ORLYNTH
TECHNOLOGIES

AI ADVISORY · SAMPLE ASSESSMENT REPORT

AI Feasibility & Implementation Report

Prepared for Cedar Ridge Home Services

Sample report for a fictional client: AI call answering and booking for a home-services company

DATE	VERSION	PREPARED BY	CLASSIFICATION
October 21, 2026	1.0 · Final	Orlynth Technologies	Confidential

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How to read this report

This is a sample report for a fictional client: all names, data and figures are illustrative. Page 3 has the decision in one page. Sections 2–11 show the evidence behind it. Sections 12–13 set out the options and what happens next.

Document control

Lead consultant: Senior AI Consultant, Orlynth

Reviewed by: Engagement Director, Orlynth

Client sponsor: Dana Whitfield, General Manager

Issued: October 21, 2026 · v1.0

01 · EXECUTIVE SUMMARY

The decision in one page

OUR VERDICT **Go** Options: Go · Go with conditions · Not recommended yet

BUILD COST	RUNNING COST	ANNUAL BENEFIT	PAYBACK	TIME TO LAUNCH
$12,700	**$650**	**$86,300**	**1.9 mo**	**8 wks**
after $1,800 credit	per month	expected case	expected case	from kick-off

The problem

Cedar Ridge answers every call with three customer-service reps. About 430 calls a month go unanswered after hours and at peak times, and booking takes about 150 staff hours a month. Missed calls cost roughly $109,000 a year in lost gross profit, and reps spend their day re-keying jobs.

What we recommend

Build Cedar Ridge Call Assistant, an AI voice system that answers missed and after-hours calls, books jobs and texts confirmations. It plugs into the company's field-service software and phone system and keeps a dispatcher in control of emergency and complex jobs.

Why we reached this verdict

- **Value:** recovers ~40 bookings a month and frees ~80 staff hours, worth ~$86,000 a year net
- **Feasibility:** 6 months of clean call and job data, and both core systems have documented APIs
- **Risk:** callers who prefer a person, contained by instant transfer to a CSR and a phased rollout

Conditions for success

- API access to the field-service software and phone system
- One internal owner (operations manager), about 2 hours a week

Next step

Approve the build by November 7, 2026 to start on November 16 and go live by January 15, 2027. The $1,800 assessment fee is credited in full against the build if approved by January 19, 2027.

02 · SCOPE & APPROACH

What we looked at, and how

This assessment answers one question: **should Cedar Ridge use AI to improve how it answers calls and books jobs, and if so, how?** Every figure in this report traces back to the interviews and data listed below.

Our method

STEP 1
Discover
Interviews with the people who run the process today.

STEP 2
Measure
Baseline volumes, time spent and cost from your own data.

STEP 3
Assess
Score each AI opportunity on value, feasibility and risk.

STEP 4
Recommend
Design the solution, cost it and plan the rollout.

People we interviewed

NAME	ROLE	DATE
Dana Whitfield	General Manager	Sep 29, 2026
Jordan Ellis	Operations Manager	Sep 30, 2026
Priya Nair	Lead Customer Service Rep	Oct 1, 2026

Data we reviewed

SOURCE	PERIOD	VOLUME
Phone system call logs	Apr–Sep 2026	14,600 calls
Field-service job export	Apr–Sep 2026	5,200 jobs
Call scripts and price sheets	Current	12 documents

In scope
- Inbound calls, booking and confirmations
- Phone, field-service and SMS tools

Out of scope
- Dispatch routing and technician scheduling
- Accounting and payroll systems

Limitations. Estimates use data provided by Cedar Ridge and are stated as ranges where uncertainty is material. Comments on regulation are for planning purposes and are not legal advice.

03 · CURRENT SITUATION

How the work gets done today

Cedar Ridge Home Services is a 45-person HVAC and plumbing company based in Richmond, Virginia, serving about 9,000 households.

