ROI ROADMAP

A Carolinas Waterworks Distributor

Four automations, priced and sequenced, built from your operation's own numbers.

Prepared from conversations with **the Co-President and the VPO**,
April 3 to April 21, 2026. Every figure in this report traces to an input your team provided. Sources on page 8.

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ROI ROADMAP · OVERVIEW

Executive summary

This distributor has grown into a 20-plus-branch waterworks operation across six states. That growth rides on four things every branch does daily: quoting projects, coordinating job-site deliveries, keeping the right stock at the right branch, and keeping contractors informed while their projects run. Each one is document-heavy and handled by hand, and the paperwork multiplies faster than the people. This roadmap is built for that squeeze: take the clerical load off the branches so the growth continues without the back office growing at the same rate. Nothing here replaces a person. Hours move from keying documents to serving contractors.

Four automations follow, one per function. Each is scoped, priced, and estimated from volumes and rates your team gave us on the discovery and deep-dive calls.

$157,300 counted annual savings, all four automations	**$19,040** total one-time build cost, fixed price	**1.5 months** blended payback period

AUTOMATION	ANNUAL SAVING (COUNTED)	ONE-TIME COST	PAYBACK
1 · **Project quote prep:** contractor takeoffs to priced, reviewed quotes in minutes	$50,600	$5,440	1.3 months
2 · **Delivery coordination:** job-site deliveries scheduled, ticketed, and confirmed on their own	$42,400	$4,720	1.3 months
3 · **Branch inventory transfers:** scarce stock found and moved without the phone chain	$22,300	$3,920	2.1 months
4 · **Project order tracking:** acknowledgments matched, backorders watched, customers told first	$42,100	$4,960	1.4 months
Total	**$157,300**	**$19,040**	**1.5 months**

Savings are counted at 85% of computed value as a conservatism buffer. Every input and its source is listed on page 8; if a number there is wrong, the math moves with it and we reissue the report.

Where to start. Project quote prep first: it is the biggest saving and it lays the SKU-matching and document-reading plumbing that order tracking reuses. Project order tracking second, riding that same pipeline. Delivery coordination third; it stands alone and is fast to stand up. Branch transfers fourth, once the inventory and order data is already flowing.

AUTOMATION 1 OF 4

Project quote prep: takeoffs to priced quotes in minutes, not hours

TODAY

A contractor sends a takeoff: pipe, valves, hydrants, fittings, often by manufacturer code, sometimes a scanned PDF. An inside salesperson matches each line to a SKU, checks cost and availability, applies margin, and writes it up. At 250 quotes a month at 45 minutes each, about $76,500 a year of inside-sales time spent on assembly, not selling.

$25.50
what one project quote costs to build today, from takeoff to customer-ready

