



CONFIDENTIAL · PREPARED FOR THE CLIENT NAMED BELOW

AI STRATEGY & OPERATIONS AUDIT

CareBridge Home Services

Findings, recoverable costs and AI transformation blueprint.

INDUSTRY

home-services

AUDIT PERIOD

2026-02-15 to 31 August 2026

01 Contents

ORIENTATION

02	Executive summary	3
03	The AI moment	4
04	Your audit journey	5

CORE DELIVERABLE 1 · HOW YOU WORK

05	How you work today, the value chain	6
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CORE DELIVERABLE 2 · WHAT WE FOUND

06	What we discussed, findings	7
----	-----------------------------	---

CORE DELIVERABLE 3 · HIDDEN COSTS

07	Recoverable cost	18
----	------------------	----

CORE DELIVERABLE 4 · YOUR AI BLUEPRINT

08	Your AI blueprint, the opportunity	24
09	How your business systems work	25
10	Five types of solution	26
11	Your opportunities, the initiatives	27
12	The roadmap	37

REFERENCE

13	Appendix, where the full detail lives	39
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HOW TO READ THE BADGES

CITED

The figure was stated by your team in a recorded session or taken from a document you supplied.

ESTIMATED

Modelled by us from cited inputs. Conservative, and never counted as measured.

5

business stages mapped, end to end

33

findings recorded: 22 pain points, 11 optimisations

\$483,184

CITED

annual recoverable cost, traced to session recordings

\$1,453,184

ESTIMATED

total quantified annual opportunity

Across 5 stages we recorded 33 findings with your team. 22 of them are things your own people raised as painful. The recoverable cost of \$483,184 per year is not a projection: it is hours your staff described spending, at a blended rate, over 46 working weeks, with an 80% haircut applied.

The largest single item is Daily scheduling and rostering – Sarah spends 2.5 hours every morning manually rebuilding schedules, checking availability, and filling gaps, at \$143,520 per year.

This report is the print edition of your interactive audit portal. Diagrams are simplified for print; the interactive process maps and the technical appendix live in the portal.

Any process done on a computer will be 40 to 80% quicker in the next two years.

THE EXCEL ANALOGY

Before spreadsheets, a bookkeeper recalculated a whole column by hand every time one number changed. Excel did not replace bookkeepers. It removed the recalculating, and the same person then handled ten times the volume. AI is at that point for judgement work: reading a drawing set, drafting a variation, checking a supplier invoice against a purchase order. The person stays. The grind goes.

Amplification, not replacement

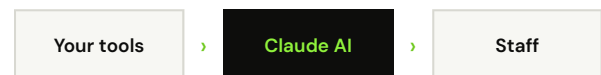
The same team, doing more of the work only they can do.



Output per person, not headcount. Nobody in this audit is being automated out of a job.

What a plugin actually is

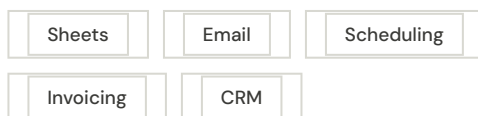
Not a new system to log into. A layer over the tools you already pay for.



Your estimator asks a question in plain English. The plugin reads the live data, does the work, and hands back a draft they check and send.

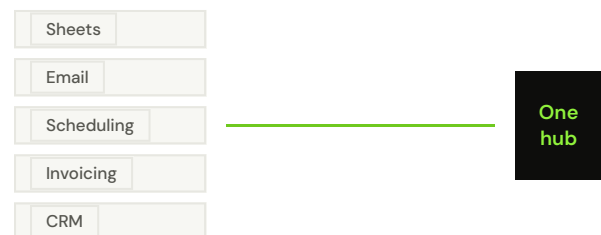
From data silos to a hub

BEFORE



Five tools that do not talk. A person is the integration, copying between them.

AFTER



The tools stay. The copying stops, because one layer reads all of them.

SESSION 1

2026-02-15

Session 1, Initial Discovery

Covered the business overview, current tech stack, acquisition pipeline, and daily scheduling pain points. Identified Google Sheets as the central bottleneck across operations.

Acquisition

Fulfilment

SESSION 2

2026-02-22

Session 2, Acquisition & Onboarding

Mapped the full lead-to-client journey with Tom, including the paper-based onboarding process, lead response delays, and data duplication across Trello, Sheets, and Drive.