Process map

STEP 1 →
Answer the call
Owner: CSR
Tool: Phone system
Time: 3 min

STEP 2 →
Qualify the job
Owner: CSR
Tool: Call script
Time: 4 min

STEP 3 · BOTTLENECK
Book into schedule
Owner: CSR
Tool: Field-service app
Time: 6 min

STEP 4 →
Confirm by text
Owner: CSR
Tool: Manual SMS
Time: 2 min

Where time and money are lost

PAIN POINT	MEASURED IMPACT	ANNUAL COST	SOURCE
Missed calls after hours and at peak	~430 calls/month	$109,200	Call logs; GM interview
Manual booking and re-keying	~150 hrs/month	$50,400	Job export; ops manager
Manual confirmation texts	~40 hrs/month	$13,440	Interview, lead CSR
Total	**~190 hrs/month**	**$173,040**	

What we heard

> "On a hot July Saturday we miss more calls than we answer, and every one of them is a job for a competitor."
>
> — Dana Whitfield, General Manager

Systems in use

Cloud phone system · Field-service software · Google Workspace · Spreadsheets · SMS tool

Calls, jobs and texts live in separate tools. CSRs re-key customer details from the phone into the field-service software, then again into the SMS tool.

04 · AI OPPORTUNITY MAP

Where AI can help, ranked

We identified 4 ways AI could help Cedar Ridge. Each is placed by expected business impact and the effort to build it. The first build should come from the **Quick wins** quadrant.

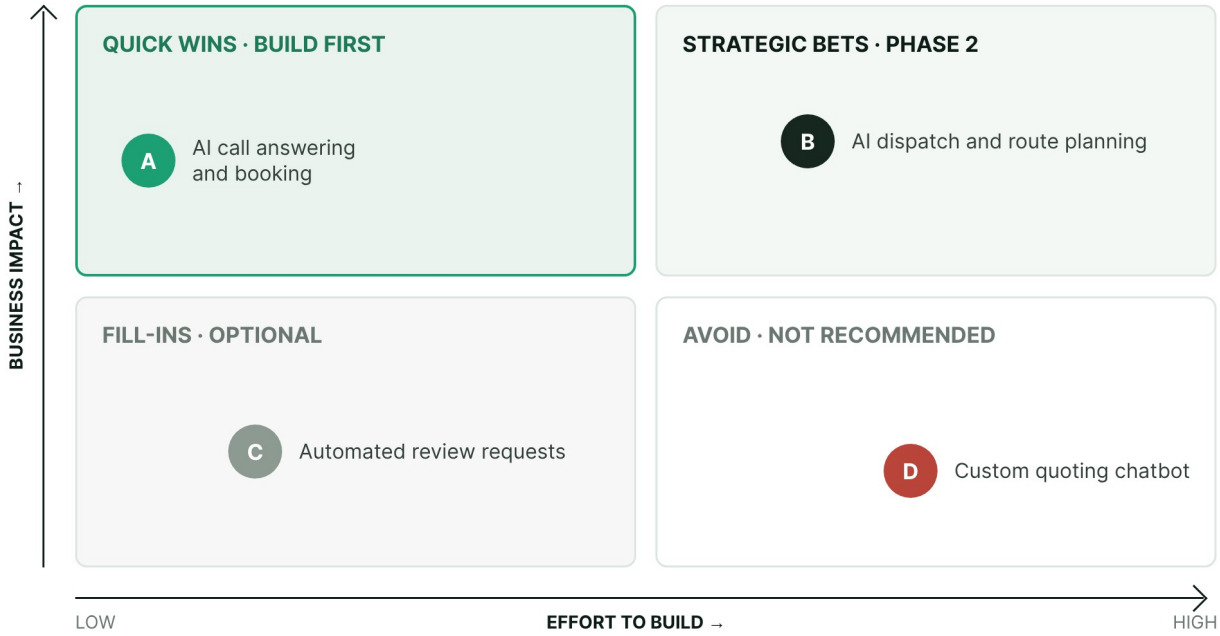


Diagram: the four use cases from the table below.

	USE CASE	IMPACT	EFFORT	EST. ANNUAL VALUE	RECOMMENDATION
A	AI call answering and booking	High	Low	$86,000	**Build first**
B	AI dispatch and route planning	High	High	$40,000	Phase 2
C	Automated review requests	Low	Low	$6,000	Optional add-on
D	Custom quoting chatbot	Low	High	$3,000	Not recommended

05 · FEASIBILITY ASSESSMENT

Can it be done reliably?

We tested the recommended use case against six criteria. A low score on any one of them is a reason to pause, regardless of the ROI.

AREA	RATING	FINDING	WHAT'S NEEDED
Technical	High	Voice AI handles booking calls reliably with a scripted flow and handoff	None
Data readiness	Medium	6 months of calls and jobs; 8% of jobs lack a service type	Clean service types on ~400 records
Integration	High	Phone system and field-service software both have documented APIs	API keys for both systems
Adoption	Medium	CSR team supportive; operations manager will own it	2-hour team training
Commercial	High	Expected payback in under 2 months	See section 08
Compliance	Medium	TCPA rules for automated texts; call-recording consent and AI disclosure	Consent wording; vendor data agreements

High Medium Low

Data review summary

We reviewed 14,600 call records and 5,200 jobs provided on October 2, 2026. Data quality is good: 92% of jobs have a clear service type and outcome. The gaps are small and are fixed in week 1.

