Morrison Low Transcripts

- Session 1

  00:00:00 Speaker 1 My computer, I was prepared, I'm old school. You're old school. 00:00:03 Speaker 2 I'm old school. Anne was just saying she feels bad for coming into an AI automation kind of workshop. 00:00:12 Speaker 1 With a piece of paper. 00:00:13 Speaker 3 No, no. It works. She's welcome. Yeah. 00:00:18 Speaker 4 Yeah, look at that. Come laughing, because I'm like, yeah, I'm taking like a notepad into an AI meeting. If I write something down. It goes into my head. Me too. And very tactile. Yeah. 00:00:33 Speaker 3 I believe it's the way we learnt. Did you actually, like, I'm of that generation where we learnt with a pen, but then we became computers. Right. And I cannot think without this in my hand, even though I only use this. 00:00:48 Speaker 1 Yeah, right. It's funny, eh? Yeah. 00:00:49 Speaker 3 And I hardly ever check my notes. No, me either. But unless I. 00:00:54 Speaker 4 write it down, it doesn't go in. I like this, you've got the IT360 side and the Morrison Low side. It's a bunch of lawyers facing off. 00:01:03 Speaker 1 We could mix and mingle, but hey, we won't do that. 00:01:06 Speaker 4 We'll put you in the middle, unless you want the end. No, no, we're good. Hey. 00:01:09 Speaker 5 Good to see you, man. How are you? I'm good, thank you. 00:01:12 Speaker 3 Rochelle, hi. Matt. 00:01:14 Speaker 5 Nice to meet you. Hi, Matt. Sandy, nice to meet you. 00:01:18 Speaker 1 Are we doing fireflies? We can. We definitely can. 00:01:22 Speaker 3 I know we wanted to. 00:01:25 Speaker 1 I've also got this little recorder thing, if that's okay, just in case, I can leave it on the table or just sit here. Who's fireflies is it? Between one of us. 00:01:33 Speaker 4 Matt's the only one with fireflies. Matt. 00:01:35 Speaker 1 Oh yeah, cool. Oh yeah, it's working. 00:01:37 Speaker 4 We always do fireflies. 00:01:39 Speaker 1 Do you? Yeah, we do fireflies. 00:01:40 Speaker 4 We're trialing it across the business. We've got four users giving it a good go. Oh yeah. 00:01:46 Speaker 1 Yeah. 00:01:46 Speaker 4 We trialed others first, didn't we? Fireflies versus, is that plaud. 00:01:51 Speaker 1 Plaud. This is plaud. 00:01:52 Speaker 4 Yeah. And? Yeah. 00:01:54 Speaker 1 honestly they've all got their pros and cons and actually so funny and at the other day they're all sort of the same in terms of technology if you think about it was really just a speaker microphone and some kind of LLM or language logic model which does the transcription and then there's a bunch of fanciness around the site so this one's got a physical thing and an application on the phone by flies has a login and you can chat with the transcripts at the end of the day it's all the same the quotes what's actually. 00:02:24 Speaker 1 I'm seeing and I'm actually going to do this ourselves for our own business is build my own version yeah of fireflies because the ticks actually all there I've studied five at the top and the actual transcription models the same they all use the top ABC so they don't actually build their own transcription models they use assembly or they use deep Graham or you know these other research rooms that basically do transcription for a living yeah these guys plug into that they don't make their own model it's just open AI or it's just Gemini or it's Claude they just orchestrate it, and put a fancy front end on. 00:02:55 Speaker 5 Oh, okay. 00:02:56 Speaker 1 Makes sense. So they're just a fancy front end that actually plugs in, it's like a cake. They don't make the flour or the eggs or the whatever. They're just, they're the ones that pull it all together. 00:03:06 Speaker 4 The thing that I'm interested in is the accuracy, of the transcript, the security, and the cost. 00:03:12 Speaker 3 That's what I was gonna say. We actually trialed multiple over the last year or so. And I actually did an interesting experiment where we were interviewing staff and we ran transcripts next door to one another. And it was interesting because one of them actually even confused the person speaking. So the transcript, and when you got the AI readout of it, just had no weight in it whatsoever. That's the problem with the Teams one. 00:03:40 Speaker 1 Yeah, that's right. Teams is, that's right. You'd think that Microsoft would get this nailed, right? It's one of the worst. It is. It really is. It really is one of the worst. 00:03:49 Speaker 3 Flyify's actually does seem to be the best. It seems to be the one you've settled on. 00:03:53 Speaker 1 It is, personally. Okay, that's good to know. But if you think about it from a cost perspective, you go 30 staff at 30 bucks each or something. It's actually quite a lot of money. 00:04:02 Speaker 4 500 bucks a year. 00:04:03 Speaker 1 Yeah, per year, per person, right? Yeah. So yeah, it does add up, I guess. 00:04:09 Speaker 3 As the accountant in the room, it adds up. Yeah. 00:04:12 Speaker 5 I get, the thing for me, because I've been using it in the context of, going to a client for a day. Yeah. And interviewing. Sorry. You know, having eight sessions. 00:04:27 Speaker 1 In a row. 00:04:27 Speaker 5 In a row, yeah. And I can do it, I can just basically press record. 00:04:34 Speaker 1 Yeah. 00:04:34 Speaker 5 But I can also do it online. 00:04:36 Speaker 1 Yeah. 00:04:36 Speaker 5 And that's where I find it's, like everything else that I tried using, it was a real. real ball like trying to do it in person yeah true true um whereas if you do it and it seems to be able to pick up the different um speakers speakers and actors like and as long as what i did which i found really helpful was i'd go into a room and i'd say like i'm trialing this i don't know how good it's going to be um, Let's all introduce ourselves, and when you do that, then it very quickly allocates the different speakers, gives them the right name, summarises what they said, and all that sort of thing. 00:05:16 Speaker 1 Yeah, great. 00:05:17 Speaker 5 I haven't tried Teams, but I haven't tried... 00:05:21 Speaker 1 I think Teams tries to do that. I think meeting rooms are the hardest scenario to get AI to get it right, because it's called diarisation, is what that technology is called. It's where AI tries to take a single audio source and diarise who's speaking, and they're either trying to do it by the voice, or just naturally in the language of people talking, they can pick up the fact that I talk this way, or I say these words, or I'm stopping and you're asking a question and I'm not responding, they can, more just by the language. 00:05:52 Speaker 1 Just, you know, associate with a high degree of accuracy. Usually not 100% accuracy, but pretty good, who's speaking. So, yeah, anyways, long story short, I use Plaud often on my watch or I just put it on the table. That goes to an app on my phone, and I can also transcribe that way. 00:06:08 Speaker 4 But for the business, you've elected Fireflyers. 00:06:10 Speaker 1 Yes, but for the business, for our teams. That was really my question. Yeah, that was a long-winded chat. 00:06:14 Speaker 4 Because I don't want to trial 10 different things. 00:06:17 Speaker 1 Yeah, no, yeah. 00:06:18 Speaker 4 The fact that you've done it. 00:06:19 Speaker 1 We've done, yeah, we've done. 00:06:20 Speaker 3 Yeah, I would say we actually tried, what, four, five. 00:06:23 Speaker 1 I think I've done five, yeah. 00:06:24 Speaker 3 I think we've, like, since in the last 15 months, basically. So you can pretty much guarantee in the last 15 months, what came out 15 months ago, we've tried it, know what's worked, and we're now on that next stage. 00:06:37 Speaker 1 When I build my own, I'll let you know. Because the reason I say that is I saw a trend. Actually, someone in financial services has built their own as a SaaS platform. But, you know, the difference is that because they're a financial services company, when the Five Flags transcript comes out, it's just, a little bit nuanced that business it's not generic it's like by the way your client said this and here's the advice I should you should give them and for you know because it's being tailored to the industry so that's where you almost could take fireflies from the level in context of this chat we could actually. 00:07:07 Speaker 1 build what we could either build or imagine a tailored fireflies just imagine what that could look like if in Kui it was similar cost or slightly more because it's better but you know when you're having a legal meeting you it's got it's got a legal flavor to it for your business and it it even can tap into the knowledge base we might build one day and all the other things you start thinking holy moly yeah we can have our transcript on steroids have you have a meeting and it builds a proposal for you an hour later because it's already it's got the orchestration part sorted you know I mean all that kind of. 00:07:37 Speaker 1 stuff could potentially use fireflies for now in short, But yeah, I guess if you're going to buy a one-year plan, then you've got a one-year roadmap potentially to replace it or go month-to-month if you think it's going to be faster than that. 00:07:53 Speaker 3 So can I just, sorry, just to bring us back on to focus. 00:07:56 Speaker 1 Yeah, that's it. I was done. I was done. 00:07:59 Speaker 3 Have you invited specific people to the first stage? That's what I wanted to establish. 00:08:03 Speaker 4 So what we'll do, we've got three stages. I'll do a quick round of intro. So online we have Kristina, who is our project support team lead. She's joining us from Wehle. Roxy is also project support. And project support are the people who basically do and coordinate the invoicing. So they're invited for this section. Excellent. Matt and I, you know. 00:08:37 Speaker 4 We've got Karen joining us for the proposal section and then Matt and me for that last section. 00:08:43 Speaker 1 All right. Yeah. 00:08:44 Speaker 4 So Christina's been in the business for five years. I think she could do the invoicing process in, yeah. The tricky bits, the easy bits from beginning to end. So I'm pretty much going to direct you to Christina and Roxy for this first session. 00:09:04 Speaker 1 Yeah, awesome. 00:09:05 Speaker 3 No worries. I guess, so just introducing myself because I haven't been here. accountant by trade, actually ex-KPMG originally, started out as an auditor, but I'm now their finance and commercial manager. But I've just spent the last 15 months basically being their test pilot, crash test dummy, whatever you want to call it, which has now allowed me to make my team way more efficient, redirect our resources, and also redirect some of my. 00:09:39 Speaker 3 resource, which has then allowed us to tap into my background, which is obviously audit business process, that sort of thing, which is actually a really good skill set to line up with what we want to do in this sort of thing. Where I want to, my first number one question for you guys to help us direct this conversation is, in terms of the invoicing, At the end, are we, so at the moment, my understanding is all your consultants basically do their own invoicing per se. 00:10:12 Speaker 3 Is that correct. 00:10:13 Speaker 1 And that may be where we start. Because I wasn't 100% sure what the current status was. 00:10:18 Speaker 3 Yeah, so what's the current status and where do you want to get to is really what I want to understand before we drive the conversation. 00:10:27 Speaker 4 And I'll hand that over to Christina. But before I do, the one thing, this piece of the project, so we've got three key things here. This is our smallest piece. And the reason we're doing it is because it's a quick win that will hopefully get us a little bit of buy-in. It's not going to save us fortunes, a couple of hours of consultant time once a month. It's not one of those big things. So we definitely don't want to overcook it. But it's one of those things that will just get some buy-in and start getting people. 00:10:59 Speaker 4 Using AI across the board. 00:11:01 Speaker 6 It's a complete warning. 00:11:04 Speaker 1 All your consultants have to do the work for reading, and they don't want to. 00:11:09 Speaker 4 No they do want to, there's one component. So I just wanted to put it in perspective because this is our short one. 00:11:16 Speaker 1 So in Matt's words it's a ball ache. Yeah he wants to get rid of the ball ache basically. 00:11:23 Speaker 4 And then I'm going to hand over to Christina. 00:11:25 Speaker 1 Awesome. 