

AI Transformation Roadmap

Meridian Components Pvt. Ltd.

Generated July 8, 2026

Prepared by Agentora Technologies

38/100

Overall AI Readiness

3

Stakeholders interviewed

3

Departments covered

2

Documents analyzed

Executive Summary

Meridian Components operates with capable teams but heavily manual processes: a 9-day month-end close, paper-based quality records at Plant 2, and a 3-4 day quotation cycle all stem from disconnected systems (Tally, a legacy MES, Zoho CRM) that exchange data through spreadsheets. The organization's AI readiness is early-stage — automation maturity averages 2-3 out of 5 and no AI initiatives are live — but the pain points identified are precisely the kind that modern document AI, workflow automation, and integration platforms address well. We recommend a foundation phase focused on digitizing capture points (invoices, QC sheets) and connecting core systems, followed by targeted AI pilots in invoice processing and quotation drafting. Executed over 12 months, these initiatives can materially shorten the financial close, give leadership real-time operational visibility, and free an estimated 20-30% of administrative capacity across the three departments surveyed.

Agentora Enterprise AI Maturity Model (AEAM)

Six dimensions determine how ready an organization is to adopt AI at scale. The profile below — not any single number — is what shapes the roadmap in this report.

Leadership 5/10

Directors review a monthly MIS pack and operations already plans automation initiatives — there is appetite, but no stated AI strategy or budget owner yet.

Data 3/10

Tally holds reliable financial data, but plant data is on paper or trapped in an unused MES, and departments exchange everything via spreadsheet exports.

Technology 4/10

Core systems exist (Tally, Zoho CRM, Plant 1 MES) but none are integrated; Plant 2 runs on paper and WhatsApp.

Process 2/10

Key processes — month-end close, QC recording, quotations — are manual, undocumented beyond one process note, and differ between plants.

Governance 2/10

Approvals travel over email and WhatsApp with no audit trail; there is no data-governance or AI-usage policy despite GST and NDA obligations.

Culture 3/10

Individual teams improvise well (shared drives, WhatsApp coordination), but the patchy Zoho CRM adoption shows new tools don't stick without sponsorship.

Knowledge Maturity

AI systems are only as good as the organizational knowledge they can draw on. This measures how well knowledge is captured, standardized, and traceable today.

Documentation 3/10

One good process note exists (month-end close); most process knowledge lives in individuals' heads.

Process Standardization 2/10

The two plants run materially different processes for the same QC and production activities.

Decision Traceability 2/10

Approvals travel over email and WhatsApp — decisions leave no searchable trail.

Data Quality 3/10

Financial data is trustworthy; operational and CRM data is incomplete or delayed.

Knowledge Capture 1/10

No systematic capture anywhere: binders, inboxes, and chat groups are the de facto knowledge base.

Department Findings

Finance

Finance is the most manual of the surveyed departments. Roughly 1,200 vendor invoices per month are keyed by hand into Tally, month-end close takes 9 working days, and reconciliation knowledge is concentrated in a single deputy manager.

- Manual invoice entry and three-way matching (~1,200 invoices/month)
- 9-day month-end close driven by line-by-line Excel bank reconciliation
- Tally is not integrated with plant systems or the CRM — data moves via exported spreadsheets
- Credit approvals for new distributors take 2-3 weeks of manual data gathering
- Key-person risk: one person holds all reconciliation knowledge

Operations

Operations runs two plants with very different digital maturity: Plant 1 has a legacy MES whose data is rarely used; Plant 2 is paper-based. Scheduling, stock visibility, and quality trend analysis all suffer from delayed, manual data capture.

- Paper QC sheets (~180/week) typed into Excel with a 9-day backlog, delaying supplier quality insight by a month
- No real-time inventory visibility across the two plants
- Production scheduling redone manually for every rush order; accepting one takes a day of phone calls
- MES run data at Plant 1 is captured but not exported or analyzed

Sales & Marketing

Sales has partial CRM adoption but quotation and tender workflows remain slow because pricing depends on manual inputs from operations and finance. Lead follow-up and forecasting are inbox- and spreadsheet-driven.