Acquisition

Onboarding

SESSION 3

2026-03-01

Session 3, Operations Deep-Dive

Deep-dive into fulfilment, payroll, and retention with Priya joining. Uncovered major time sinks in fortnightly payroll, manual km calculations, and quarterly reporting.

Fulfilment

Retention

Payroll Invoicing

SESSION 4

2026-03-08

Session 4, Review & Validation

Full team session to walk through all identified waste, validate savings figures, and confirm priorities. Captured remaining data on salaries, funding sources, and transport overhead.

Fulfilment

Retention

Payroll Invoicing

05 How you work today, the value chain

LO

5 stages, in the order work moves through your business. This is your description, not a template: the names below are the ones your team used in the sessions.

5 stages	5 processes	71 steps	22 pain points across them
01	Acquisition		15 steps
02	Onboarding		13 steps
03	Fulfilment		22 steps
04	Retention		11 steps
05	Payroll & Invoicing		10 steps

Pain counters are the number of findings your team raised inside that stage, not a severity score. The findings section lists every one of them with the quote it came from.

These are the pain points you raised and the optimisation ideas we explored together. This is not our proposed solution; that comes next.

Unknown 33 findings

PAIN POINT	PP-001	LOW
PAIN POINT	PP-002	LOW
PAIN POINT	PP-003	LOW

PAIN POINT	PP-004	LOW
PAIN POINT	PP-005	LOW
PAIN POINT	PP-006	LOW

PAIN POINT	PP-007	LOW
PAIN POINT	PP-008	LOW
PAIN POINT	PP-009	LOW

PAIN POINT	PP-010	LOW
PAIN POINT	PP-011	LOW
PAIN POINT	PP-012	LOW

PAIN POINT PP-013	LOW
PAIN POINT PP-014	LOW
PAIN POINT PP-015	LOW

PAIN POINT	PP-016	LOW
PAIN POINT	PP-017	LOW
PAIN POINT	PP-018	LOW

PAIN POINT	PP-019	LOW
PAIN POINT	PP-020	LOW
PAIN POINT	PP-021	LOW

PAIN POINT PP-022	LOW
OPTIMISATION	LOW
OPTIMISATION	LOW

OPTIMISATION	LOW
OPTIMISATION	LOW
OPTIMISATION	LOW

OPTIMISATION	LOW
OPTIMISATION	LOW
OPTIMISATION	LOW

OPTIMISATION	LOW
OPTIMISATION	LOW
OPTIMISATION	LOW

PART 07

Recoverable cost

What the current way of working costs you every year, item by item, with the arithmetic shown. This is the section the guarantee is measured against.

PORTAL · RECOVERABLE COST

11 ITEMS

11 CITED

\$483,184

CITED

current annual recoverable cost

VALUATION BASIS

This is not an hourly wage conversion or a guaranteed result.

Recoverable cost is the value of time currently spent on work that should not need a person. It becomes a saving only when the process actually stops. Every item uses a blended labour rate over 46 working weeks with one 80% recoverable haircut, unless the item says otherwise.

The item register

11 items, sorted by annual cost descending. Items without a defensible figure say "needs quantification" rather than showing a guess.

RC-001

Missing Automation

LOW

Daily scheduling and rostering - Sarah spends 2.5 hours every morning manually rebuilding schedules, checking availability, and filling gaps

ANNUAL COST

\$143,520 ESTIMATED

TIME INVOLVED

**12 hrs/
wk** ESTIMATED

12 hrs/wk × 5 people × \$65/hr × 46 working weeks × 80% recoverability

"Two to three hours every morning, just on scheduling. I'm up before anyone else just to get the day sorted."

SESSION 1 · 15:30

RC-006

Manual Data Entry

LOW

Quarterly reporting for case managers - searching through WhatsApp messages and scattered notes to compile progress reports

ANNUAL COST

\$95,680 ESTIMATED

TIME INVOLVED

**8 hrs/
wk** ESTIMATED

8 hrs/wk × 5 people × \$65/hr × 46 working weeks × 80% recoverability

"Each report takes me at least two hours because I'm going back through months of WhatsApp messages."

SESSION 3 · 42:10

RC-003

Communication Gap

LOW

Searching for client and contact info across three disconnected systems - Trello, Drive, and Google Sheets

ANNUAL COST

\$64,584 ESTIMATED

TIME INVOLVED

**3 hrs/
wk** ESTIMATED

3 hrs/wk × 9 people × \$65/hr × 46 working weeks × 80% recoverability

"When I need a client's phone number or their carer's details, I'm opening three different systems trying to find it."

