FROM THE BOOK AI, BUT FIRST · CHRISMC.COM/EMBED

The EmbedRight Canvas

BUSINESS: Harper & Co.

COMPLETED BY: Sarah + partners

DATE: 4 mornings

PART I — DISCOVERY · ONE IDEA PER POST-IT. WORK IN ORDER: V, K, F, H.

V The Value Map

CHAPTER 1

What are customers actually paying for?

- V1 What specific outcome changes for customers because of us?
- V2 What would they lose if we disappeared tomorrow?
- V3 Which part of our process do they most often compliment or thank us for?
- V4 Where do we charge a premium, and why does the customer accept it?

V1 Never a tax bill they didn't see coming

V3 The October heads-up call

V1 ~~Accounts & returns on time~~

V4 Partner review: +33%, no haggling

V? Why do the big clients stay? Ask.

K The Knowledge Map

CHAPTER 2

Where does your expertise live, and can you find it when you need it?

- K1 Where does the know-how behind your core work actually live?
- K2 When new work comes in, what past work or data do you reach for?
- K3 Which decisions follow rules that nobody has written down?
- K4 What would you wish existed if you had to onboard someone in 48 hours?

K1 Client history in managers' heads

K2 Last year's file, rolled forward

K3 Who needs an October call: on no list

K1 Engagement letters: 4 versions

K4 A client summary per client. None exist

F The Friction Map

CHAPTER 3

Where is time, money and energy bleeding out?

- F1 What tasks happen more than 10 times per week?
- F2 Where does work pile up or slow down? Where are the bottlenecks?
- F3 What do you spend time explaining or re-explaining repeatedly?
- F4 Where do things fall through the cracks or get chased too late?

F1 Chasing bank statements: 9 hrs/wk

F1 Deadline reminders sent by hand

F3 Same payment questions, daily

F2 Partners review everything

F4 Engagement letters re-typed

H The Human Layer

CHAPTER 4

What must stay human, and why does it get stronger as AI improves?

- H1 What do customers value about dealing with you specifically?
- H2 Where does trust determine the outcome?
- H3 Where would automating a process erode your value?
- H4 What does your business do that a long-standing customer would call irreplaceable?

H3 The October call. Never automate.

H1 A named person who knows them

H2 Partner review meeting

H4 "She rang before I knew I had a problem"

SOP Notes

What is written down, what isn't, and where the gaps are. Bring your process documents.

Year-end checklist exists. Everything client-facing is "how we've always done it".

PART II — LEVERAGE POINT PRIORITISER

P Prioritised findings

CHAPTER 5

Score every post-it. Keep three.

Impact 1–5

1	2	3	4	5
Marginal		Clear gain		Revenue, retention, owner time

AI suitability +2 FOR EACH YES · PARTLY = +1

- +2 Does it follow a predictable pattern?
- +2 Does it happen often enough to justify building?
- +2 Are there written records of how it's done?
- +2 If it's occasionally imperfect, is that manageable?

Impact × AI suitability = Priority

#1 Automate statement chasing

Impact 5 × Suitability 7 = 35

#2 October call list from client data

Impact 4 × Suitability 6 = 24

#3 Deadline reminders

Impact 3 × Suitability 7 = 21

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