- Quotation turnaround of 3-4 days; OEM tenders need multi-department costing with repeated revisions
- Zoho CRM used by only half the team and not connected to Tally, so order-status queries require calls to finance
- Leads tracked in individual inboxes — follow-ups slip
- No attribution of marketing spend to conversions

Capability Heat Map

Automation level of each department's key capabilities today, from 0 (fully manual) to 5 (fully automated). The gaps are where AI delivers the fastest returns.

Finance

Invoice processing	■	■	■	■	■
Bank reconciliation	■	■	■	■	■
MIS / reporting	■	■	■	■	■
Credit approvals	■	■	■	■	■

Operations

Production scheduling	■	■	■	■	■
Quality inspection (Plant 2)	■	■	■	■	■
Inventory visibility	■	■	■	■	■
Machine data capture (Plant 1)	■	■	■	■	■

Sales & Marketing

Quotations & tenders	■	■	■	■	■
Lead & follow-up tracking	■	■	■	■	■
Forecasting	■	■	■	■	■
Marketing attribution	■	■	■	■	■

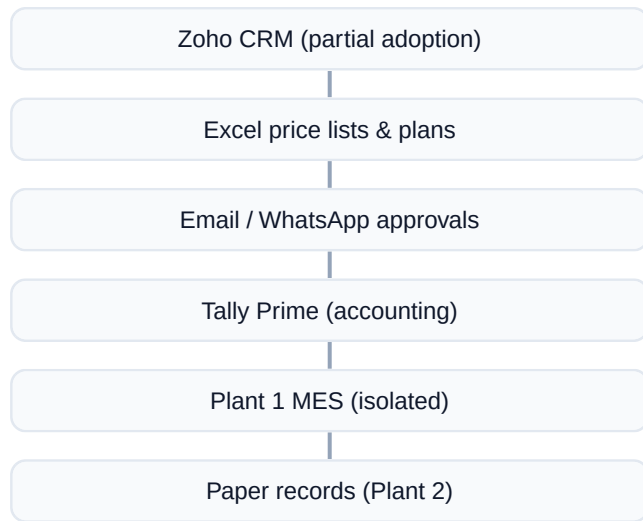
Data Readiness

Before AI comes data. Each source is rated 1-5 for AI-readiness — structure, completeness, and accessibility.

Tally Prime (financials) Structured, complete, and exportable — the strongest data asset; only integration is missing.	■	■	■	■	■
Plant 1 MES (machine data) Captured automatically but never exported or analyzed; a pipeline unlocks it as-is.	■	■	■	■	■
Zoho CRM (pipeline & activity) Only about half the team logs activity, so coverage is incomplete and biased.	■	■	■	■	■
Documents & invoice scans Exist digitally on a shared drive but unstructured — no extraction or indexing yet.	■	■	■	■	■
Plant 2 records (QC, production) Paper-first with a 9-day transcription lag; must be digitized at the point of capture.	■	■	■	■	■
Master data (items, vendors, customers) Duplicated between Tally, Excel, and the CRM with no ownership or matching rules.	■	■	■	■	■

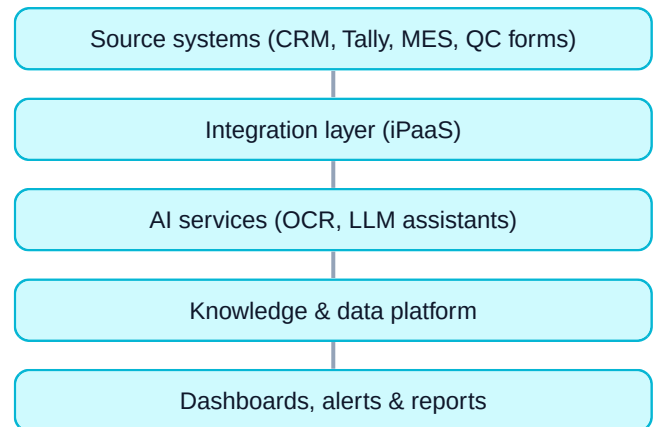
Architecture: Today and Target

Current State



Systems exist but do not talk to each other: data moves between them as spreadsheet exports, email attachments, and re-typed paper records, creating lag, duplication, and no single source of truth.

Future State



Source systems stay in place; an integration layer moves their data automatically into a central platform where AI services enrich it and dashboards expose it — every later AI use case plugs into this same backbone.

AI Opportunity Matrix

Every initiative in this report positioned by expected impact and delivery effort. Start top-left.