00:11:26 Speaker 7 I was just going to say it's a very, very manual process. At the moment it's a word template. We use ProjectWorks as our project management software, and it doesn't have a great approval flow really. It's not like you have some packages, you can create an invoice and then it'll trigger off an email to somebody else who will then be able to approve it. It doesn't really do that, it's quite manual in itself. And also I think the consultants, or the way it's been done is that it's... 00:12:00 Speaker 7 they have just their invoicing on a template and a separate little table for each job and it also provides a few different areas where it tells them the budget, it tells them how much that has been invoiced to date and how much time has been invoiced to date, not like expenses and stuff, and it also shows them the previous month's invoices, the notes that they've put on their invoices and then they then go and look at the job, look at what their time-sharing entries have. 00:12:31 Speaker 7 been which are usually pretty bad to be fair because you know the project manager itself knows what the notes are that nobody else can really understand them and then we use together, their own notes to go on the actual invoice to be sent to the customer which then has to go through an approval process so it's very manual and it's very manual for us to update, for the consultant to update and I just think there's got to be. 00:12:56 Speaker 5 a bit of a way to get away before that. 00:13:00 Speaker 4 The consultants are working, they enter a timesheet note. 00:13:04 Speaker 3 Into Project Works. 00:13:06 Speaker 4 Christina, so you're just, back to the beginning, you're actually extracting those notes from Project Works, putting them in the Word document? No. 00:13:17 Speaker 7 Where are the notes coming from? We, the first thing they'll do is if we provide them with it, they'll go onto their invoicing team to make, they'll choose a job, they will look at their invoicing notes and weave it together into what they want it to say to the customer, manually type it in. Then we manually copy that into Project Works. But we also say the previous month that they have put in, so that they know they're not... 00:13:44 Speaker 3 So you're doing construction progress billing, basically. So you're doing progress billing. 00:13:50 Speaker 5 No, well, yes, but... 00:13:53 Speaker 3 Oh, no, we bill from the time we work. Yeah, but over a period of time per month. So the client might want to actually track where you're at, or is it just month by month? It's isolated. 00:14:06 Speaker 5 It's more that our invoices are bespoke to what we've done for the month. And we need to, the notes have to be sufficiently detailed to justify, like, you know, what the amount is that we're invoicing. So we can't just send an invoice to a client for $15,000 worth of, like, you know, stuff we did this month. 00:14:26 Speaker 3 And it's not that they want to actually track it, they just want the knowledge of what you've actually done. 00:14:31 Speaker 5 Because a lot of our jobs are, most of our jobs are project-based, so they have a, you know, like, it's like we're delivering something. And it might be, let's say it's a business case, it might be... anywhere between $30,000 to $70,000 or there or thereabouts, sometimes bigger, sometimes smaller. And you've got, you know, we bill them, the first month we might bill them $10,000 or $15,000, but we haven't actually delivered the business case yet, so we have to justify what we've done. 00:15:02 Speaker 3 That's what I was trying to get to, because obviously I was trying to work out if you're full construction type progress billing, so you need that knowledge to carry forward. Because what I'm already hearing is there's no reason why, and that project works when the engineers, the consultants, sorry, actually do their original timesheets, right? Yeah. Do they put in pretty good details in those notes. 00:15:27 Speaker 1 Well, very, very variable, right? Because that... And match the consultant together. 00:15:32 Speaker 3 Yeah, so... 00:15:33 Speaker 1 He's one of the stakeholders in this. As a consultant, the one doing the work. 00:15:36 Speaker 3 Yeah, so essentially, though, that note could form the whole... The whole basis of the event you're working on. 00:15:45 Speaker 7 I think if people knew that it could automatically reform that way, then they would put much more detailed notes in, but at the moment because they know they're the ones who are going to have to weave it anyway, it doesn't require it to be quite as detailed. 00:16:02 Speaker 5 Christina, would it be fair to say that, in my experience, if I'm the project manager on a job, because there will only be one project manager on each job, but there might be multiple consultants, I'm more likely to put more detailed, hourly or time-based notes. notes in my timesheet over the month because I know that I'll have to use those to write a. 00:16:27 Speaker 3 So you when you're doing your invoicing you're actually as the manager You might have multiple consultants working on that some projects So the one invoice is basically a combination of all of those. Yeah, okay, so that's really easy to automate. 00:16:40 Speaker 1 Yeah, they well like as you saying the consultants do average notes But the project managers up because the cannibal fallen what's on the invoice so they would be the one it it's a bit of an Assumption so it's in their best interest to do good notes Yeah But the consultants are just not doing great notes because because it's because time shading is, So they always do I did eight hours and then there was nothing no. 00:17:02 Speaker 5 I mean everyone is everyone has to put in what they did, but they'll do but, It's quite, it's usually quite minimum. 00:17:09 Speaker 7 The full stop. Right. And manage to stop them from just putting a full stop as well. 00:17:14 Speaker 1 Oh, is that right? But then the project manager, so you would be kind of aware of what's going on, so you almost times you on behalf of consultants, is that what you're saying? Well, when you get to the invoice, you have to fill in the gaps. 00:17:24 Speaker 3 And he's pulling it all together, right? So the end result is basically pulling all the info from the other people together. 00:17:31 Speaker 1 Yeah, makes sense. 00:17:31 Speaker 3 So there's no reason why we couldn't automate all the feeds and make it into one transcript, which then becomes the basis for their billing. 00:17:41 Speaker 5 You're basically having to triangulate between your, like what you did last month, right? Yeah. As a sort of like reminder of like what we've already billed for. The WIP, which is the list of the timesheet that's got, you know, a consolidation of all of the time that was. booked on that project for the month, and the notes, and the scope of what you are supposed. 00:18:13 Speaker 5 to be doing for the client, and what are the more macro tasks that you know that you have done during... 00:18:22 Speaker 3 The AI could even actually identify what has it is left to do. 00:18:27 Speaker 1 I was just going to say... 00:18:28 Speaker 3 So it could actually make it even smarter. 00:18:30 Speaker 1 Think about an AI which can read the statement of work, and then can read the notes, and find the gaps, and help the project manager make great notes for their voice against what's being done, but also help you to correlate against statement of work. So therefore, your statement of work needs to be really, really good, either customer facing or internal versions of that. Because if you're building a statement of work that's not just for humans, but for AIs, think about like yeah we should actually go through a process as well yeah so the. 00:19:02 Speaker 3 statement of works is done by the consultant the head project manager yes. 00:19:07 Speaker 5 it's a like it varies depending on how your client is but it's generally we've got a pretty detailed proposal which we then would translate into a into a. 00:19:19 Speaker 1 contract okay all right this is the so this is a invoice template is it yes it is mostly black and it's multi-page is that because. 00:19:31 Speaker 3 there's multiple pages with what they've just described date yeah yeah so these. 00:19:38 Speaker 7 are all the tables for each particular job it is. notes in blue are from the previous month, this is the current, this is the invoice that has just been, the notes have been done, and in the bottom we've got how much they forecast, the total budget, how much has been invoiced to date under the PDS. And you're putting on that sheet manually from Subject Works? Yes. Every one here is manual? Yeah. 00:20:05 Speaker 5 And we're also putting in the time up the top, right. 00:20:10 Speaker 3 We could also work that out from the timesheets. I can read that through. 00:20:15 Speaker 5 Yeah, we fill that out and the disbursements as well. 00:20:19 Speaker 3 Yeah, I've never used Project Works. 00:20:22 Speaker 1 There's an API. So one question I have is do you care if it's a word template in the end of the day or do you want, because an alternative could be that we essentially build like a, Minor little front-end which ingests reads and writes data to project works or reads data from project works Yeah, and formats it in the same way. You currently have it, but just. 00:20:45 Speaker 2 Okay, okay nice But I have I have tried playing around with sequel queries I have to get stuff into Excel. Yeah, and then from Excel I do a mail merge into the Word document and, There's a couple of things that don't work. So I found other ways of doing it But I don't think I think if we could get it into an Excel or something We can then extract that and put it into whatever format we want. 00:21:19 Speaker 2 But it's about getting that information off of ProjectWorks and having it then automatically populated in the web document. 00:21:28 Speaker 7 We're not trying to do power queries and things, but it's quite, like there is actually on the website of ProjectWorks, they do have a list of all these schemas, all these different bits. But I've found it quite difficult to get the amount of time that's been invoiced, not just the total net of GST invoiced, because we want to know the time, not the disbursements and everything else. It's just putting all those bits together, and they're all quite separate and different. 00:22:02 Speaker 7 And then it becomes such a big table, the detail goes too big for me. 00:22:06 Speaker 4 While you're doing show and tell, can you also show the invoicing spreadsheet? Because I think that should be part of the solution. Yeah, that would be tracking your money side of things, correct. 00:22:17 Speaker 5 Yeah, before you do that though, maybe, while we're on this, can you start with the WIP, you know those PDFs that show the WIP. 00:22:28 Speaker 1 Interesting. So you've got PDFs. 00:22:31 Speaker 5 Which must be an extraction out of Project Works, right. 00:22:35 Speaker 3 I think the WIP you can get as a CSV. I was going to say, I bet you can download it as a CSV if you can do it as a PDF. 00:22:43 Speaker 5 But if you just show a project-based one, you'll see what the data looks like. 00:22:50 Speaker 4 Hang on a second. Let me find one. I think the show and tell is important. 00:22:57 Speaker 1 It is really important. Because we essentially have to figure out what we call an as-is process, like what's the today. And then when we design what it will be, there's obviously numerous variables and a number of ways to do the same thing. We need to understand what will not change. So you're not going to change putting data into Project Works. You're not going to change ABC. But what will change is the part in the middle. The end result is an invoice to the customer that looks like ABC in this format. How do we get it from there to there? 00:23:28 Speaker 1 It's faster. And very likely, it'll need some sort of API, some sort of data transformation. But we don't have to use Word. We can print it to HTML, which then go to a PDF that looks the same as your Word template. And all the data can be ingested from previous months and current months. And whatever we can get out of the ProjectWorks, we can actually build an algorithm to do it all. It's just about that rulebook, the ingredients list, if that makes sense. And as long as the data's there, I think we can build it. 00:23:59 Speaker 7 And we'll need to go back to the... 00:24:01 Speaker 1 If that makes sense, yeah. 00:24:02 Speaker 7 So we can raise the invoice. Is that Word or is that Excel? This is what we provide to the consultant. It's an invoice breakdown report. So this has got their comments, which will be their timesheet notes. Yeah. 00:24:14 Speaker 5 Well, we summarise those, though, right? We don't... 00:24:19 Speaker 3 Where have you prepared that document before you PDF'd it? It's on Project Works. So that has come from Project Works? Yeah. 00:24:29 Speaker 7 Yeah, if you go onto Project Works... 00:24:36 Speaker 3 He's got it in Word for us. So there's all sorts of info in there. It's about extracting it correctly. 00:24:41 Speaker 1 I've got the API here. So I can pull out timesheets, jobs, reports. 00:24:47 Speaker 2 I tried fiddling with the API, but what I couldn't do was... It didn't have data that matched, so you couldn't link the reports to the forecasts or the invoices to the expenses. So the data that was coming out, I couldn't work with. Okay, okay. Which is why I looked at the... All right, so... 00:25:06 Speaker 7 what we would do is this has already got wording in it because it's been provided to me but normally it would just say professional services and through here this is where you choose whether you're gonna this is the breakdown that we provide which they will then in that template put in their words that they want which really then copy and paste back into here. 00:25:26 Speaker 5 but i guess what we do what the manual part of it for us as consultants is that we don't just like copy and paste all of those those notes because they you know a lot of it's kind of like, you know it's either stuff we don't want to be telling the client or it's not doesn't make sense in the context of what we've been asked to do so it's kind of like taking like for argument's sake and then there might have been 30 different hourly inputs in there separate inputs it's taken in and. 00:25:57 Speaker 5 go summarize that for me in five bullet points right yeah that's the part that we have to do, Yeah, we need a language model that does that for us, to make it more efficient, because that's the thing that you go, oh my god, it's the first of the month and now I've got to go through all of these things and summarise all this stuff. 