OVERALL FEASIBILITY

High

because proven voice AI, clean data and open APIs cover every step.

06 · RECOMMENDED SOLUTION & ARCHITECTURE

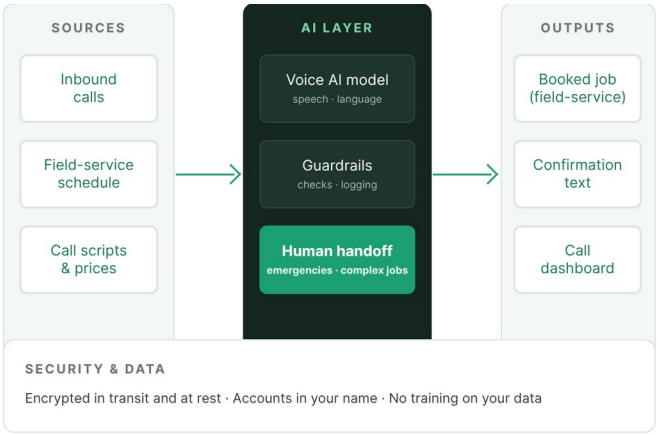
Cedar Ridge Call Assistant

An AI voice assistant that answers missed calls and books jobs, so no caller reaches voicemail.

How it works for your team

1. A customer calls; if no CSR answers within 3 rings, the AI picks up
2. The AI qualifies the job, checks availability and books a slot
3. Emergencies and complex jobs transfer instantly to the on-call dispatcher
4. The job and a call summary are logged, and a confirmation text goes out

Architecture



How a call becomes a booked job.

Integrations

SYSTEM	WHAT CONNECTS	METHOD
Field-service software	Customers, jobs, availability	REST API
Cloud phone system	Call routing, recordings	Webhooks + SIP

Version 1 (this build)

- AI call answering with booking
- Confirmation and reminder texts

Later phases

- Dispatch and route planning
- Automated review requests

07 · TECHNOLOGY STACK & RUNNING COSTS

What it runs on, and what it costs to run

Each component was chosen for accuracy, cost and privacy terms. Where a credible alternative exists, we list it so you are never locked in.

LAYER	RECOMMENDED	WHY	ALTERNATIVE	MONTHLY
AI model	Voice AI platform + LLM (enterprise tier)	Natural voice; no training on your data	Second voice platform	$420
Backend	Node.js API	Fast to build and maintain	Python FastAPI	$40
Data storage	PostgreSQL	Reliable, standard tooling	Managed cloud datastore	$30
Hosting	AWS	Your account; mature security	Azure	$60
Interface	Phone + SMS	Customers use what they already use	Web chat widget	$70
Monitoring	CloudWatch + call review dashboard	Errors, costs and call quality	Datadog	$30
Total				**$650/mo**

VOLUME ASSUMPTION

Costs assume about 4,000 AI-handled call minutes a month. At 2× volume, running costs rise to about $1,100/month.

OWNERSHIP

All accounts, code and data are set up in Cedar Ridge's name. You can take the system in-house or to another vendor at any time.

DATA HANDLING

Provider terms prohibit training on your data. Access is role-based, and every AI action is logged for audit.

08 · INVESTMENT & ROI

What it costs, and what it returns

One-time investment

ITEM	COST
Build (Orlynth fixed quote)	$14,500
Less assessment credit	−$1,800
Client-side setup (accounts, data cleanup)	$800
Total one-time	**$13,500**

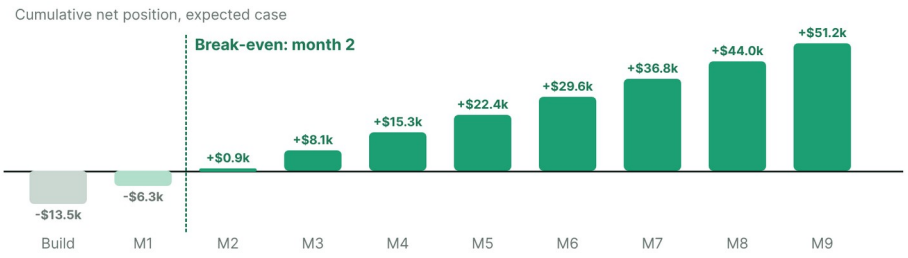
Annual impact by scenario

	CONSERVATIVE	EXPECTED	OPTIMISTIC
Hours saved per month	50	80	100
Value of time saved	$16,800	$26,880	$33,600
Added revenue	$33,600	$67,200	$100,800
Running costs	−$7,200	−$7,800	−$8,400
Net annual benefit	**$43,200**	**$86,280**	**$126,000**
Payback period	3.8 mo	1.9 mo	1.3 mo
3-year ROI	860%	1,817%	2,700%