High Impact / Low Effort

Immediate — do first

- Digital QC Capture at Plant 2

High Impact / Higher Effort

Roadmap — plan and phase

- AI-Powered Invoice Capture & Matching
- Tally–CRM–Plant Data Integration Layer
- AI Quotation & Tender Drafting Assistant

Moderate Impact / Low Effort

Quick fills — batch alongside

- Automated Bank Reconciliation

Moderate Impact / Higher Effort

Defer — revisit after foundations

- Distributor Credit-Check Automation
- Cross-Plant Inventory & Scheduling Visibility

Prioritized Initiatives

1. AI-Powered Invoice Capture & Matching

Description	Deploy document AI to extract vendor invoice data from scans/PDFs, auto-match against purchase orders and goods receipts, and post approved entries to Tally. Targets the ~1,200 invoices/month currently keyed by hand and directly shortens the close.
Impact	High
Effort	Medium
Department(s)	Finance

2. Digital QC Capture at Plant 2

Description	Replace paper QC sheets with a tablet-based form (or scan-and-extract AI for a transition period), eliminating the 9-day typing backlog and enabling weekly supplier-quality trend dashboards.
Impact	High
Effort	Low
Department(s)	Operations

3. Tally–CRM–Plant Data Integration Layer

Description	Stand up lightweight integrations (middleware or iPaaS) connecting Tally, Zoho CRM, and Plant 1's MES so order status, stock, and financial data flow without spreadsheet exports. Foundation for every later AI use case.
Impact	High
Effort	High
Department(s)	Finance, Operations, Sales & Marketing

4. AI Quotation & Tender Drafting Assistant

Description	Use an LLM assistant grounded in price lists, past quotations, and costing rules to draft quotations and OEM tender responses for human review, cutting turnaround from days to hours while keeping confidential tender data in-house.
Impact	High
Effort	Medium
Department(s)	Sales & Marketing, Finance

5. Automated Bank Reconciliation

Description	Introduce rule-based plus ML-assisted transaction matching for the four bank accounts, replacing line-by-line Excel reconciliation and reducing key-person dependency through documented, systematized rules.
Impact	Medium
Effort	Low
Department(s)	Finance

6. Distributor Credit-Check Automation

Description	Automate the gathering of GST filings, bank references, and internal payment history into a single credit dossier with an AI-generated risk summary, compressing 2-3 week approvals into days.
Impact	Medium
Effort	Medium
Department(s)	Finance, Sales & Marketing

7. Cross-Plant Inventory & Scheduling Visibility

Description	Consolidate stock and machine-availability data from both plants into a shared dashboard so rush-order feasibility can be answered in minutes instead of a day of phone calls; a stepping stone toward AI-assisted scheduling.
Impact	Medium
Effort	High
Department(s)	Operations, Sales & Marketing

Investment & Expense Estimates

Cloud Service Comparison

Equivalent managed services on the three major clouds for each workload the roadmap requires, with indicative monthly costs at the volumes discussed during discovery.

Workload	Microsoft Azure	Google Cloud	AWS	Est. cost / month
Invoice OCR / document AI (~1,200 invoices/mo)	Azure AI Document Intelligence	Document AI (Invoice Parser)	Amazon Textract (AnalyzeExpense)	\$15–40
LLM API for quotation & credit-summary drafting	Azure OpenAI Service	Vertex AI (Gemini)	Amazon Bedrock (Claude)	\$50–150
Integration / iPaaS (Tally CRM MES)	Azure Logic Apps	Application Integration	AWS Step Functions + AppFlow	\$60–200
BI dashboards (inventory, QC trends, MIS pack)	Power BI Pro (per user)	Looker Studio Pro	Amazon QuickSight	\$100–250
Central data store for plant & finance data	Azure SQL Database	Cloud SQL (PostgreSQL)	Amazon RDS (PostgreSQL)	\$80–200
App hosting (QC capture forms, dashboards)	Azure App Service	Cloud Run	AWS App Runner	\$30–100

Recommended Tools

Tooling recommendations, split between improvements to systems already in use and net-new capabilities.