00:26:18 Speaker 3 It's a really good statement of works, right? And we train the model to basically compare, to bring in all of their notes and compare what's actually done. The model would almost do half of the work for them, right. 00:26:33 Speaker 1 In terms of, yeah, so are we talking, we're obviously talking about multiple things here, but you're talking about the actual timesheeting function as well. So for you as a consultant, obviously there's many parts to this process. One is the invoice creation, which is an output, but an input is the actual consultant's notes. So are you typically doing, or is everyone doing notes once a month in timesheets. 00:26:56 Speaker 5 No, no, we do it daily. 00:26:57 Speaker 1 You do notes daily? Yes. Okay, you're doing your notes and you're doing time sheets into ProjectWorks daily? Or every other day. 00:27:05 Speaker 5 Three times a week, or once a month, weekly, depending. 00:27:07 Speaker 1 But you're inputting those notes into ProjectWorks as time sheets. 00:27:11 Speaker 5 Yeah. 00:27:11 Speaker 1 And then, so then, just to clarify, at the end of the month, there's a process where, you essentially reformat all that, so it's customer friendly, is that summarising? Yeah, basically. 00:27:23 Speaker 5 Yes, no, we transform it. 00:27:25 Speaker 1 You transform it. So you might have done, call it, 30 things in a month, and that's 100 hours. 00:27:34 Speaker 5 Yeah, to five main things. 00:27:36 Speaker 1 And there could be lots of notes, scratch notes, and it could be kind of not there. 00:27:41 Speaker 5 We very much don't want to be giving our clients the breakdown. 00:27:45 Speaker 1 And is that why you don't bill? No, it's similar to what we want to do from the end times. So you don't bill out of ProjectWorks, or you create an invoice in ProjectWorks, but you don't send the invoice out of ProjectWorks? No. Okay, so yeah, so what we do... 00:27:54 Speaker 3 It's the same concept. Hold on, stop. We do? It does, but only after you've made it look exactly how you want the client to see, right? So it's the same concept that we're... 00:28:07 Speaker 5 So what's the Word document for? That's for... The Word document is to capture, like, the consultant's, like... It's pulling things together. Yeah, like, basically, narrative around what was done, the amount that they want to build, because we don't always build the exact amount that we've charged up to the job. So we need to be able to have a manual override to say, no, I'm not charging 10 grand, I'm charging 8 grand, because that 2 grand was, you know... i don't know we'll we'll charge it later because it's work that we're going to charge as part of. 00:28:39 Speaker 5 another phase or you know we're going to write it off or i don't know yeah do you know what i mean like we have to have that manual override and we also don't provide that breakdown of like we did. 00:28:48 Speaker 1 this many hours i see so your project works invoice is more i call it a simple a summary, and then now and you have a word document like a supplementary word document so they're both the numbers will match dollar dollar for dollar but the word document is multi-page lots of notes is that kind of what it is no no the word document is is what we use to to bring it all together. 00:29:16 Speaker 3 right so it's basically the central brain where they're putting in the time they're putting in the work that's done they're putting in what's outstanding they're putting in what they did last month, And then they're putting that all into one document so the end user can see it. So the word is the customer. That's then approved, and you guys then fine-tune it, right. 00:29:41 Speaker 2 The consultant uses the Word document as well as the invoice breakdown to come up with the five bullet points that go onto the invoice. 00:29:51 Speaker 1 But the customer will never see the Word document. 00:29:53 Speaker 3 No, but it's the hub of bringing all the info together, right. 00:29:58 Speaker 5 It's our means to summarise and tell the story about why we're charging them $10,000. 00:30:05 Speaker 1 And so just to reinvent the whole process, potentially, if we removed the Word document today, what would break? Is there another way of doing it that you think could be possible. 00:30:15 Speaker 7 People would have to actually manually go into Project Works and everybody would have to write it themselves what they want to do. 00:30:22 Speaker 1 Are they doing that anyway? Putting time in? Maybe I'm missing something. 00:30:26 Speaker 5 Well the difference is that, so my time today, right, I will do a job and I will do like an hour on a model and I'll say, I'll just put cost model review, right? And then tomorrow I might be report writing on the same job and I'll go drafting report and all that sort of stuff. But then when I come to the end of the month, I don't say like, you know, when I invoice, I say, you know, drafting of report for blah, blah, blah. 00:31:05 Speaker 5 You know, like in terms of, you know, for like a material recycling facility RFP. Yep. And then I'll say cost modeling. cost modeling and cost modeling review for the same job like I've got to put more I've got to put the flesh around the bones about what what it actually is that we're doing for the client. 00:31:27 Speaker 3 is that info that the flesh around the bones am I correct that info is already on the statement of works primarily it should be yes right so essentially what like if you think about like what our boys do right when they do like a firewall there's about five steps that go to a firewall I'm really simplifying it right what these guys are trying to do here is break that five steps down into two so the client only sees two steps but they've actually come noted all five yeah they want to summarize the five into the two that lines up with the statement of. 00:32:00 Speaker 3 works yes because that's what the clients expecting to see on the invoice. 00:32:05 Speaker 1 The only thing I'm missing, and I'm so sorry, I maybe, my brain. 00:32:09 Speaker 7 With the table we provide, or the multiple, every person gets their own Word document that has all their projects. Because people can be on like 10 or 12 projects at a time. 00:32:20 Speaker 3 So they might have 12 of these. 00:32:23 Speaker 7 So we kind of consolidate the information so they see the budget, they see what the forecast is, they see what they've already invoiced all in one spot. So they don't have to, because in Project Works it's on different tabs. It's like bringing it all together into the Word. 00:32:39 Speaker 1 So what I'm trying to understand, yeah, I think I understand. So your Word document is essentially a workaround. Yeah, yeah, that's what, if I was to summarize it right back, you use it because Project Works isn't... Too slow or something, It's it's a it's a mechanism to it's a mechanism to to help a consultant, Managers, but the reason I say this is if we develop a new system or what it looks like We're essentially going to replace their word document system altogether, right? 00:33:09 Speaker 1 And I really want to understand the purpose of that so that we can do it in the most efficient Yeah. Yeah, so as an example what I'm thinking is what if we had an interface, Which did all that for you and brought all the projects for like and just that so that you as a consultant We can sit down with you and you say what's the thing if you had an application which is essentially like we've done this ourselves And our own so we've a system called connect wise. It's the it's the world's biggest IT management platform. 00:33:40 Speaker 1 But it's the world's crappiest piece of software. It's it's like it's not crappy What I mean, it's like it's designed to be a very big engine a great engine It does a lot but it designed person who had made it, did not think about the user. Like we have to go in and out of like 100 tabs to find one piece of information. So we've essentially built, like we've built and building, little workarounds as well. So I've got a system where when my guys drive their car, they, it's GPS tracked, and then I built a little dashboard. 00:34:12 Speaker 1 that tells them they drive from this location to that location, which ticket did you drive on? They can click it and click timesheet, done. The whole thing like abstracts away from having to go into a job and remember that I drive at 9 a.m. to 10, all that, they just look at a single sheet, and they see that I can drive from these places, ticket one, two, three, four, five, six, seven, eight, nine, go, done. And like that's the same idea as abstract away from the really. Clunky UI like we need the clunky UI because that's ultimately the engine which we log the time on and generally invoices on if I'm understanding this. 00:34:47 Speaker

1 Now yeah, so the word document essentially is an internal tool not client facing It's an internal tool to help a consultant be more efficient, Track yeah summarize the work and then the information that's seen on there is useful previous jobs You should choose on whatever whatever so if we were to build an interface We would want to basically replicate the word document information So everything is there, but ultimately if we can pull it from the API we could essentially fetch everything in real time. 00:35:18 Speaker 1 So that I can so much when I really hone it on a design that makes good sense for you guys And you could essentially I imagine never go into project works you would just have your own, Timesheet or maybe we could even add like a button for voice notes And you say I Do This this boom it translates from front of you writes a beautiful note, And then you click save, done. Something like that. 00:35:41 Speaker 3 This can actually then feed into the next thing on their list, which is the proposal writer. The interface could use that as well. 00:35:49 Speaker 5 Potentially. I guess from an invoice perspective, the main thing to understand is that that's really important to us, is that I don't see a situation where we can ever be, where we ever really want to be fully automated because we want to have that control over like, hey, we're kind of getting into a world of value invoicing. 00:36:14 Speaker 1 Yeah. 00:36:15 Speaker 5 We don't, we're not wanting to see now that maybe just 15 and a half hours this month. Yeah. We did this thing. 00:36:23 Speaker 1 Which is worth this much. Yeah. 00:36:24 Speaker 5 And it's worth this much. And so we need to have that like, it's kind of like if AI can get us 80% there in terms of the narrative about what we did. 00:36:33 Speaker 1 Yeah, it's great. 00:36:33 Speaker 5 And then we can just go, whether we type or talk or whatever, it's irrelevant. 00:36:37 Speaker 1 Yeah, yeah, of course. It's just important. I think that's awesome. 00:36:40 Speaker 3 We've been having the same conflict within our company, right? Because these boys who are so AI-focused, want to basically automate all the information from our boys, our engineers, and give it to the clients. Now, me and the directors are like, there ain't no way this is ever going to happen while I work for this company. Like, literally, I've thrown my toys out of the cot over it. Have I not? Yes, I have. I've literally thrown... And so there's no way. So we're challenged with the same thing. I know they can do it, 00:37:11 Speaker 3 but I also know if you give that information to my client, I'm going to have so many collection problems, it's going to drive me nuts. So the point is, what I've done with them is I always insist that everything they build, a human has to check it before it's sent. 00:37:27 Speaker 1 So we can automate all the inputs. 00:37:30 Speaker 3 Even this input, yeah, into this dashboard that I think we could build that will solve both of your problems. Um... No matter what, if you're using zero, so like what we do, is it goes from all of that, then it goes to zero, nothing leaves zero without me looking at it first, and that's my check. 00:37:52 Speaker 2 In terms of, I'm just thinking about the, so the consultants do need to see the timesheet notes. Yes, but the client doesn't. Yes, the client doesn't. I was wondering whether there could be a way to make it easier for the consultants. to put those timesheet entries into AI, so that there's a suggested invoice description. Yep, yep, and then they just review it. Consultant can just check it and if changes need to be made. 00:38:19 Speaker 1 Yeah, what I would actually be doing is not even needing you to go into AI, I would have that built into the platform. So imagine if you're seeing an interface, yeah, imagine if you're seeing an interface and you click job, new time entry, and you start typing, you click a button and right in front of you, it should just be like, it could either reformat it into bullet points, you could even have it