SESSION 3 · 32:30

RC-007

Duplicate Work

LOW

Double-handling onboarding paperwork - paper forms signed, scanned, then manually re-entered into Trello and spreadsheet

ANNUAL COST

\$59,800

ESTIMATED

TIME INVOLVED

**5 hrs/
wk**

ESTIMATED

5 hrs/wk × 5 people × \$65/hr × 46 working weeks × 80% recoverability

"It's all paper. Print it, sign it, scan it, type it in. There's so much double handling."

SESSION 2 · 31:40

RC-002

Missing Automation

LOW

WhatsApp run sheet formatting - daily copy-paste from spreadsheet, reformat for mobile, send individually to each worker

ANNUAL COST

\$47,840

ESTIMATED

TIME INVOLVED

**4 hrs/
wk**

ESTIMATED

4 hrs/wk × 5 people × \$65/hr × 46 working weeks × 80% recoverability

"I copy from the spreadsheet, format it nice so they can read it, then send it through WhatsApp to each worker."

SESSION 1 · 19:10

RC-004

Manual Data Entry

LOW

Google Maps km calculation for payroll - manual input of origin/destination for every worker every pay cycle

ANNUAL COST

\$43,056

ESTIMATED

TIME INVOLVED

**6 hrs/
wk**

ESTIMATED

6 hrs/wk × 3 people × \$65/hr × 46 working weeks × 80% recoverability

"I have to punch in every single address, every single time. There's no way around it."

SESSION 3 · 35:00

RC-005

Duplicate Work

LOW

Payroll verification and processing - Priya's 8-hour fortnightly cycle cross-checking timesheets, spreadsheets, and WhatsApp photos

ANNUAL COST

\$28,704

ESTIMATED

TIME INVOLVED

**4 hrs/
wk**

ESTIMATED

4 hrs/wk × 3 people × \$65/hr × 46 working weeks × 80% recoverability

"I have to go line by line, checking the timesheet against the spreadsheet against the WhatsApp check-in photos."

SESSION 3 · 47:50

RC-008

Missing Automation

LOW

Airtable subscription unused - \$240/year for a CRM tool that's barely configured and not trusted

ANNUAL COST

Needs quantification

Awaiting complete cited hours, headcount and approved hourly-rate inputs.

"We're paying for Airtable but it's basically sitting there empty."

SESSION 1 · 25:00

RC-009

No Follow-Up

LOW

Lost leads from slow response - estimated 1-2 clients per month lost against a demonstration average annual client service value of \$60,000

ANNUAL COST

Needs quantification

Awaiting complete cited hours, headcount and approved hourly-rate inputs.

"We probably lose one or two a month because they've already gone somewhere else by the time we call back."

SESSION 2 · 7:40

RC-010

No Follow-Up

LOW

Funding overruns and missed plan renewals - estimated revenue leakage from untracked funding exhaustion and expired plans

ANNUAL COST

Needs quantification

Awaiting complete cited hours, headcount and approved hourly-rate inputs.

"We've been caught out a few times where the funding ran out and we kept going for weeks without realising."

SESSION 3 · 44:10

RC-011

Missing Automation

LOW

SignNow subscription underutilised - \$180/year for e-signatures used on only 30% of onboardings

ANNUAL COST

Needs quantification

Awaiting complete cited hours, headcount and approved hourly-rate inputs.

"We've got the digital signing tool but Tom still prints everything. We're paying for it and barely using it."

SESSION 2 · 41:20

THIS IS WHAT WE ARE SOLVING

\$1,453,184 ESTIMATED

total quantified annual opportunity · 11 of 11 items cited

\$483,184

recoverable cost

9

initiatives in the blueprint

09 How your business systems work

LAYER 3 · AI Reads and writes across the layers below. Drafts, checks, summarises. Never the system of record.

LAYER 2 · SYSTEMS The tools your team logs into. Sheets, Xero, the job system, Outlook, SharePoint.

LAYER 1 · DATA Jobs, quotes, drawings, invoices, people. The facts the business runs on.

Your current tools (Layer 2)

Connection method decides what a plugin can reach without anyone re-typing.

