Sign: customers call or email to ask where their order is.

Watch: status calls and emails per week.

04 The weekly management report

Sign: someone spends Monday morning copying numbers into a spreadsheet.

Watch: hours to build it, and the day it arrives.

05 Invoice and order matching

Sign: accounting ticks invoices against orders by hand.

Watch: days to close the month, and mismatches found late.

06 Status calls to the field

Sign: a coordinator phones drivers, technicians or crews to ask how a job is going.

Watch: calls per coordinator per day.

07 Onboarding paperwork

Sign: forms for new employees, drivers or vendors are chased by email and copied into systems.

Watch: days from signed to ready to work.

08 Compliance and expiry dates

Sign: licenses, certificates and inspections live in a spreadsheet someone checks by hand.

Watch: items found expired.

09 Quotes and bids

Sign: new quotes are built by copying old ones and editing them.

Watch: time from request to quote sent.

10 After-hours and overflow calls

Sign: calls go to voicemail after closing or when everyone is busy.

Watch: missed calls per week. See our voice AI.

5 Hire, buy, outsource or subscribe

Once you know the workflow, there are four common ways to get it done. Each has a place.

OPTION	GOOD WHEN	WATCH OUT FOR
Hire a developer	You have years of work for them and can keep them.	Good engineers are hard to hire and keep at a company that isn't a tech company. When they leave, the know-how leaves too.
Hourly consultant or agency	You have one fixed project with a clear end.	Billed by the hour, so slow work pays them. Often nobody runs the result after handover.
Off-the-shelf software	One tool fits the job as it is.	Another login for the team. The work between your tools stays manual.
Monthly team subscription (what we do)	You have a steady stream of workflows to automate and keep running.	It still needs one owner on your side and a number for each workflow.

6 A 30-day plan

Week 1 · Pick

Choose and measure

Use the scorecard. Write down what the job costs today: hours, errors, days.

Week 2 · Build

First version

Build it on real examples from your team. A person checks every output.

Week 3 · Run

Side by side

Run it next to the old way. Fix every case where the two differ.

Week 4 · Decide

Keep, fix or stop

Compare with week 1. Keep what works, then pick the next workflow.

7 Ten questions to ask any AI vendor

1. Which number will this move, and how will we measure it?
2. Who maintains it after launch, and what does that cost?
3. What happens when the person who built it leaves?
4. Where does our data go, and is it used to train anyone's model?
5. How do we see what the AI did, and why?
6. What happens when the AI is unsure? Who reviews it?
7. Which of our systems does it connect to, and with what access?
8. Can we switch it off without breaking the workflow?
9. Who owns the code, the prompts and the configuration?
10. Can we start with one workflow before we commit to more?

NEXT STEP

Pick the one job your office does most by hand.

In 20 minutes, we show you how we would take it over and which number it moves. Yasha Systems builds and runs AI automations for operations teams without a tech team.

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8 Sources

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- MIT NANDA, *The GenAI Divide: State of AI in Business 2025* (July 2025). A small-sample study; read it as a direction, not a precise market figure.
- Gartner, “Gartner Predicts Over 40% of Agentic AI Projects Will Be Canceled by End of 2027”, press release, 25 June 2025. gartner.com