check against the SAW, and you can imagine, whatever you can sort of imagine being like a beautiful, simple, but effective experience, 00:38:49 Speaker 1 I think we could build that. Because what I can see in the API just really briefly is we can pull timesheets from the system, which means we can likely pull last month's. We could display that on the screen. You could have an input box where you're typing. you could have a button which is like a little magic wand that you click on it and it's like trained as your notes and formats them in a nice bullet point you could even have like a you could even have like a recommender like hey i can notice that you did this last month and this month all these little things become make up the the what we call a prd a product requirements. 00:39:21 Speaker 1 document so we was we would really explore what are the most important things to you and i would be wanting to look at a document like the word document you've got this has been excellent understanding i found this on the web yeah thank you sarah you found from the web that's great um when ai talks back to you that's the weird thing imagine if the day five flies pipes up and says hey guys you got it all wrong here's how i should be doing, That would be a weird day, but I'm sure we'll have them one day. Hey, understanding your requirements is the main thing. 00:39:53 Speaker 1 And there's always multiple stakeholders as well. So as a consultant, what you see is maybe you, maybe you're seeing reporting, maybe you guys want to see something as well. So we gather all the requirements and we start to pull together what's called a PRD. This will be what we start to build, I think, after today's meeting. And also maybe need some additional meetings and stuff. But that's where I'm thinking now is that essentially we really want to go up to the North Star, which is how do we create efficiency for consultants and the team? How do we do that? Well, we've got this current process, which is clunky and it works, but it's slow. 00:40:26 Speaker 1 It's great. Just make it faster. 00:40:29 Speaker 5 The problem with the process at the moment, as I see it from my perspective, is that it's... Interrupts your your flow because every month you have to just down tools and do this thing because that we can't, As a business, we want to know, like, how have we done this month? Yeah, you need to make money. So we have, like, every business. You can't do it in your own time. 00:40:59 Speaker 5 You have to do it in everyone else's. We have to get everyone to do it. And so that we know by whatever date it is, like the 5th or the 6th or whatever, hey, these are all the invoices that are going out for the month. And this is how much money we're going to make and blah, blah, blah. And so that's what's – and if you've got 10 invoices or 15 invoices that you've got to generate, that's a real hassle. 00:41:25 Speaker 1 Yeah. 00:41:26 Speaker 5 Especially if they're not simple. If they're, like, you have to do – you go, oh, we can't build them that much because we haven't – we actually . 00:41:32 Speaker 3 Yeah. And that's why there's got to be that human underwrite on the dashboard. 00:41:36 Speaker 1 But I can imagine some kind of workflow. And, again, this is really Sunday night's camp here when it comes to the actual building. I can imagine – I want to tease out a workflow. But I can imagine a consultant's view. log in and you see all the work which has been logged and let's say you're the respond responsible you can either have some kind of wizard experience where you click and you go through a next process and that's like generated the invoice and there's AI in there maybe it's like click see all the invoices click a button it summarizes everything into five categories you say make it longer click it writes it longer yeah that it it up you can kind of. 00:42:08 Speaker 1 imagine that kind of experience looks great next double check the invoices approved next and that just shows the next one so maybe you're in like in one hour or half an hour and you just kind of one by one by one that you are you are super focused on it there's automations to help collate the notes and give you all the information you need to do your job aka creates invoice, but you just make it really easy in the interface you might see some kind of a, I'm just imagining what the experience could look like and just summarizing. 00:42:37 Speaker 5 summarize summarizing what what you've done yeah that's right so in the language that makes these guys are going to give the stuff, like that's just kind of help and they're almost like manual prompts for us to do yeah that's right exercise yeah and then does that takes you guys are. 00:42:53 Speaker 4 ages right doesn't it yeah I can imagine yeah a hundred projects that she's. 00:43:04 Speaker 2 different yeah and for each you know you get different information on different tabs so for each project you've got to go to the invoices and then you've got to go to the forecast to update the yeah yeah the word so it's very manual. 00:43:18 Speaker 7 I think if we just had one centralized thing doesn't matter what it's made of that just pulls in all the information that they need in one place provides what they were on the invoice last month by the writing summarizes this week this month, Or even like there's a tip, like it shows you the actual breakdown and you just tick which ones you want to do. 00:43:42 Speaker 1 That's right, yes, that kind of thing. 00:43:45 Speaker 5 Christina, why do we need to know what happened, what we invoiced last month? Because that was just what I wanted to ask you. Because I only use that as a prompt for what we're going to write about this month. Like it's not, we don't send it again and say this is what we did for you last month. 00:44:04 Speaker 1 It's more context for you when you're trying to... 00:44:06 Speaker 7 The reason for it is so that you don't repeat what happened in the customer campaign when you've already charged us for that. 00:44:11 Speaker 1 Yeah, that makes sense. 00:44:14 Speaker 7 So apart from that, because hopefully it's useful because I really hate doing that. 00:44:18 Speaker 1 Yeah, yeah. Okay, so it's making, I think I'm getting a clear picture now. The one thing I think it would be great to dig into a little bit more, and I realize we're almost at 10, would be if there are other stakeholder requirements here. As in like, let's say there's kind of two approaches here, right? We got, let's focus on an application for the consultant. So the consultant's view is clearly that maybe pull up the main experience here or the main stakeholder here, and we could have some sort of a job list, and then we pull data from ProjectWorks, 00:44:49 Speaker 1 and if you're tagged to it or whatever, we can do all that sort of stuff. The same, replicating the same experience logging into ProjectWorks, just abstracting in a way. But let's say, is there other stakeholders? Maybe is there another, like, would you like a view? Would you like a view? Would you like a view? Where you're logging in, you're maybe seeing everybody's report view. You know what I mean? Daily whip thing, like there's a magic. 00:45:08 Speaker 7 It's a kind of little approval process. 00:45:10 Speaker 1 An approval process. It's like. Yeah, fantastic. So maybe yeah, maybe there's like a button where you as a consultant you get to a certain period and you've approved but doesn't do anything other than it sends a, In the database and now it's flags it for someone else when they log in They now see the list of things to approve and they and then they're gonna need data as well They might want last month's invoice versus this month's and they might want ABC. 00:45:44 Speaker 1 And they might want ability to push it back to consultants or they might want to write. Yeah, Yeah, so it's almost like when we start thinking about custom software or custom applications or whatever We do need to think through those different stakeholders or we call them different, users or different user stories. So if I'm a consultant, I want to see blah. If I'm an accountant, I want to see da, if I'm a director. Like an EPIC. Yeah, like an EPIC, yeah, that's right. 00:46:08 Speaker 3 Is there any different flows into it other than from workflows. 00:46:12 Speaker 1 Other than timesheets. 00:46:13 Speaker 3 Yeah, other than workflows, or is that the only input so that we don't, there's not anything else coming in that maybe is not coming? Expenses. Oh. 00:46:23 Speaker 4 So there's the timesheets and then there's disbursements. Yeah. Which is just, we just, it's in Project Words. 00:46:29 Speaker 3 But it still goes on to the bottom of the invoice, right? Yes, correct. Okay. 00:46:34 Speaker 5 And then there's that overlay of like our transformation of like, so for example, I might, and I do this quite regularly, I'll say, well, I'm only going to charge them like, you know, this much this month because I'm going to, you know, I'm going to. Manage that extra, you know, like that additional amount because I'm going to put that into the base or something. Yeah. 00:47:00 Speaker 1 But that would be at a timesheet by timesheet individual level so that idea. 00:47:05 Speaker 3 You should be able to do that pretty well. So, you know how we do with Goldsworthy, right? How we've created that price calculator with Goldsworthy where you basically can go in and change it There's no reason why the same concept wouldn't work for what. 00:47:19 Speaker 1 Yeah, when I was just meaning by the timesheet I wasn't sure if this was how you mean But if let's say you did 20 timesheets and you could have the ability to untick five of them What would you be splitting an individual timesheet potentially as well in half that kind? Well, I'd see or is it just a dollar value. 00:47:34 Speaker 5 It's more intuitive than just yeah the time shooting it really if you From our perspective as a consultant is more to give you like you I mean you obviously have to bill it all if you can. Yeah, but it's not that, you. 00:47:49 Speaker 3 It's not like us, where every 30 minutes I want to find somebody to bill for it. It's not like that. It's a different type of concept. They more want to be able to override. So let's say the timesheet comes through and says bill $10,000 and he's saying, oh, I really only want to do eight. They just want to be able to override that to eight, right. 00:48:10 Speaker 7 Can I just interject though, that while the consultant can say, yes, just bill eight, Rossi and I... 00:48:20 Speaker 1 So there's more than one user, right? On the timesheet. 00:48:26 Speaker 7 So it is line by line for us. 00:48:28 Speaker 3 Yeah, and that's fair enough because you sit where I sit, which is wanting to make sure you get the maximum money for that month because you've got to pay the bills on the 20th. 00:48:36 Speaker 4 But also Project Works, if we just round it up and do a manual entry, it won't carry forward that two grand. We actually go and uncheck the timesheets. 00:48:46 Speaker 3 So we're going to have to track that basically through it. 00:48:49 Speaker 4 We uncheck the timesheets and try and get the very closest we can to that amount because, you know, if Matt says Bill 8 and the timesheets come up to, you know, $8,002, you've got to really do some wiggling to get it to that amount. So it's not just a simple override. 00:49:11 Speaker 7 If AI could figure out the timesheets to get to the closest. 00:49:19 Speaker 4 I think you can manually do it, that might not, but yeah it is. I think we probably could though. 00:49:26 Speaker 1 Probably, who knows. 00:49:28 Speaker 3 And then you would carry the other timesheets over to the next month so they don't get lost essentially. Correct. Whether we did it that way or another way, I reckon somebody would be able to find the things. 00:49:37 Speaker 4 Yeah, I mean that would be helpful. It's not just a, oh I'm going to charge age and bring two forward. 00:49:42 Speaker 5 Yeah, yeah, yeah, I get it, because you don't want to lose it. But there's a bit of tension here obviously. Yeah, I've got that. You know, internally, and Anna's the same, she'll be like, oh you haven't built this, she's our finance manager. And it's like, well yeah, but we can't have a whole bunch of people just writing down, oh I did five hours of this and then just send it off to the client and they just happily pay. We get pushback all the time. It's got to translate. 00:50:08 Speaker 4 There's not going to be a change and AI's not going to resolve that. 00:50:10 Speaker 5 No, no, no. But AI can help us go, how can we easily manage that process. Right. And make it as easy as possible. 