Tool	Purpose	Category	Est. cost / month
Tally Prime + integration connector	Keep Tally as the accounting system of record but add a licensed connector/API bridge so invoices, payments, and order status sync to the CRM and dashboards without spreadsheet exports.	Current infrastructure improvement	\$40–80
Zoho CRM (full-team rollout + Zoho Flow)	Complete adoption of the existing CRM licence, add workflow automation for follow-up reminders, and connect it to Tally via Zoho Flow so sales can self-serve order status.	Current infrastructure improvement	\$150–300
Plant 1 MES data export pipeline	Scheduled extraction of machine run data from the existing MES into the central data store, turning already-captured data into scheduling and OEE insight.	Current infrastructure improvement	\$50–120
Tablet-based QC capture app	Replace Plant 2's paper QC sheets with a simple digital form (e.g. a low-code app), eliminating the 9-day transcription backlog and feeding supplier-quality dashboards in real time.	New capability	\$100–200

Document AI invoice capture service	Cloud OCR tuned for invoices, feeding extracted line items into an approval queue and then into Tally — the engine behind the invoice automation initiative.	New capability	\$15–40
AI quotation assistant (LLM-based)	Drafts quotations and OEM tender responses from price lists and past bids for human review; runs against an enterprise LLM API with no training on customer data, satisfying NDA constraints.	New capability	\$50–150

Costs are indicative estimates based on public list pricing at the time of writing; actual spend depends on usage volumes, region, and negotiated discounts.

Return on Investment

Estimated annual cost against expected annual benefit for each initiative, based on the volumes and time figures reported during discovery. Figures are deliberately conservative.

Initiative	Est. annual cost	Est. annual benefit	Payback	ROI
AI invoice capture & matching	\$700–1,400	\$5,500–8,000 in recovered staff time	1–2 months	5–8x in year one
Basis: 1,200 invoices/mo × ~7 min manual entry & matching each H 140 hrs/mo recovered, at a loaded cost of ~\$4/hr for accounts staff; excludes fewer late-payment penalties.				
Digital QC capture at Plant 2	\$1,400–2,600	\$5,000–9,000 from recovered typing time and earlier supplier-defect detection	3–5 months	2.5–4x in year one
Basis: ~180 sheets/week transcribed (H30 hrs/mo) plus catching the ~3% batch rejection trend a month earlier, reducing rework and expedited replacements.				
Automated bank reconciliation	\$500–1,000	\$3,500–5,000 from 2–3 days shaved off each monthly close	2–3 months	4–6x in year one
Basis: Line-by-line Excel reconciliation of 4 accounts currently consumes ~2.5 days of the 9-day close; also reduces key-person dependency (unquantified).				
AI quotation & tender assistant	\$900–2,200	\$8,000–15,000, mostly revenue upside from faster tender turnaround	3–6 months	4–7x in year one (revenue-dependent)
Basis: Cutting quotation turnaround from 3–4 days to same-day; conservatively assumes 1–2 additional OEM tenders won per year at typical order values. Treat as upside, not guaranteed saving.				
Tally–CRM–plant integration layer	\$1,700–4,000	\$6,000–10,000 from eliminated spreadsheet exports and order-status calls	4–8 months	2–3x in year one, compounding after
Basis: Every department reported moving data via exports; estimate covers ~50 hrs/mo of export/re-entry/status-chasing across finance, sales, and operations. Enables later initiatives.				
Overall program (Year 1)	\$5,200–11,200	\$28,000–47,000	3–5 months blended	H3.5–5x blended
Basis: Sum of the above with no double-counting; excludes one-time implementation effort (estimated separately during scoping) and soft benefits like decision speed and audit readiness.				

AI Adoption Options — Full Market Spectrum

For every workload there is more than one credible route. Alongside the major clouds, newer low-cost AI vendors and open-source tools can deliver the same capability at a fraction of the price — with different tradeoffs in support, integration effort, and operational ownership.

Workload	Premium (managed cloud)	Budget / emerging vendor	Open-source / self-hosted
Invoice OCR / document AI	Azure AI Document Intelligence — \$15–40/mo	Mindee / Nanonets invoice API — \$0–25/mo at this volume (free tiers cover part)	PaddleOCR + open LLM, self-hosted — \$0 licence, ~\$20–40/mo infra
Tradeoffs: Managed services give accuracy SLAs and zero maintenance; open-source needs tuning for Indian GST invoice formats and someone to own it.			