How we calculated this

Hours saved × loaded hourly cost of $28, plus recovered revenue at an average gross profit of $140 per booked job ($350 at a 40% margin), using figures provided by Cedar Ridge on October 2, 2026. Full workings in Appendix C.

Payback, expected case



09 · SUCCESS METRICS

How we will prove it worked

We agree the targets before we build. Each one is measured against the baseline captured during this assessment, and reported to you monthly.

METRIC	BASELINE TODAY	TARGET AT 90 DAYS	HOW MEASURED	OWNER
Calls answered, incl. after hours	82%	≥ 98%	Phone system report	Ops manager
Hours of manual booking / month	150	70	Time log sample	Ops manager
Missed-call bookings recovered	0	40 / month	Job source in field-service app	General manager
AI booking accuracy on reviewed calls	–	≥ 95%	Weekly sample review	Orlynth
CSR satisfaction	3.1/5	4/5	Short survey	Ops manager

Review cadence

WEEKLY · FIRST 30 DAYS

Accuracy review of sampled outputs. Fixes shipped the same week.

MONTHLY

One-page performance report against each target, with running costs.

DAY 90

Results review: confirm ROI, agree optimizations and decide on phase 2.

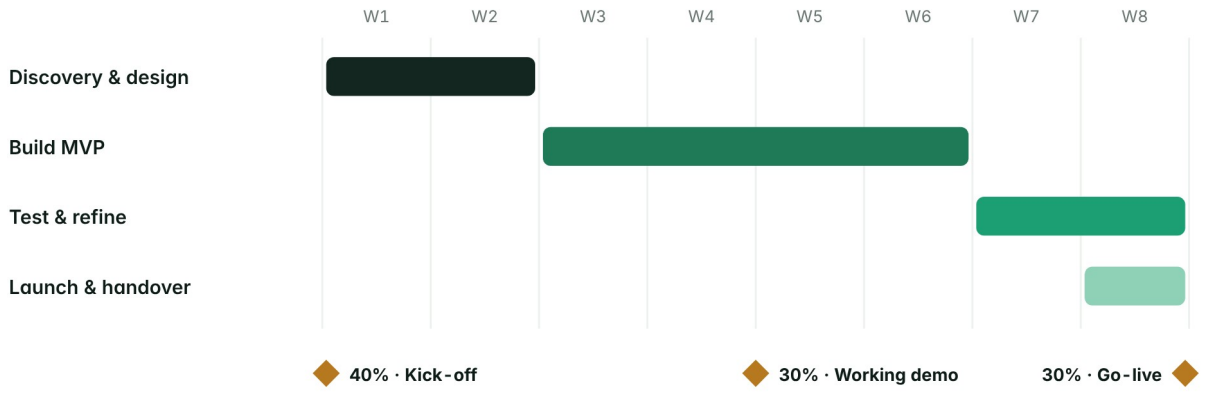
If a target is missed

We diagnose the cause within five business days and propose a fix at no extra cost when it falls within the agreed scope.

10 · TIMELINE & MILESTONES

Live in 8 weeks

Each payment is tied to something you can see: kick-off, a working demo and go-live.



PHASE	WEEKS	DELIVERABLES	YOUR TEAM'S INVOLVEMENT
Discovery & design	1–2	Detailed spec, call flows, API access set up	Provide access; approve call script
Build MVP	3–6	Working assistant connected to phone and field-service software	Join demo; give feedback
Test & refine	7–8	Accuracy report on 300 test calls, fixes	2–3 CSRs test it
Launch & handover	End of 8	Live system, training, documentation	Sign off go-live

After go-live: 30 days of included hypercare, then an optional support and optimization plan from $500/month.