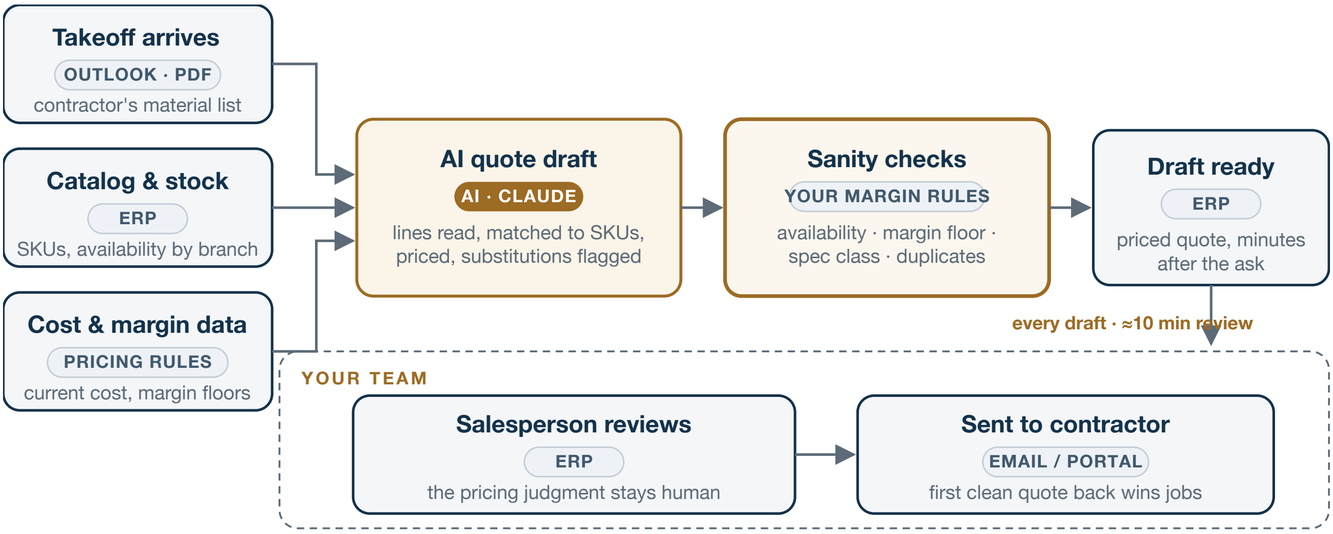
→ $5.67 after

> *The takeoff sits in the inbox while the contractor waits, and the first clean quote back usually wins.*
> the pattern in project-driven wholesale

THE AUTOMATION

The takeoff lands by email and a priced draft comes back in minutes: every line matched to your SKUs, priced with your margin rules and availability, substitutions flagged. The salesperson reviews and sends, about 10 minutes instead of 45, and the pricing judgment stays where it belongs.

HOW IT WORKS



The salesperson's judgment stays. The line-by-line assembly goes.

WHAT IT'S WORTH

Current annual cost (3,000 quotes × $25.50)	$76,500
Cost after automation (review only)	$17,000
Counted annual saving (85% of computed)	**$50,600**
One-time build $5,440 · Payback	**1.3 months**

AUTOMATION 2 OF 4

Delivery coordination: job-site deliveries scheduled, ticketed, and confirmed on their own

TODAY

Underground utility deliveries are not parcel drops. A crew is standing in a trench waiting on pipe, the job-site window is tight, and the paperwork trail runs from delivery ticket to bill of lading to signed proof of delivery. At 1,100 deliveries a month across branches and roughly 9 minutes of coordination each, that is about $55,400 a year of branch time spent scheduling, confirming, and chasing signatures.

$4.20
what coordinating one job-site delivery costs today: scheduling, ticket prep, confirmations, POD chasing

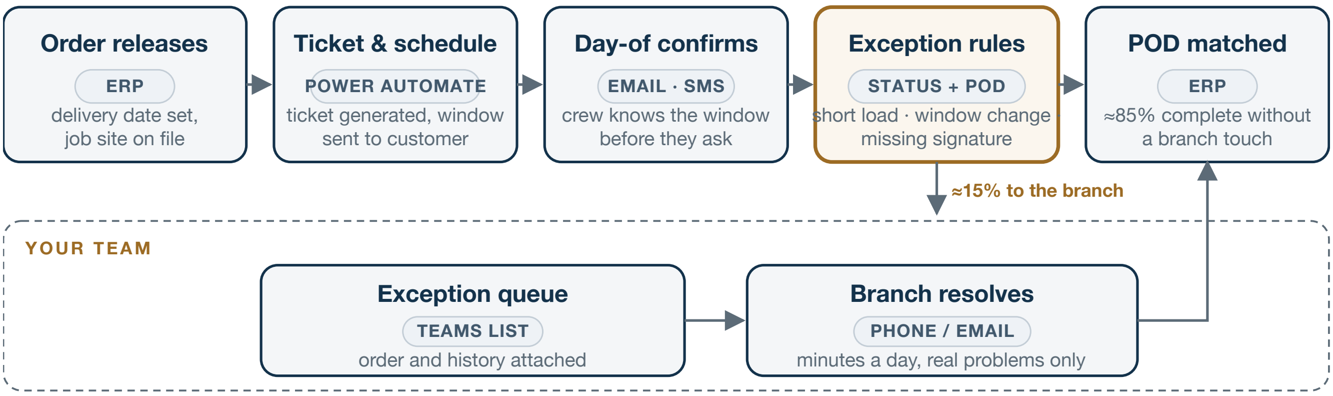
→ $0.42 after

> *The crew calls the branch, the branch calls the driver, the driver calls back. Three phone calls to answer one question: where's my pipe?*
> the pattern on project deliveries