LLM API (quotations, credit summaries)	Azure OpenAI / Bedrock Claude — \$50–150/mo	Claude Haiku, Gemini Flash, or DeepSeek API — \$5–25/mo for the same volume	Qwen or Llama self-hosted — \$0 licence, needs GPU (~\$80–200/mo cloud or one-time hardware)
Tradeoffs: Budget-tier frontier-lite models are now strong enough for drafting tasks at ~10x lower cost; self-hosting only pays off if NDA constraints demand fully in-house processing.			
Integration / workflow automation	Azure Logic Apps / AWS Step Functions — \$60–200/mo	Make.com or n8n Cloud — \$20–60/mo	n8n self-hosted — \$0 licence, ~\$10–20/mo on a small VM
Tradeoffs: n8n self-hosted is very capable and popular for Tally-style integrations; the cost is owning uptime and upgrades yourself.			
BI dashboards	Power BI Pro — \$100–250/mo for the team	Zoho Analytics (fits existing Zoho stack) — \$30–60/mo; Looker Studio — free	Metabase or Apache Superset self-hosted — \$0 licence, ~\$20–40/mo infra
Tradeoffs: Zoho Analytics integrates naturally with the CRM already in use; Metabase is the strongest free option if IT can host it.			
Central data store	Azure SQL / Amazon RDS — \$80–200/mo	Supabase or Neon (managed Postgres) — \$25–70/mo	PostgreSQL self-hosted — \$0 licence, ~\$20–40/mo VM + backups
Tradeoffs: Managed Postgres startups now offer near-RDS reliability at a third of the price; self-hosting adds backup and patching responsibility.			
QC capture / low-code apps	Microsoft Power Apps — \$100–200/mo for inspectors	Google AppSheet or Zoho Creator — \$50–100/mo	Budibase or Appsmith self-hosted — \$0 licence, ~\$15–30/mo infra
Tradeoffs: All three tiers handle tablet forms well; the premium tier mainly buys deeper Microsoft 365 integration the client doesn't currently rely on.			

ROI figures and option pricing are indicative, based on stakeholder-reported volumes and public list pricing; validate against actual usage before committing.

Quick Wins: First 90 Days

30 Days	60 Days	90 Days
• Invoice OCR pilot for the top 20 vendors • Rule-based bank reconciliation for all 4 accounts • Tablet QC form live on one Plant 2 line	• Tally connected to Zoho CRM via the integration layer • First dashboard: cross-plant inventory & QC trends • QC transcription backlog cleared	• AI quotation assistant pilot with the OEM tender team • Distributor credit dossier automation • KPI review against discovery baselines

Phased Roadmap

Foundation — Months 1-3

- Digitize Plant 2 QC capture and clear the transcription backlog
- Deploy automated bank reconciliation for all four accounts
- Design the integration architecture for Tally, Zoho CRM, and the Plant 1 MES
- Establish data-handling policy covering GST/audit requirements and India data residency

Pilot — Months 4-7

- Go live with AI invoice capture for the top 20 vendors, then expand
- Pilot the AI quotation assistant with the OEM tender team under NDA-compliant, in-house data handling
- Deliver first integrated order-status view connecting CRM and Tally
- Measure baseline vs. pilot KPIs: close duration, quotation turnaround, QC data lag

Scale — Months 8-12

- Extend invoice automation to all vendors; target month-end close under 5 days
- Roll out cross-plant inventory and scheduling dashboard
- Automate distributor credit dossiers
- Full CRM adoption push with AI-assisted follow-up reminders and basic marketing attribution

Risks & Governance

Risk	Probability	Impact	Mitigation
GST invoice data processed outside India by cloud AI services	Medium	High	Use India-region deployments only and pin data residency contractually before any Finance workload goes live.
Confidential OEM tender content exposed via third-party LLM	Low	High	Enterprise LLM API with contractual no-training guarantee, or self-hosted model; tender documents never leave controlled infrastructure.
New tools repeat Zoho CRM's patchy adoption	High	Medium	Executive sponsor per initiative, department champions, and adoption KPIs reviewed monthly alongside the MIS pack.
Key-person dependency in reconciliation during transition	Medium	Medium	Document matching rules before automating them; run automated and manual reconciliation in parallel for one quarter.
Quality-record gaps while Plant 2 moves off paper	Medium	Medium	Four weeks of parallel paper + digital running per line, with daily spot checks before paper is retired.
Integration layer scope creep delays visible wins	Medium	Medium	Phase-gate the integration work: CRM-Tally first, plant data second; quick wins ship independently of it.