11 · RISKS & MITIGATION

What could go wrong, and how we prevent it

RISK	LIKELIHOOD	IMPACT	HOW WE ADDRESS IT
AI accuracy below target	Medium	High	Human review for low-confidence outputs; accuracy testing on your data before launch
Data privacy and security	Low	High	Data stays in your cloud accounts; no-training provider terms; role-based access and audit logs
Regulatory compliance	Low	High	TCPA rules for texts, call-recording consent; AI disclosure built in
Staff adoption	Medium	Medium	Training, an internal champion and a phased rollout
Vendor price or model changes	Medium	Medium	Model-agnostic design; switch provider without a rebuild
Running costs above plan	Low	Medium	Usage caps and monthly cost alerts
Callers prefer a person	Medium	Medium	Instant transfer to a CSR; AI first answers only overflow and after-hours calls

Ratings reflect Cedar Ridge's data, systems and team.

Responsible AI commitments

- People always know when they are dealing with AI
- A human can override or take over at any point
- Every AI decision is logged and can be reviewed
- Your data is never used to train third-party models

12 · OPTIONS & RECOMMENDATION

Your options, side by side

We compared every realistic path, including ones that don't involve us.

	BUILD WITH ORLYNTH	BUY OFF-THE-SHELF	BUILD IN-HOUSE	DO NOTHING
Upfront cost	$12,700 after $1,800 credit	$2,000 setup	$110,000+/yr salary	$0
Monthly cost	$650 running + optional plan	$900 per month	$650 + staff time	Ongoing loss of $109,000/yr
Time to launch	8 weeks	2–4 weeks	6–9 months incl. hiring	–
Fit to your process	Built around your workflow and systems	Partial: you adapt to the tool	Full, if skills are available	–
Ownership	You own code, accounts and data	Vendor owns the platform	You own everything	–
Main risk	Fixed scope and milestone payments limit it	Gaps in booking rules; lock-in	Skills, hiring and ramp-up	Competitors move first

OUR RECOMMENDATION

Build with Orlynth

because it pays back in under 2 months in the expected case and fits Cedar Ridge's booking rules and systems, which off-the-shelf tools only partly cover.

Commercial terms

PRICE

Fixed price of $14,500. The $1,800 assessment fee is credited in full.

PAYMENTS

40% at kick-off, 30% at the working demo, 30% at go-live.

VALIDITY

Quote and credit valid until January 19, 2027.

13 · NEXT STEPS & APPROVAL

Getting started

- [ ] **Review this report** and note questions for the walkthrough call on October 28, 2026
- [ ] **Approve the build** by November 7, 2026 by signing below
- [ ] **Assign an internal owner** (about 2 hours a week during the build)
- [ ] **Provide access and data** listed in Appendix E
- [ ] **Kick-off meeting** on November 16, 2026

Approval to proceed

By signing, Cedar Ridge Home Services approves the recommended option, the fixed price of $14,500 and the payment schedule in section 12. A statement of work with full terms will follow for signature.

FOR CEDAR RIDGE HOME SERVICES	FOR ORLYNTH TECHNOLOGIES
Signature	Signature
Name & title	Name & title
Date	Date

Questions?

Contact your Orlynth consultant at info@orlynth.com or +1 (202) 725-2630.

APPENDIX

Supporting detail

The appendices hold the evidence behind every number in this report. They follow this page.

APPENDIX		CONTENTS
A	Technical specification	Detailed architecture, data flows, API endpoints and security setup
B	Data reviewed	Files and records received, with dates and a quality summary
C	Assumptions & workings	Every number in sections 7 and 8, and where it came from
D	Discovery notes	Who we interviewed, when, and key points
E	Access & data checklist	What your team provides before kick-off
F	Glossary	Plain-English definitions of technical terms

Appendix E · Access & data checklist

	ITEM	PROVIDED BY	NEEDED BY
☐	Admin access to field-service software and phone system	Jordan Ellis	Kick-off
☐	Data export: 6 months of calls and jobs	Jordan Ellis	Week 1
☐	Current scripts, FAQs and policies	Priya Nair	Week 1
☐	Signed data processing agreement	Dana Whitfield	Before data transfer
☐	2–3 staff available for testing	Priya Nair	Week 7

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From AI ideas to working business systems.

Orlynth Technologies is an AI advisory and engineering firm based in Virginia. We help growing businesses find where AI pays off, then build and run the systems that deliver it.

STRATEGY + EXECUTION
We find the right problem, then build and run the solution.

FIXED SCOPE
Fixed prices and payments tied to visible milestones.

YOU OWN IT
Code, accounts and data stay in your name.

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