THE AUTOMATION

When an order releases for delivery, the ticket generates itself, the customer gets the delivery window automatically, and a confirmation goes out the morning of. Signed PODs are captured and matched to the order the moment they exist. The branch only touches deliveries that break: a changed window, a short load, a site access problem, each flagged with the order history attached.

HOW IT WORKS



No AI in this one; plain rules are enough, which makes it the cheapest to run. Every touch is logged.

WHAT IT'S WORTH

Current annual cost (13,200 deliveries × $4.20)	$55,400
Cost after automation (exceptions only)	$5,500
Counted annual saving (85% of computed)	**$42,400**
One-time build $4,720 · Payback	**1.3 months**

AUTOMATION 3 OF 4

Branch inventory transfers: scarce stock found and moved without the phone chain

TODAY

Twenty-plus branches means twenty-plus places a hydrant might be sitting when a Charlotte job needs it tomorrow. Today, finding it is a phone chain: call the branches most likely to have it, check what is committed versus what looks available, negotiate who gives it up, write up the transfer. At 260 transfers a month at 25 minutes each, that is about $36,400 a year of manager time, and the misses cost more: a stockout on a spec item can stall a contractor's whole pour.

$11.67
what one inter-branch transfer costs to arrange today, across calls, lookups, and paperwork

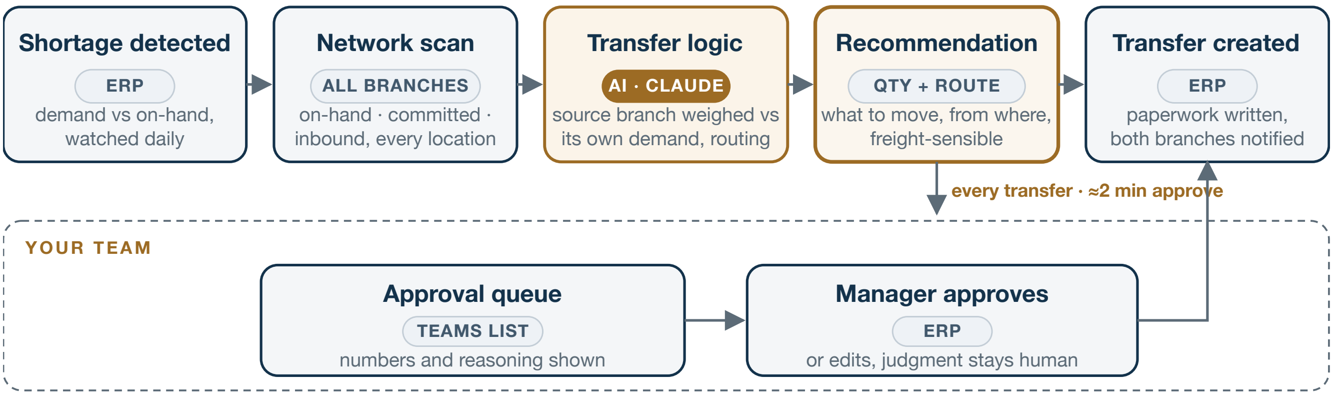
→ $3.27 after

> *The stock existed. It was just three branches away and nobody knew until the second phone call.*
> how transfers actually happen at multi-branch distributors

THE AUTOMATION

When a branch is short against demand, the system already knows where the item sits across the network: on-hand, committed, and inbound at every branch, weighed against each branch's own upcoming demand. A recommended transfer lands in the queue with quantities and freight-sensible routing. A manager approves or edits in a couple of minutes and the transfer paperwork writes itself.