Google Sheets

Google Calendar

Google Drive

Google Maps

WhatsApp

Trello

Xero

Airtable

SignNow

Seek

Canva

How a Cowork Plugin connects everything

Your data

Sheets · Xero · job system

Connector

Read and write, permissioned

Plugin

Does the task, shows working

Your staff

Check, adjust, send

10 Five types of solution

SAME FOR EVERY CLIENT

Every initiative in section 12 is one of these five. The type sets the shape of the work, the build time and the way it is priced.

Cowork Plugin

Staff-facing

4 to 8 weeks

A person asks, the plugin does the work against your live data and hands back a draft. Used in the moment, beside the tools they already have open.

Automation

Background

2 to 6 weeks

Runs on a trigger with nobody watching. Best where the rule is clear and the volume is high: file a document, raise a claim, flag a revision.

Custom build

New system

3 to 6 months

Where no tool on the market fits the way you work. Quoted separately, and only recommended after the cheaper two have been exhausted.

Data migration

Foundation

Varies

Getting the facts into one place so everything above can reach them. Unglamorous, and usually the reason a plugin is possible at all.

Workshops and training

Capability

Ongoing

Your team using these tools without us in the room. The difference between a tool that is installed and one that is used.

INDICATIVE INVESTMENT

Cowork Plugins
\$4K to \$12K

Automations
\$1K to \$5K

Custom builds
Quoted separately

Detailed pricing is in your Scope of Work.

R&D TAX INCENTIVE

Software development of this kind is often eligible, which can make the net cost roughly 43.5% less after the Australian R&D Tax Incentive. This isn't tax advice, confirm eligibility with your accountant or a registered R&D specialist.

The 9, at a glance

ID	INITIATIVE	TYPE	ANNUAL VALUE	BUILD FROM	PAYBACK
CH-001	Automated scheduling and rostering	Automate	\$143,520	-	-
CH-002	Auto-send shift notifications	Automate	\$47,840	-	-
CH-003	Replace Airtable with integrated CRM	Replace	\$420,000	-	-
CH-004	Eliminate paper onboarding	Eliminate	\$59,800	-	-
CH-005	Automate km and payroll calculation	Automate	\$71,760	-	-
CH-006	Automated funding alerts and plan renewal tracking	Automate	\$310,000	-	-
CH-007	AI-assisted worker-client matching	Automate	\$240,000	-	-
CH-008	AI-generated quarterly progress reports	Automate	\$95,680	-	-
CH-009	Centralised contact directory	Consolidate	\$64,584	-	-

CH-001

Automated scheduling and
rostering

Automate

\$143,520ESTIMATED

4+ weeks

THE SOLUTION

A ShiftCare Premium scheduling platform that replaces the spreadsheet entirely. Drag-and-drop rostering with built-in conflict detection, worker skill/location matching, and automatic availability checking. Workers see their schedules on their phone via the ShiftCare mobile app.

Recoverable-cost estimates use a blended labour rate over 46 working weeks and one 80% haircut unless noted. Figures are conservative and based on what was described in your audit sessions.

SOURCES

PP-009

PP-011

PP-012

PP-014

CH-002

Auto-send shift notifications

Automate

\$47,840ESTIMATED

< 1 week

THE SOLUTION

Automatic shift notifications via the ShiftCare mobile app. When Sarah publishes the schedule, every worker instantly sees their run sheet on their phone, formatted, with client details, addresses, and care notes included.

Recoverable-cost estimates use a blended labour rate over 46 working weeks and one 80% haircut unless noted. Figures are conservative and based on what was described in your audit sessions.

SOURCES

PP-010

CH-003

Replace Airtable with integrated CRM

Replace

\$420,000

ESTIMATED

1-2 weeks

THE SOLUTION

HubSpot Free CRM with a pipeline from 'New Enquiry' through 'Qualification' to 'Onboarding'. Website form auto-captures leads. Auto-acknowledgement email on receipt. Follow-up reminders so nothing falls through. Cancel Airtable (\$240/yr saved).

Recoverable-cost estimates use a blended labour rate over 46 working weeks and one 80% haircut unless noted. Figures are conservative and based on what was described in your audit sessions.

SOURCES

PP-001

PP-002

PP-003

PP-004

CH-004

Eliminate paper onboarding

Eliminate

\$59,800ESTIMATED

1-2 weeks

THE SOLUTION

Digital onboarding forms in ShiftCare, clients receive a link, complete and sign electronically, and their data flows directly into the client record. No printing, scanning, or re-typing. Paper backup maintained for elderly clients who can't use digital.