00:50:19 Speaker 3 It is similar, once again, to that same problem that we're trying to solve with giving our clients... Our sales guys want to give all the clients all the information. The finance team are like, no. 00:50:30 Speaker 1 So we have that same conflict. Yeah, yeah, I understand. Yeah, there's a lot of interesting... This has been a great meeting. I know it's very much an introductory meeting. From here, I think... What's your thinking, Sunday? I know you've been sitting there quiet. I know you're a process... So Sunday's really an expert in very... She's a career automation specialist and business process mapper and also full-stack developer as well. So I've got one to punch there with Sunday in terms of being able to map a process out. 00:51:03 Speaker 1 And she'll be the one that does process mapping, and then helps translate the technical requirements. And then we can, obviously, as a team, can build any application or automation or a mixture of that. But yeah, so I thought I'd ask you a question because you might be sitting there wondering some... 00:51:17 Speaker 8 No, no, no. Stuff? Actually, one thing I want to ask, I realise you have business in New Zealand and Australia too. 00:51:26 Speaker 1 Oh yeah, that's a great question. Is this more complicated. 00:51:31 Speaker 4 Are we just doing New Zealand? No, it's all in Project Works. So both companies are in Project Works. Project Works does multi-currency. We have a project support person in each office. So Roxy's Auckland, Christina's Wellington, there's another person in Australia. The process is the same for all of them. So the process is the same, the software is the same. It's multi-currency in Project Works. 00:51:54 Speaker 1 And Xero or something? It's all in the same Xero? Or is it two different Xeros. 00:51:59 Speaker 3 So it's actually a different company. 00:52:04 Speaker 4 But the invoicing, once it's approved in Project Works, Zero knows, Project Works knows which Zero just approved. 00:52:10 Speaker 1 Oh, it's because Zero, Project Works supports multiple. 00:52:17 Speaker 4 Yeah. Perfect. 00:52:18 Speaker 8 Yeah. 00:52:18 Speaker 4 So it's all one platform. 00:52:20 Speaker 8 It's really just Project Works itself. So New Zealand consulting, we're consulting to Australia, so I'm just asking in process. 00:52:27 Speaker 5 No, we do do that. Occasionally. 00:52:29 Speaker 8 So how is that in New Zealand? If you're in New Zealand consulting, if you're in New Zealand consulting, it's out in Australia, it knows into your Australia office. 00:52:38 Speaker 4 It's the, wherever the project manager is. So if it's a New Zealand job and it's got a New Zealand project manager, New Zealand will do the invoices, so it's based on the project manager. 00:52:49 Speaker 3 Do you ever have people in multiple offices working on the same project? So you might have somebody in Aussie working on a project here in New Zealand? Yeah. Okay. 00:53:00 Speaker 4 That doesn't, it's the same. Same process, they do a timesheet, on the job. 00:53:06 Speaker 3 So you basically do the exact two processes parallel, one for the Aussie company, one for the New Zealand company. 00:53:14 Speaker 4 It's all one. It's all one process. 00:53:17 Speaker 3 But they get invoiced through different zeros, but they are identical. 00:53:21 Speaker 1 But it's out of the same project works. 00:53:23

Speaker 8 It's just synced different zeros. 00:53:28 Speaker 1 I'd imagine it's like us with ConnectWise, how we had two different zeros of lower north, but it's just the same project works, but it will support two different zeros. 00:53:37 Speaker 3 But it's the exact same process, exactly the same, all three offices. 00:53:42 Speaker 7 The invoices are actually here, the project works, and then exported to Xero, which is where the finance manager does what he or she needs to do with them. The invoices go from project works themselves. 00:54:08 Speaker 1 So have we covered off the crux of it, do you think. 00:54:15 Speaker 5 Yeah, I think from our perspective, it's probably worthwhile. You might need to dive into the PD process a wee bit more, but I don't want to talk too much about it. 00:54:30 Speaker 1 Is that project director. 00:54:31 Speaker 5 Yeah, well, that's sort of like at the end when we go like, okay, we're happy with that invoice, you know, that project has the right amount, you know, like. it's on you know it's on track yeah what I'd probably like to do at some. 00:54:51 Speaker 1 point and this could be split between us like it's literally sit with you for half an hour just watch your process sit with you for half an hour and just like go through one by one kind of one at once and then even maybe PDF there was it more than one PDF or is it just one yes okay so let's sit with them as well and just understand from everybody's perspective the different friction points or different pain points and then we can kind of wash up at the end and say all right the platform we're going to build is ABC it's gonna solve these challenges for these different people different roles and that way we get a holistic picture because no one wants to get half with your project and realize we've missed some critical you know requirements and yeah you know do or. 00:55:25 Speaker 5 something you have to remake something yeah totally and probably something that might help you is I'll tell you what I know that I've done a little bit of but other consultants have done more yes we've already started experimenting with taking those PDFs of all of that, you know like the time for the month and dumping it into um copilot and saying can you summarize. 00:55:47 Speaker 1 perfect perfect that's great yeah so essentially it's take it would be taking all that learning which is excellent yeah but as a developer we can essentially bake that all into a process yeah yeah. 00:55:55 Speaker 5 and and kind of abstract much easier i've already summarized this that's right you know yeah 100 that's but as a user that's what i want isn't that great like yeah check this check this oh hang on you missed the point point there that i need to highlight that's right yeah if you kind. 00:56:10 Speaker 1 of take essentially it's like it's an orchestrated process start to finish through what through through getting information out of um out of project works ai enhanced all along the way without needing to copy and paste in our systems just happen right in front of you in some sort of guided application and uh if we can achieve that with a simple interface that works that's really fast yeah i think that would be great yeah, Any other questions for you, Sandhya, or Roshan. 00:56:39 Speaker 3 My next question I think is actually going to be answered in our next session because I'm now thinking of the input into it. 00:56:45 Speaker 1 Should we quickly plan some potential next meetings? Like it would be great to have another meeting with you, just a little half an hour team so we can just organise some teams. Is it worth doing a session with both of you as well? Like another half hour we'd screen share, we go through individually or together. 00:57:02 Speaker 2 I think with Christina because she's obviously got a lot more experience. Yeah. Only five weeks in, so. 00:57:08 Speaker 1 Yeah. 00:57:09 Speaker 7 It's also good to get a new perspective as well coming in from the outside, so yeah. 00:57:14 Speaker 5 You definitely need their perspective and our perspective on this process. Definitely. 00:57:20 Speaker 4 Well, of course. Project support has the bulk of it. You know, while we say we're saving consultants' time, so sorry to the consultants. 00:57:29 Speaker 5 It's not all about the consultancy, but it is, it's like one day, it can be one day out of 20 billable days. That you have to do, yeah, that you're writing off in terms of... 00:57:43 Speaker 1 Yeah, wild, so that's actually not insignificant. 00:57:45 Speaker 5 Across like 30, 20... Potentially, and I'm not saying it always... 00:57:49 Speaker 1 Well, even if it was only half a day, that's still... 00:57:51 Speaker 4 You could have tried to do an RIO calculation. Yeah, I was actually already thinking... 00:57:55 Speaker 3 I can see your... I can see that. And earlier when we said it wasn't a big time saver. I think the important thing is to keep it as simple as possible. 00:58:03 Speaker 1 Even if it was four hours a month, like I said to people, it's 120 hours a month. 00:58:06 Speaker 7 Yeah, they're already gone. 00:58:07 Speaker 5 I'd say most people are invoicing, most consultants are spending about, probably on average, about four hours. 00:58:15 Speaker 1 So let's call it 1400 hours a year. 00:58:17 Speaker 3 Yeah. 00:58:18 Speaker 1 You know, that's again, it's a lot of time. 00:58:21 Speaker 3 But not only that, it's time that you can actually take back and use as billable time if we can just summarise all of that. And it might be as simple as, I mean, to make it really work and make the AI as good as it possibly can, the consultants are going to have to put in the good. Absolutely. If you don't put in the good, that's where I'm going. So there may be a little bit of behavioural change. 00:58:45 Speaker 2 I know that Karen and Dan are working on invoicing training notes. Yeah, cool, perfect. 00:58:53 Speaker 1 Are they someone we should be talking to as well in the practice process? Just to understand? No, no. 00:58:57 Speaker 2 No, it's just trying to encourage people to actually, instead of just saying meeting with clients, to be a bit more... 00:59:04 Speaker 1 Should we get their notes and put them into the system where when someone puts the notes in, click go, Dan said you should do this instead. You haven't met Dan's criteria. On page two, line three, he said... Yeah. 00:59:18 Speaker 7 But if people knew that their timesheet notes were going to be summarised for them, summarised into an invoice, they would be a lot more careful about what they write, because it has a purpose. Whereas at the moment, they can just write very basic, random things, and they kind of know what it means. 00:59:37 Speaker 1 Yeah, that's great. I think this is a really cool process. This could be quite a good process. It could save you time. 00:59:43 Speaker 4 It's an interesting one, because it's a very simple process, but it's very time-consuming for projects, very time-consuming for project support, and relatively time-consuming for consultants. So, yeah, we can definitely streamline, but I also don't want to completely overcook stuff, and this is a simple process, and this is our quick and easy way. 01:00:03 Speaker 1 Yeah, perfect. I think it is easier in the sense of, or easier is obviously subjective, but it's easier in the sense of... Yeah, absolutely. there's a slightly more defined start and finish time like we know what good looks like we know there's already a current process and we're enhancing that the other ones are slightly different there's more variables it's a bit more maybe um but also i think what will my gut feel on this one let's say we just fast forward six months or three months or whatever and there's some application you're starting to use it i imagine that like a couple months in there might. 01:00:36 Speaker 1 be a lot of i feel the light bulbs go off and go oh my gosh we we're now getting this data in real time or we couldn't before or at the end of each month like wow our reporting can be different now or we will probably learn things about what we can get out of project works and the nuance of what we don't know the gaps that you know because it's so hard to explain every little detail but what if like through the process we realize we can pull data out of this and then we go actually could you report on this you're getting that data anyway we've always struggled to get this done and it's like there'll probably be spinoffs if that makes there's already. 01:01:09 Speaker 4 a list of spinoffs okay. 01:01:10 Speaker 3 all right, Certainly through our experience internally, one of the things we've found is that there's little time savers that go into main processes that are really easy to automate, and they save wicked quick wins, and it's not a lot of work. 01:01:27 Speaker 1 Yeah, especially once you've got something going. 01:01:28 Speaker 4 One of the things we can't do in Project Works is run reports by sector or service lines. We've got different services. If we go into the forecast report, we can't just say, show me asset management. 01:01:40 Speaker 1 Right. Is that right. 01:01:41 Speaker 4 Yeah. 01:01:41 Speaker 1 Even though the data's all there, they just won't... Yeah. Okay, so we can build another whole thing around... 01:01:46 Speaker 4 A little quick win. Separate conversation. Yeah, future date. Because, A, it's 10 o'clock, and B, we just want to focus on our quick win with this. Yeah. Because, yeah, at the moment, it's two reports of the VLOOKUP. 01:02:01 Speaker 1 Okay. 01:02:01 Speaker 4 Every single Monday. 01:02:03 Speaker 1 Oh, right. 01:02:04 Speaker 4 But it's my time, which is non-billable to clients, so it's fine. 01:02:07 Speaker 1 Yeah, yeah. 01:02:09 Speaker 3 Yeah, but I need to be totally non-billable. That's automated, now for me. 01:02:14 Speaker 1 Yeah! I'm starting to, yeah, it's so good. Yep, now that's great. Thank you, Christina, thank you so much. Just take care. 01:02:24 Speaker 4 It's been fantastic, thank you. Yeah, yeah, definitely. 01:02:30 Speaker 1 Thank you, Roxy. Thank you. 01:02:33 Speaker 4 Does anyone need a coffee or a... I was about to ask.