Enterprise Architecture Alignment

How well each architecture layer currently supports the target state — where governance and integration work must accompany the AI initiatives.

Business 5/10

Clear goals per department (faster close, real-time visibility, faster tenders) that AI can serve directly.

Application 3/10

Core applications exist but overlap with spreadsheets that act as shadow systems.

Data 2/10

No shared data platform, no master-data ownership, mixed digital/paper capture.

Technology 3/10

Cloud-ready (already on Zoho, shared drives) but no integration or automation infrastructure.

Security 4/10

Awareness of GST and NDA constraints is good; formal controls and policies are thin.

Integration 1/10

The weakest layer: every system is an island connected by exports — the roadmap's central investment.

No data or AI governance forum; recommend standing one up alongside the first pilots.

How These Recommendations Were Reached

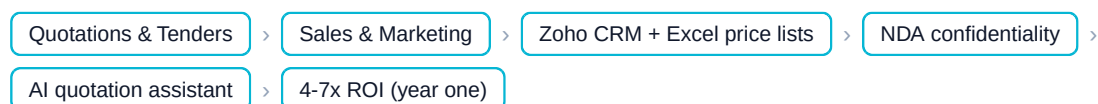
Every recommendation in this report is traceable: from a business capability, through the departments and systems involved, to the constraint that shapes the solution and the expected return. These chains come from Agentora's knowledge graph of your organization.



The densest cluster in the graph: one capability touches the ERP, a compliance constraint, and 1,200 documents a month — which is why invoice capture ranks first.



The 9-day transcription lag disconnects quality data from purchasing decisions; digitizing the capture point reconnects them a month earlier.



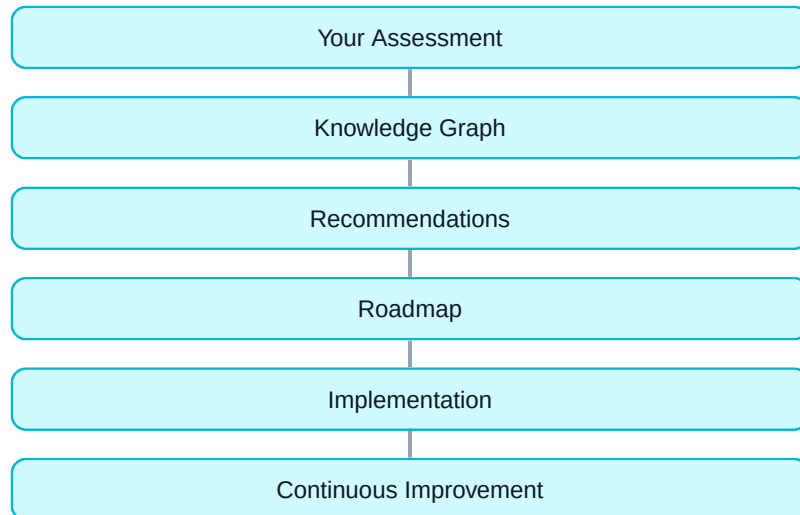
The NDA constraint discovered in Sales directly shaped the recommendation: an enterprise LLM with no-training guarantees rather than a consumer tool.



Three departments independently reported the same symptom — data moving by export — pointing at one shared root cause that unlocks every later initiative.

Why Agentora

This report is not a one-time document. It is the first output of a knowledge platform built around your organization. The discovery answers and documents behind this assessment have been structured into a knowledge pack — an ontology of your capabilities, systems, data, and constraints — and every recommendation above is generated from, and traceable to, that structured knowledge.



As initiatives go live, their real-world results feed back into the same knowledge graph: ROI estimates become measured returns, maturity scores are re-assessed, and each subsequent report gets sharper. You are not buying a PDF — you are standing up a living model of your organization's AI transformation.

Appendix: Discovery Evidence

The stakeholder responses this assessment is grounded in, reproduced for traceability.

Priya Nair — Finance

Q: What are the top 2–3 challenges your department faces today that AI could help solve?

A: Month-end close takes 9 working days because reconciliations are manual. Vendor invoice processing is a bottleneck — around 1,200 invoices/month keyed in by hand. Cash-flow forecasting is done in spreadsheets and is often out of date.