Recoverable-cost estimates use a blended labour rate over 46 working weeks and one 80% haircut unless noted. Figures are conservative and based on what was described in your audit sessions.

SOURCES

PP-005

PP-006

PP-008

CH-005

Automate km and payroll calculation

Automate

\$71,760

ESTIMATED

< 1 week

THE SOLUTION

ShiftCare's geo-fenced clock-in automatically captures worker arrival/departure times and locations. Travel km is calculated automatically from shift locations. Verified timesheet data pushes directly to Xero via native integration, eliminating the 3-source cross-check and manual data entry.

Recoverable-cost estimates use a blended labour rate over 46 working weeks and one 80% haircut unless noted. Figures are conservative and based on what was described in your audit sessions.

SOURCES

PP-020

PP-021

PP-022

CH-006

Automated funding alerts and plan renewal tracking

Automate

\$310,000

ESTIMATED

< 1 week

THE SOLUTION

ShiftCare Premium's NDIS Funding Period Management with real-time fund tracking and configurable alerts. Automatic warnings when funding drops below 20% or 4 weeks remaining. Plan renewal flagging 60 days before expiry. Sarah gets a dashboard view without needing Xero access.

Recoverable-cost estimates use a blended labour rate over 46 working weeks and one 80% haircut unless noted. Figures are conservative and based on what was described in your audit sessions.

SOURCES

PP-016

PP-018

PP-019

CH-007

Al-assisted worker-client matching

Automate

\$240,000ESTIMATED

< 1 week

THE SOLUTION

A structured matching system within ShiftCare, worker profiles capture skills, qualifications, location, personality traits, and client compatibility notes. Client profiles capture preferences, needs, and past worker feedback. The scheduling engine suggests optimal matches based on this data.

Recoverable-cost estimates use a blended labour rate over 46 working weeks and one 80% haircut unless noted. Figures are conservative and based on what was described in your audit sessions.

SOURCES

PP-007

CH-008

Al-generated quarterly progress reports

Automate

\$95,680ESTIMATED

< 1 week

THE SOLUTION

AI-powered report generation using ShiftCare Premium's one-click AI summaries. The system analyses 3 months of structured digital shift notes and compiles a formatted progress report draft. Sarah reviews, edits if needed, and sends to the case manager.

Recoverable-cost estimates use a blended labour rate over 46 working weeks and one 80% haircut unless noted. Figures are conservative and based on what was described in your audit sessions.

SOURCES

PP-017

CH-009

Centralised contact directory

Consolidate

\$64,584ESTIMATED

< 1 week

THE SOLUTION

A single contact directory within ShiftCare, all client details, family/ carer contacts, case manager information, worker details, and emergency contacts in one searchable system. One search finds everything.

Recoverable-cost estimates use a blended labour rate over 46 working weeks and one 80% haircut unless noted. Figures are conservative and based on what was described in your audit sessions.

SOURCES

PP-015

PART 12

The roadmap

The order we would do this in, what you feel first, and what we are protecting against along the way.

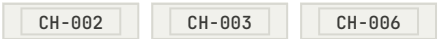
3 PHASES ~26 WEEKS 9 INITIATIVES

12

The roadmap

Phase 1: Fast controls

Weeks 1-2



Delivered over ~2 weeks

Phase 2: Connected operations

Weeks 3-8



Delivered over ~6 weeks

Phase 3: AI-assisted delivery

Weeks 9-12



Delivered over ~4 weeks

13 Appendix, where the full detail lives

Your portal bundle contains everything in this report plus the parts that only work on screen. Open it from the folder we sent, no login required.

OPEN ME.html	Start here. Links to every section below.
2-process-map.html	The interactive value chain. Click a stage to open its processes.
processes/	5 BPMN maps, one per process, with lanes and timings.
3-findings.html	All 33 findings, filterable by stage and confidence.
4-recoverable-cost.html	The full 11-item register with every calculation expanded.
5-blueprint.html	All 9 initiatives as cards, with the value working in each modal.
6-sops.html	Standard operating procedures, printable individually.

The technical appendix, the interactive process maps and the effort-vs-impact chart are portal-only. They rely on hover, filtering and zoom, and would be misleading flattened onto paper.

PROVENANCE

Every figure in this report is taken from the audit data, which is cited to session recordings and client-supplied documents.
Generated 31 August 2026.