HOW IT WORKS



The savings counted here are labor only. Avoided stockouts and stalled jobs are real value left out on purpose.

WHAT IT'S WORTH

Current annual cost (3,120 transfers × $11.67)	$36,400
Cost after automation (review and approve only)	$10,200
Counted annual saving (85% of computed)	**$22,300**
One-time build $3,920 · Payback	**2.1 months**

AUTOMATION 4 OF 4

Project order tracking: acknowledgments matched, backorders watched, customers told first

TODAY

An infrastructure project lives for months, and supporting the contractor means tracking every vendor order behind it. Acknowledgments arrive in every format a manufacturer can invent, each checked against the PO by hand, and ship dates slip quietly. At 850 vendor orders a month at 12 minutes each, about $57,100 a year, and the untracked slips become angry job-site calls.

$5.60

what one vendor order costs to track today: acknowledgment matching, backorder watching, status updates

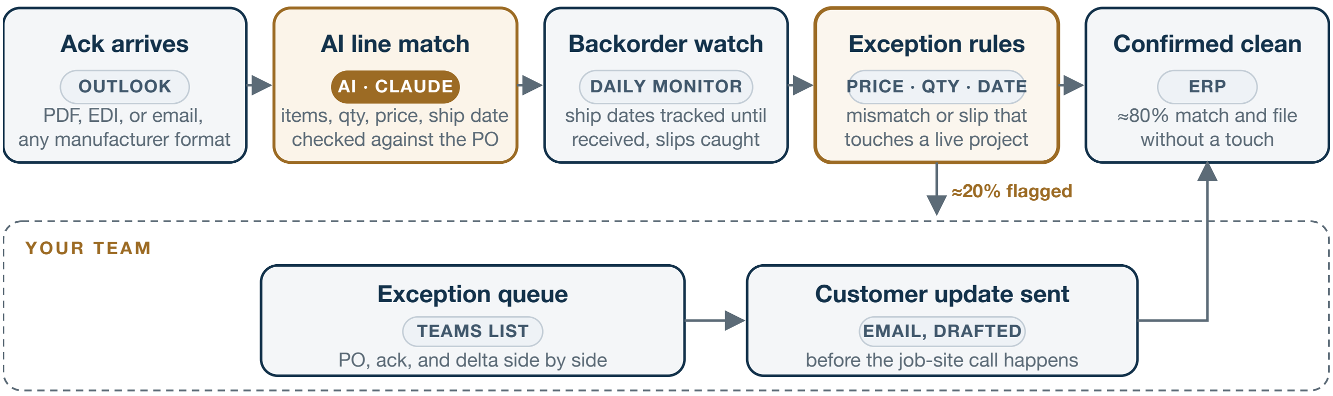
→ $0.75 after

> *The contractor finds out the valves slipped when the crew is already scheduled. That call costs more than the valves.*
>
> the failure mode this automation exists to kill

THE AUTOMATION

Every acknowledgment is read on arrival and matched to the PO line by line: items, quantities, prices, ship dates. Matches confirm silently. Mismatches and slips surface immediately, and the affected customers get a proactive update in your voice before they have a reason to call. The watching happens on its own, every order, every day.

HOW IT WORKS



Supporting a project stops meaning re-checking every order by hand. The watching is constant; your team handles what matters.