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  00:00:24 Speaker 1 I was going to say, is there a colour that you're doing, a coordination? No, because there were three oranges and two of each other colour, so I had to eat the orange one. I'm not ADHD at all. I used to like it when I got the big, big boxes of strawberries. I used to eat all the red ones and not play with the other ones. 00:00:45 Speaker 2 I remember when they had that ad on TV years ago, eat the red ones last. Am I really showing my age now? They literally, the Smarties ad was, you eat the red ones last. In the 80s. Oh, God, I'm old. 00:01:01 Speaker 3 I freaked out when I found out that red food colouring was made from the shell of a beetle. 00:01:09 Speaker 2 Did you know that? All food colouring is terrible for you. You know those hundreds and thousands? Yeah. So I've got a bit of a dodgy bile duck, right? I went and had hundreds and thousands on a Sunday, the other day, at a restaurant. My bile duck screamed at me for two weeks. 00:01:28 Speaker 4 Oh, really. 00:01:28 Speaker 2 It wanted to burst out of my body because of the colouring. Oh, right. Hundreds and thousands. I don't know what's in it, but it ain't good for you. It is not good for you. 00:01:47 Speaker 1 Right, over to you, Chris. 00:01:50 Speaker 5 All right. So, we were going to be talking through how AI can help the org generate proposals and, digging into some of that. You mentioned last time you were playing around with Copilot and doing some stuff and you've already potentially reduced a bit of your own time through your learning, but we're thinking about how we... I guess there's two or three things here from me. Number one is I think we want to gain a better understanding of the types of proposals you're. 00:02:22 Speaker 5 doing, because for us to work or for us to essentially build a good AI system of what it could look like, I think we would need potentially some great examples of proposals, potentially example types, maybe in different sectors or different areas. And then we could talk about... the challenges of proposal writing today and some goals around the reduction of time or whatever. 00:02:53 Speaker 5 What does quality even look like? All those kind of things I'm keen to dig into. And then what could an end state potentially look like? I think last time we talked about again some kind of potential custom AI solution which you could punch in something and look at AI vending machine proposals. Punch something in and out comes a proposal. It may or may not be that perfect but I think the goal could be something like, it'd be great to have an all-star of what we're trying to achieve. So my thoughts were, I don't know where we start necessarily, but in my planning for this, it'd be great to map out the. 00:03:29 Speaker 5 current invoice workflow. Oh sorry, I'm reading the wrong thing. Here we go, we've just done that one. I did it around the wrong way on the proposal I sent through to you. I have work stream one as proposal generation. Different practice areas for proposal workflows. um what does quality look like what what is like what is your learnings around using ai already in proposal writing where is it getting it wrong or right because i think a lot of you know ai is garbage and garbage out so what does good um proposal inputs look like and i think we must. 00:04:03 Speaker 5 have at some point we should analyze past successful or great proposals so that we can train the models or teach a model or guide a model in writing good proposals do we need some kind of taxonomy or some kind of um um you know waste assessment strategic plans procurement and whatever the different you know um areas are can i just start a couple of quick questions. 00:04:26 Speaker 2 so how many proposals do you guys do a year lots like yeah i thought you were going to say a week, all right yeah a week how many would you do a week across the company. 00:04:41 Speaker 3 I don't know because it kind of weighs, that's why I kind of picked a year. 00:04:45 Speaker 2 And do you have an idea how many, no I don't know about it, so I'm going to have to decide. And what sort, are they like everyone's different or are they 80% similar. 00:04:55 Speaker 6 There's some standard text that goes in all of them. Okay, so there's a standard text. We've got a template, like our headings are always the same. 00:05:02 Speaker 1 This is our standard template, there's a couple of variations, obviously there's a landscape version and so on. 00:05:10 Speaker 2 So we've got a template and templates in Word. 00:05:13 Speaker 5 So the templates in Word in terms of like the actual structure. 00:05:19 Speaker 2 Are you quoting like all sorts of things or are they similar type things. 00:05:26 Speaker 3 Well there's commonality in the sense that it always, like you see those contents. We always put in like who's going to be, who we're going to do it. We always put in like a methodology. 00:05:43 Speaker 2 But in terms of what you're actually quoting, I'm just trying to understand what your actual business is. I understand that you're doing quotes for the government, but are you doing like, roading and then maybe weather, or are you doing only roading? Do you know what I mean? It's very varied. Yeah, that's what I'm trying to get to. Have you talked about the matrix, because that's probably... No, that's what I was going to talk about. Yeah, the matrix. 00:06:08 Speaker 6 So we have our business divided, not divided, but we classify the projects by the market they serve, which could be roading, could be borders, could be solid waste facilities. That's what I wanted to get to. That's the market. But then we have service lines as well, which is, is it a procurement job, is it a service review, is it a due policy. 00:06:36 Speaker 2 So within roading you could have different service lines, within waste you could have different service lines. So it's broken down. 00:06:42 Speaker 3 And service lines are more aligned with the actual, the outputs that we're, that we're doing. 00:06:47 Speaker 2 What you're proposing. 00:06:49 Speaker 3 Are we doing a business case or are we doing a review, you know, operational review or are we doing a, are we helping to procure a service or a piece of infrastructure. 00:07:01 Speaker 5 So your matrix is like market across service line down and you'd have, oh, here we go. Cool. 00:07:09 Speaker 2 Nice. 00:07:09 Speaker 1 So what we've got there is these are our service lines. So asset management, finance and economics, organisational procurement, policy and strategy programme, service operational review, strategic advisory. So those are our service lines. 00:07:22 Speaker 6 So a proposal for service review say would be similar regardless of which market it was. 00:07:29 Speaker 2 Yeah. 00:07:30 Speaker 1 and then so the markets across our service lines those are essentially the services that we do, um even within those there is variation not every asset management project is the same but then yeah it would slot into one of these markets this is across nz and aussie yeah so you. 00:07:48 Speaker 2 do work for aussie government as well as new zealand government uh we do yeah local government. 00:07:52 Speaker 3 local government local aussie and aussie is slightly different than it is in new zealand. 00:07:56 Speaker 2 because it's they have three tiers rather than with the federal with the states yeah so state government over there but it still fits in the same yeah it's the same concept yeah okay um so, there are similarities you can find them so and i'm guessing if you then go back to your project template probably, 70% of that is on all of them, and then the other 30% has changed, or have I... 00:08:28 Speaker 2 That's probably, if it's a standard project, if it's one that we've done before, yes. Yeah, so that's 70%. 00:08:36 Speaker 6 But the bit that changes a lot is the... 00:08:39 Speaker 2 The 30%. 00:08:40 Speaker 6 The methodology. The methodology, yeah. Or there's a heading there, our understanding of your requirements. 00:08:45 Speaker 7 Yeah. 00:08:46 Speaker 6 That's different for everyone. Yeah, yeah, yeah. We're showing our understanding of their context. The methodology gets tweaked from project to project, and then the track record is one that does my head in every time. 00:08:59 Speaker 5 Oh, really? Yeah. 00:09:00 Speaker 3 The track record is always the difficult one. Yeah, because you've got... 00:09:05 Speaker 5 Okay. 00:09:05 Speaker 3 Because we've been around for 25 years now, and we've done pretty much everything we've done before, you know? And so you want... Like, what we're wanting to demonstrate is... our experience but we don't like Karen and I don't know the machine knows. 00:09:27 Speaker 5 machine knows that sounds like a great thing we've done this, this for these people. 00:09:33 Speaker 6 we're trying to show you like three different record projects for each one but finding which ones are the most relevant. 00:09:40 Speaker 5 so in AI that's its own piece of work it's like how we build a track record system right that's kind of really cool. 00:09:48 Speaker 3 even if you could nail that the rest of it is kind of straight forward. 00:09:51 Speaker 5 yeah okay that's a really good thing to hone in on as well. 00:09:53 Speaker 6 yeah it is. 00:09:54 Speaker 5 because a prerequisite to getting track records is to get data and so then we start working backwards right we go alright this is great. 00:10:01 Speaker 3 because what will happen like sorry Karen but like, what will typically happen when I write one for example and it's probably the same but you can add to this, is that I will say to Ewan oh have we ever done this before and people are going oh yeah think about it, like five years ago or whatever, And then you'll go and do a search in a rough sort of like job number band of like, and do a search on a client or whatever. And then you'll try and you might actually find the job, but then you've got to buddy summarise it. 00:10:36 Speaker 3 Yeah, yeah. And you didn't do it, you know. Because you really, all you want is a short paragraph about what we did and what the outcome was. And that's basically it, right. 00:10:47 Speaker 6 And I have found Copilot is good at, it's hit and miss on finding the projects, but it is quite good at saying, you know, we've already, in the Copilot chat, we've already established what is important to this client and what this proposal is about. You know, here's some track record projects, but can you summarise them emphasising, like. in relation to this project. So I mean even when we've got standard summaries, there's still room for improvement to come out of this. 00:11:23 Speaker 6 What are we trying to emphasise on this one? And that comes within our understanding of your requirements section. No, that comes in the track record. 00:11:32 Speaker 3 Because you might use one project for three different proposals, but the different aspects of that one project are going to be emphasised across each one. 00:11:42 Speaker 6 So I know, I've told Kaupāna you have to, when it's finding projects, you have to read the whole report. You can't just go by the file names because they're not saved under this. So you've got to find the most relevant ones. Time is also a factor, right? There's a balance of how old is that project. 00:12:02 Speaker 5 Yeah, true. But I can imagine some kind of like, so when we think about data, there are... there are ways what i'm thinking about here is imagine a process where we sort of take a hundred documents or a thousand or whatever and we should actually do what's called like a pre-processing step where we could actually use ai to categorize tag pre-summarize yeah pull out key terms and that all becomes metadata yeah which then gets tagged against that so ai doesn't have to necessarily. 00:12:33 Speaker 5 read every document it just finds the you know what i mean so we actually have like a we can almost build an ai process instead which takes your documents creates a great set of metadata, around it maybe it pulls out all keywords maybe there's a maybe there's i don't know what it would be regarding you'd have to think about what you think about this together but definitely keywords, tags whatever maybe 100 word summary 100 maybe a thousand word summary maybe a whatever pre-make all that so then your ai is taking like much less heavy lifting and you can also say find me every. 