Q: Which tools, systems, or platforms does your department rely on daily?

A: Tally Prime for accounting, Excel for everything else, a shared drive for invoice scans, and email for approvals.

Q: Which types of data does your department work with?

A: ["Spreadsheets", "Documents & PDFs", "Structured data / data warehouse"]

Q: How would you rate your department's current use of automation?

A: 2

Q: Does your department have existing AI or automation initiatives underway?

A: No

Q: What decisions in your department take the longest to make, and why?

A: Credit approvals for new distributors take 2-3 weeks because we manually pull GST filings, bank references, and payment history from separate places.

Q: Which outcomes matter most to your department?

A: ["Cost reduction", "Productivity", "Risk / compliance"]

Q: Are there compliance or data-sensitivity constraints specific to your department?

A: {"answer": "Yes", "detail": "GST and statutory audit requirements; invoice data must stay within India."}

Q: Which financial processes (e.g. invoicing, reconciliation, budgeting, reporting) take the most manual effort?

A: Invoice entry and three-way matching, bank reconciliation, and preparing the monthly MIS pack for directors.

Q: Which financial systems or ERP modules do you rely on, and how well are they integrated with each other?

A: Tally Prime only. It is not integrated with the plant's production system or the sales CRM — data moves between them by exported spreadsheets.

Rajesh Kulkarni — Operations

Q: What are the top 2–3 challenges your department faces today that AI could help solve?

A: Production scheduling is redone manually every time a rush order lands. Quality inspection records are on paper and get digitized days later. We can't see real-time inventory across the two plants.

Q: Which tools, systems, or platforms does your department rely on daily?

A: A legacy MES at Plant 1, paper travellers at Plant 2, Excel-based production planning, WhatsApp groups for shift coordination.

Q: Which types of data does your department work with?

A: ["Spreadsheets", "Images / scans", "Other"]

Q: How would you rate your department's current use of automation?

A: 2

Q: Does your department have existing AI or automation initiatives underway?

A: Planned

Q: What decisions in your department take the longest to make, and why?

A: Deciding whether to accept a rush order — we have to phone both plants to check machine availability and material stock, which takes a day or more.

Q: Which outcomes matter most to your department?

A: ["Productivity", "Cost reduction", "Customer experience"]

Q: Are there compliance or data-sensitivity constraints specific to your department?

A: {"answer": "No", "detail": ""}

Q: Which operational processes (scheduling, inventory, quality checks, logistics) rely most on manual tracking?

A: Daily production scheduling, manual stock counts, and paper-based quality check sheets that are typed into Excel at week end.

Q: How is operational data captured — manually, via sensors/systems, or a mix?

A: Mostly manual. Plant 1's MES captures machine run data but nobody exports it regularly; Plant 2 is entirely paper and Excel.

Ananya Desai — Sales & Marketing

Q: What are the top 2–3 challenges your department faces today that AI could help solve?

A: Quotation turnaround is 3-4 days because pricing needs inputs from operations and finance. Follow-ups slip through because leads live in individual inboxes. No visibility into which marketing spend actually converts.

Q: Which tools, systems, or platforms does your department rely on daily?

A: Zoho CRM (adopted last year, patchily used), Outlook, Excel price lists, Canva and Meta Ads for marketing.

Q: Which types of data does your department work with?

A: ["Customer communications", "Spreadsheets", "Documents & PDFs"]

Q: How would you rate your department's current use of automation?

A: 3

Q: Does your department have existing AI or automation initiatives underway?

A: No

Q: What decisions in your department take the longest to make, and why?

A: Custom pricing for large OEM tenders — every tender needs a costing exercise involving three departments and usually two rounds of revision.

Q: Which outcomes matter most to your department?

A: ["Revenue growth", "Customer experience", "Productivity"]

Q: Are there compliance or data-sensitivity constraints specific to your department?

A: {"answer": "Yes", "detail": "OEM customers require NDAs; tender documents are confidential."}

Q: Which parts of the sales cycle (lead qualification, proposals, follow-ups, forecasting) take the most time?

A: Preparing quotations and tender responses, and manual follow-up tracking. Forecasting is a monthly guess in Excel.

Q: What CRM or sales tools do you use, and how well do they integrate with other systems?

A: Zoho CRM, but only half the team logs activity in it. It is not connected to Tally, so order status questions require calls to finance.