WHAT IT'S WORTH

Current annual cost (10,200 orders tracked × $5.60)	$57,100
Cost after automation (exceptions only)	$7,600
Counted annual saving (85% of computed)	**$42,100**
One-time build $4,960 · Payback	**1.4 months**

ROI ROADMAP · INVESTMENT

What it costs, and two ways to run it

AUTOMATION	ONE-TIME BUILD (FIXED)	MONTHLY, IF RETAINED
1 · Project quote prep	$5,440	$416
2 · Delivery coordination	$4,720	$360
3 · Branch inventory transfers	$3,920	$304
4 · Project order tracking	$4,960	$384
Total	**$19,040**	**$1,464**

Path A · Build + retainer

$19,040 one-time, then **$1,464/mo**, month to month.
We monitor every run, fix anything that breaks, absorb vendor and format changes, and improve the automations as branches open and the operation shifts. Quarterly review against the numbers in this report. Cancel with 30 days' notice. Running costs are on us: the AI processing and any tooling we add to run your automations are included, so no metered bill or surprise usage charges land on your desk.
First-year net: $120,700

Path B · Build + handoff

$19,040 one-time, plus **$3,040** training.
Two working sessions, one on one with our engineers, a written runbook, and a 60-day support window. We cover the tooling we introduce through training and the support window. After handoff the automations run on your own accounts, and your team owns and runs everything, with no ongoing fees to us.
First-year net: $135,300

There is a third path, and it is a real one: the diagrams and specs in this report are detailed enough for your team or another vendor to build from. If that is the better fit for you, this report is yours either way.

> **You do not pay in full until it works.** 40% to begin. The balance on each automation is due only when it is processing your live volume at the acceptance criteria on page 8. No refund mechanics to argue about, because the money follows the results.

Terms. Pricing valid 30 days from the cover date. · Timeline: 2 to 6 weeks per automation, built in the sequence on page 2. · To move fast, all we need is a look at the systems involved, a few sample documents, and one person to point us in the right direction. That's genuinely it. · Your data stays in your systems; nothing is copied out or used to train anything. · Retainer is month to month, cancel with 30 days' notice. · Handoff path includes a 60-day support window after training.

ROI ROADMAP · ASSUMPTIONS & SOURCES

Every number, and where it came from

Nothing here is an industry benchmark dressed up as your data. Each input below came from your team; if one is wrong, tell us and we reissue the report with the math moved accordingly.

INPUT	VALUE	SOURCE
Project quotes per month / minutes to build / to review	250 · 45 / 10	Co-President and VPO, discovery call, April 3 to April 21, 2026
Deliveries per month / coordination minutes / exceptions	1,100 · 9 · 15% @ 6	VPO, delivery workflow walkthrough, April 3 to April 21, 2026
Inter-branch transfers per month / minutes to arrange	260 · 25	VPO, branch transfer walkthrough, April 3 to April 21, 2026
Vendor orders per month / tracking minutes / exceptions	850 · 12 · 20% @ 8	VPO, vendor order tracking walkthrough, April 3 to April 21, 2026
Loaded hourly rates, inside sales / branch ops	$34 / $28	Co-President and VPO, loaded rate estimate, April 3 to April 21, 2026
Automation rates used	85% counted · drafted-for-review	QCF, set below what comparable builds sustain

Stack shown (ERP, Outlook, Teams, Power Automate; Claude on quotes, transfers, and acknowledgments) is a working assumption. We build inside whatever you actually run.

CONSERVATISM

All savings are counted at **85% of computed value**, and the transfer automation counts labor only. Faster quotes win more jobs, matched acknowledgments prevent margin leakage, avoided stockouts keep crews moving; all real value left out of the math. If the report errs, it errs low.

SENSITIVITY

The most load-bearing input is quote-build time. At 30 minutes instead of 45, the quote-prep saving becomes $28,900 and payback moves to 2.3 months. It still recovers its cost inside a quarter either way.

ACCEPTANCE CRITERIA (PAYMENT TERMS, PAGE 7 · FULL CHECK-BY-CHECK DETAIL IN A SHARED TEAMS SHEET AT KICKOFF)

AUTOMATION	PAID IN FULL WHEN	MEASURED OVER
1 · Quote prep	80%+ of drafts usable with minor edits · review under 12 min	First 100 takeoffs
2 · Delivery coordination	95%+ of orders ticketed and customer notified within an hour	First 2 weeks
3 · Branch transfers	80%+ of recommendations approved with no or minor edits	First month
4 · Order tracking	85%+ of true mismatches and date slips surfaced within a day	First month