00:13:04 Speaker 5 every proposal that's got the word waste management it's not having to summarize everywhere, again it just looks, programmatically at everything that's been pre-tagged and then it's already filtered down to the seven and then it summarizes those ones it makes sense So it's essentially trying to work with our data smartly to take the heavy lifting away, So that when you when an AI is trying to achieve a result, it's basically much faster much more accurate, These are the kind of what we call like a post processing or pre-processing step, So the data still lives on SharePoint, but you almost have this entire even they're like Netflix, right? 00:13:38 Speaker 5 It was with our experience is great. I just search for a word and it knows, producer or the year or the actors name yeah I don't have you know I mean like. 00:13:49 Speaker 6 it's already kind of in there somewhere doesn't make sense yeah what if we could. 00:14:00 Speaker 5 only yeah what if I could only search on title I would never find what I want right I want to search comedy I want to search Steven Spielberg I want to search 80s you know I mean like yeah so it's the same idea imagine that type search search engine across your proposals what if we built like this basically in this type of called metadata so we could use that metadata we can almost build a metadata library and then what if you could we get you do this sort of two reasons we could have you guys have a search like a Netflix and find me bubble but I know this searches your proposal documents really fast and easy. 00:14:31 Speaker 5 yeah click or something some sort of a whatever and or the AI could use it as well so I'm just thinking out this out loud, About this basically making a much more intelligent search engine than SharePoint itself. Yeah But also giving it more than one use case could be for humans and for AI. Yeah. 00:14:52 Speaker 6 Okay, okay. Yes, which is that's where I started using Proposals and I actually found that was quite frustrating and I had a lot more success using the project folder, Right, because those then it's building that track record based off the final report, Yeah, the technology is better looking in the proposals for what other proposals that we've written. Yes, Yeah, because it's like what you promised to do is what you actually did what was the outcome. 00:15:28 Speaker 5 Yeah, and then and there's probably report documents which you've written as well. So would one job end to end, Basically the original proposal, plus all the time sheet data and invoices you sent, and then probably some reports and assets that you made relating to that, all bundled in a single... 00:15:45 Speaker 6 So the project folder has the proposal in it. 00:15:49 Speaker 5 Oh, okay, great. So there'd be like anything, anywhere from two assets to like 10 or 15 or lots, potentially, depending on the project size. But yeah, that's excellent. That's really interesting. And is there some kind of, you know, set of like the outputs you're making? Are they also relatively standardized? Like it's a proposal, it's a report on something, it's a something like... 00:16:15 Speaker 3 There's different classes. 00:16:16 Speaker 5 Different classes as well? Do you sort of... I'm trying to think about tagging and categorization as well. Would there be like 15 categories or a thousand. 00:16:23 Speaker 6 It's probably in the different service lines, some are more standard than others. 00:16:28 Speaker 5 Yeah. So what if you could say like, find me every waste management something or other, and it just like... pulled the list of 10, and then you say, use those 10 to generate this, and it just like, does it quickly. 00:16:41 Speaker 3 Yeah, I think that would be the, that would be kind of, there needs to be sort of a filter. 00:16:44 Speaker 6 doesn't it, first off? Yeah, I think, certainly in procurement, there's some very standard documents. 00:16:50 Speaker 5 Yeah, great. 00:16:50 Speaker 6 Just update with the details, but then in the other service lines, it's more of a cut. 00:16:56 Speaker 5 Yeah, it's a super interesting idea. 00:16:57 Speaker 6 I think there's probably a time and time. 00:16:58 Speaker 5 I do think that sort of Netflix or Spotify type metadata searching is a good, a good picture for me, when I'm thinking as a user, what if, if your end result is a great track record, I'm trying to think backwards and be like, what can I, what does the user experience look like for you guys as you're writing documents? But also, how do we steer a model in the right way? And what does that all look like? And I think there's something in there which I would love to explore. 00:17:23 Speaker 3 The way you go about building a business case is pretty standard. It's the same as the way you go about doing an asset management plan. You can kind of tie a methodology to an output, to a degree. Would that be fair to say. 00:17:44 Speaker 2 I think so. So, I think so. What's the other really long... So, in terms of putting the proposal together, obviously one of your biggest pain points is the track record. What's your other big pain point from that proposal? Oh, the methodology. The methodology. 00:18:02 Speaker 5 Okay. Yeah. 00:18:03 Speaker 2 So how's that derived. 00:18:05 Speaker 5

Can we see an example proposal as well while we're ... Is there like one particular one that's ... 00:18:09 Speaker 2 Strike record is basically history, right? Yeah. So it's proving the history. So that's pretty ... 00:18:14 Speaker 5 But it has to be really relevant to the reader about what the work is and ... Yeah, yeah, yeah. 00:18:17 Speaker 2 But the methodology, I'm guessing, is very specific for what you're proposing, correct. 00:18:23 Speaker 7 Yeah. 00:18:23 Speaker 6 Yes, but there are similarities within the type of deliverable. Yeah. There are similarities. Having said that, though, ask Copilot a really interesting question. I've got it ... We narrowed down to a list of service reviews, which is a very standard thing. I would have expected this to be the same. But we narrowed it down to a list of track records or good examples of service reviews, and I told it, forget about the proposals, what we said we were going to do. Reading the reports, what did we actually do, because that can be quite different. 00:18:54 Speaker 6 Summarize the methodologies in each of these projects. Okay. What are the similarities and what are the differences and why did we do it differently? What did the client get out of it? And it gave me a fantastic table which I gave to Rotorua saying this is our standard approach to a service review and this is why and then these are some of the optional things that we can talk about adding in or out. 00:19:17 Speaker 1 Nice. 00:19:18 Speaker 6 I don't always go with that but it was interesting. 00:19:26 Speaker 1 One of the things we also can consider with proposals is that if we are using a Fireflies or a meeting tool, is that we can use that to populate so that our understanding of your needs, our methodology, because we're having a meeting, we're talking about your needs, and actually being able to use that transcript into the proposal as well. 00:19:49 Speaker 5 A hundred percent, that's excellent. It's a great asset. 00:19:52 Speaker 6 Along with some of our own research. 00:19:54 Speaker 1 That's right. Absolutely, yeah. We're never going to rely entirely on the tool, we still have to have jobs for us. 00:20:05 Speaker 2 Is the methodology, is there similarities along the lines, so the machine could somewhat pull up, say for example, and I'm just thinking like we're doing a waste job, we use this methodology on the last four waste jobs, and then is that similarity enough that you could make a summary for the methodology. 00:20:30 Speaker 6 Probably in the service lines rather than the markets, probably. Close. I guess my question is more, do we want to stick with the methodologies that we're using, or do we actually use Copilot to write a better methodology based on what we actually do. 00:20:47 Speaker 3 I think you need to do a bit of both, because I'm mindful that we could go down a potentially risky pathway with being sort of like... much revisionist and going backwards in terms of how we do things rather than forwards because it's like just going oh we did this the last 10 times we did this this is how we did it and it's like actually that might not be what what our clients need because we want to learn from project. 00:21:18 Speaker 2 to project on how to do it better true um i guess the thing is methodology is basically only one little paragraph i know that no that's not it i was going to just the most random i was going to say and you spend hours on one little paragraph what about that animal management yeah case one. 00:21:36 Speaker 3 um auckland council if you go to auckland uh three oh it's near the top um the shelter business case that one three eight proposal better be in there um hang on it's the it's that one uh hang on, Yeah, that one, is that a seven. 00:22:02 Speaker 5 It's a business case. Yeah. 00:22:03 Speaker 3 Seven nerve. 00:22:05 Speaker 2 How many people involved in the proposal writing. 00:22:09 Speaker 3 One main person. 00:22:11 Speaker 2 So it's primarily you, Karen. 00:22:13 Speaker 6 No, no, we all do it. 00:22:15

Speaker 5 Every consultant does their own proposals. 00:22:16 Speaker 6 Every consultant does it. Yeah. So there's always at least an author and a reviewer. Sometimes there's two authors. Okay. 00:22:23 Speaker 5 Ah, so there's always an author, a reviewer, and an AR reviewer. Yeah, so a proposed approach. And an AR author. Yeah, that's the methodology, right. 00:22:30 Speaker 3 Yeah. 00:22:31 Speaker 1 Right. 00:22:31 Speaker 3 So that's probably more normal, like, you know, like we've got five phases. 00:22:37 Speaker 1 Okay, so it's pages, yeah. Yeah. Yeah, okay. Basically five pages. 00:22:40 Speaker 3 It's different phases. And it's the phased approach, so we do, we'll do, so even having the bones of it are like, you know, this is a one phase, two phase, three phase kind of. yeah yeah project is probably quite helpful way like even if it's just sitting out like what that structure looks like I really like the. 00:23:12 Speaker 6 I really liked the idea of going, you know, if we've done this five times before, what would we do the same? What would we do differently? Yeah. What are the options that I've got for the methodology? Okay, rather than saying this is the... 00:23:25 Speaker 5 Yeah. 00:23:26 Speaker 6 What are the options for the methodology? Yeah. 00:23:27 Speaker 5 Such a great point, eh? Like, do we... Springing it all. But the outcome of this, do we really want it to be writing a proposal? Do we want it to be feeding information to help the person write the bit of proposal? Yeah. I think that's a different thing, right. 00:23:37 Speaker 7 Exactly. It is. 00:23:37 Speaker 5 Because it's one thing for us to go, write a proposal and watch it write for you, and you're going to go, uh, not sure. Right. 00:23:42 Speaker 7 Yeah, yeah. 00:23:43 Speaker 5 Another thing to have data, insights, et cetera, and maybe some kind of interface which grows over time, which maybe lets you build a proposal in front, like... Or you're straddling between two screens and you're copying into Word documents or whatever, and one day it's maybe all in one or something, but you don't have to go that fancy. You could have something which is more data insights driven, and maybe you click new proposal... I'm trying to think on the spot, like a sort of a workflow. Maybe you click new... client, or you pick the client, and then by clicking that, the AI knows the client, 00:24:18 Speaker 5 and you've already got baked in system prompts and whatever. I'm just imagining it out loud. Okay, you pick a service line from the matrix, and you click it. This is what we're going to be doing. Perfect. It kind of sets up the AI to know what this is going. All right, I want to build methodology. Brilliant. Oh, this is what I found. Click, click, and you're like, oh, that's awesome. Yes, that, or something. And you maybe have a little prompt, which you write. I love that one, that one, that one. Click on go, and it writes it for you. And you're like, that was damn good. Copy and paste. Exactly. I'm just imagining kind of like, it's a co-pilot. 00:24:50 Speaker 5 It is a co-pilot. It's not like the writer. It's like the assistant. How can we build a system which helps you write better. 00:24:57 Speaker 6 We can. 00:24:58 Speaker 5 And service information which is relevant to you, and gives you insights you can think of yourself, or just speeds up that process. 00:25:05 Speaker 3 Yeah. Because the hassle is. The hassle in this is not necessarily the writing of it. It's finding the back, you know. 00:25:12 Speaker 5 And that's a great point. I was wrestling with this thought too. Like, do we really want a click, write, rewrite, rewrite, not good enough, try again, no. 00:25:22 Speaker 2 What's important. 00:25:23 Speaker 5 Yeah. We almost want to. 00:25:25 Speaker 2 They almost need a knowledge base to some extent. Yeah, yeah, that's it. They actually have, this is what we did the last five times. 00:25:31 Speaker 5 It is like the AI intern, right? That's like right there for you. And so then us designing and fishing out what that looked like and how do we get to a great thing. And you guys must have used two screens, or some of you might have used three. Three. Yeah, three is great. So you might have a screen where you're in proposal mode, word document here, copilot here, and we need to figure out what that screen looks like. Yeah. And you're probably gonna have an AI application, which is your copilot, and then this proposal copilot, and then your word document, and between that, your writing goes from four hours to an hour, 00:26:03 Speaker 5 or whatever, right? Yeah. Something like that. 00:26:06 Speaker 6 Speaking for myself, I know what I want when I see it. 00:26:09 Speaker 5 Yeah, that's it. 00:26:10 Speaker 6 But it's quicker to go, no, yes, that's what I want. 00:26:15 Speaker 5 So it's all about really good filtering, really good data, really good insights, and so for us to do that, we might have to build our own Netflix library, basically, of your, you know. That's going to be an underpinning, because data is really, really important with any AI. 00:26:27 Speaker 1 And the tagging. 00:26:29 Speaker 5 The tagging category. I think that's a really big one. 00:26:31 Speaker 1 Before we launched Co-Pilot, I did look at doing some tagging on stuff, and I looked at it, and I completely overwhelmed and ran away, because I didn't have AI to do it for me. 25 years worth of very poorly filed stuff. 00:26:44 Speaker 5 Yeah. 00:26:44 Speaker 1 Our filing is not enabling. We're not enabling. 00:26:48 Speaker 5 Yeah. I think we would get more insights as we go through this process, but I imagine, if we not just tag on a document level, but what if we created tagging and really sophisticated tagging categorization on even a section-by-section level? So then we have a matrix of the types of documents, and the sections of every document, and then you're ready. Really, when you search, you're going to get excellent, you could potentially search what was the methodology I used on eight different blah, blah, blah. I'm just trying to imagine your experience. And we, I think the direction we'll know. 00:27:18 Speaker 5 where we want to get to. The nuance of how it looks and feels is very unknown right now. But I would love to flesh it out with you guys a bit more. 00:27:25 Speaker 3 I think the more we talk, the more it becomes clear. For me, it's exactly what Karen's saying. It's like, we get paid to write stuff, so we don't want to sit there and just watch. 00:27:38 Speaker 5 Watch it. Yeah. No, because that's taking your brain, right. 00:27:42 Speaker 3 We still want to have control over that. We still want to control the language and the message. I mean, even when I read something like that, it's like, I don't need. AI to write who we're going to work with I can write that but what I do would find help with give us the broad when we've done these business cases how we've broken it down into strategic assessment, business case development even like. 00:28:12 Speaker 3 give us a flow chart like that, a real simple one that we can then just overlay the specifics of this particular job, do you know what I mean like where we use this versus that. 00:28:26 Speaker 2 they want to be able to access. 00:28:29 Speaker 5 I think that's probably one of the biggest things. 00:28:32 Speaker 6 and I think one of the things that I think our proposals don't always do is. explaining or including, What our client gets out of us doing it, the client benefit, I think there's not a lot of that always in our proposals, and it's probably one of the things that we get feedback on. The why. 00:28:56 Speaker 5 Right. 00:28:57 Speaker 6 This is what we do, but why do we do that, and what do you get out of it. 00:29:00 Speaker 5 Yeah, there possibly is actually, as I think about that, there's possibly even... like the copilot type thing which helps you write the thing and then it could even be like an AI reviewer step which you jump the whole document in and it just does an overview wash and it gives you some here's our common best practices maybe we imagine if you guys wrote a rule book of 50 golden rules on any proposal check AI just washes it and goes cool it looks pretty good but there's three recommendations again not telling you to. 00:29:31 Speaker 5 write it just telling you something and you go back to your document you go oh yeah I probably should have written cool yeah now then that version goes to your internal reviewer and it's just an you know I'm just thinking about your process like he's probably a couple of use cases they're very weak centric at the moment yeah right right outcomes the other thing while I'm thinking about it. 00:29:49 Speaker 3 sorry it's a bit of a that's okay that's yeah my brain, This stuff, you know, like if we scroll down, like from here, so we've got this down, this is our methodology, what this ultimately feeds into in terms of our process is that we build up our costs based on these phases, and we do that using a standard, like a really basic spreadsheet, and we're supposed to. 00:30:22 Speaker 6 I actually didn't know there was a spreadsheet, I've only used Project Works to do it. Oh have you? Yeah, yeah. 00:30:26 Speaker 5 Do you cost out of, do you create a job in there. 00:30:29 Speaker 6 Yeah, I put the time codes in. 00:30:30 Speaker 5 Time codes. 00:30:31 Speaker 6 And then how many hours per each. 00:30:33 Speaker 5 And that's how you price it. 00:30:34 Speaker 2 That's how I price it. 00:30:35 Speaker 5 Yeah, well, I mean. 00:30:36 Speaker 2 So there's no standardisation around that then. 00:30:39 Speaker 3 No, but traditionally what we've done is, and I think most people just use a spreadsheet. We haven't had Project Works for that long. 00:30:44 Speaker 5 Oh, I have. 00:30:44 Speaker 3 And the spreadsheet's broken down into the phases. 00:30:48 Speaker 5 Yeah. Oh yeah, yeah. 00:30:50 Speaker 3 Yeah, and then you've got your phases, and then your tasks. 00:30:54 Speaker 5 It's like your work break. It's your WBS sort of breakdown structure. 00:30:58 Speaker 3 You've got your people and their rates, and that's how you build up the... 00:31:01 Speaker 2 You know the invoicing thing that we're going to build? It actually needs all of this info. So the budget that you guys are doing, right, is eventually actually what you compare when you finally... 00:31:14 Speaker 5 Invoice. 00:31:15 Speaker 2 Invoice, right? So they're almost... It needs to be able to talk to one another to that final point that we want to get to. 00:31:22 Speaker 5 Oh, we just haven't got an invoicing for a second before. Yeah, it's super interesting. 00:31:26 Speaker 6 Because where the process breaks down, Yeah, tell me. So I use ProjectWorks and I do it like this. 00:31:33 Speaker 5 So you map out all of your... 00:31:34 Speaker 6 And I allocate how many hours to each task. Yeah. To get the project budget. In ProjectWorks, so that creates like a time code for each. like step of the project that you can book your time to, but not everyone uses it. But it creates like, if you add like 10 time codes to each project on your timesheet, it's just unwieldy. So people just pick one and book all their time. 00:31:58 Speaker 3 I see, yeah. Because you end up, people go, I don't know which part I'm working on. 00:32:04 Speaker 2 So what's driving having all of that breakdown? So what's driving having it broken down to such levels? So that's just how I break it, I put the budget together. 00:32:15 Speaker 3 In an ideal world, everyone's on the same page, and everyone knew exactly what they were doing, and that they had three hours allocated to audit element three. They would just go straight in and go, I've done my three hours, or I've done one of the three hours. 00:32:28 Speaker 6 And I thought that's how the process is supposed to be. 00:32:30 Speaker 2 But if they can look at their job, on that interface that we want to build for the invoicing, if it has the job in there, and the people can go into that and look and see what's already there, what's already being done. It takes out the element of the person having to actually allocate it if we drive it differently. I'm just trying to work out how to link what you guys want to solve with what they want to solve in the same thing because I actually believe that process-wise, I know that ultimately what you do in the quoting process. 00:33:02 Speaker 2 and the proposal has eventually got to be invoiced by the last people I talk to, right? So what I'm trying to get to is how do we solve the problem just not solving your problem but their problem but all the problems link into the one solution day. Because that information there, ultimately when you come back to here and they're talking about the budget compared to the cost and all that, it's that information there that she's showing you. 00:33:30 Speaker 1 I mean, there's kind of a couple of things come to mind here. First of all, that is the very standard. That first proposal template that I showed you was very complex. a lot of them just use this it's really simple general consulting time yeah right so this is more common um one of the things that um happens a lot and it's a really good thing is that we don't necessarily track to that budget because there will be variations and additions and changes. 00:34:02 Speaker 1 so in our world it's it's a really good thing when a project changes from a thirty thousand dollar proposal to a sixty thousand dollar in project work so just in terms of tracking budgets. 00:34:14 Speaker 2 i guess what i'm trying to get the only thing i want dave to actually click is that that input right at the very beginning is actually at the end as well yeah yeah that's where i want to bring i know what you're saying in terms of budget i'm not specifically talking about tracking but the invoice does show that information, Not the invoice. 00:34:40 Speaker 3 I wasn't in that conversation. This is a bit of a rabbit hole because what I was trying to get at, right, was that just, when we're coming up with a price, right, forgetting about you're either doing an Excel. 00:34:55 Speaker 5 you're doing it in Project Works, which might get declined and you might delete that job later or whatever. 00:35:00 Speaker 6 Yeah, we're going to have to do that. It's converting that into data. 00:35:08 Speaker 5 Into the statement of works. 00:35:11 Speaker 3 So that we don't have to go, oh, I've just written all this. Now I've got to go and rewrite all this. 00:35:15 Speaker 5 But you potentially could actually have AI do that for you. 00:35:17 Speaker 2 That's what I was trying to get to, was that you could actually use the source input from the proposal to create the statement of works, which then goes into the invoice. 00:35:27 Speaker 5 Definitely. Yeah, yeah, yeah. 00:35:29 Speaker 2 That's what I was trying to highlight. 00:35:30 Speaker 3 Because if I get this, right? Yeah. And I get it as a list with a hierarchy of category and then tasks and stuff. I know what you mean, yeah. And then I can actually go straight to doing that. Because once I've written this methodology, then I'm going down to the next section, which is how much of what are we charging for this. 00:35:52 Speaker 6 So you want that methodology summarised and you can start putting hours against it. 00:35:57 Speaker 5 Yeah, and so that... 00:35:58 Speaker 3 Even if it's just the list, and then I go, okay, these are the three people that are going to do it. 00:36:01 Speaker 5 So you almost... Yeah, okay, interesting. So if there was some sort of interface, again, that was doing this and it was helping you to find information and it was helping you to... It's almost like, again, like an interface which wrapped around your project works, in a sense. Let's say you create a new job and it did create the job in what project works. And then it's also doubling as your search engine and everything else we talked about. you now have your business case methodology and you're saying you've. 00:36:34 Speaker 5 got that you could click a button and that maybe generates a WBS draft is that what you're saying right there in the interface and you could maybe delete the rows or add rows or add new stuff or whatever yeah and then maybe it's got, people's initials or names and hours and it just calculates all right there for you even if it then you go click and it just pasted into a document so it's all done for you would you do you put those in the document or is that an internal. 00:36:57 Speaker 3 okay so you put it so you put it into it like because what I'm usually better than I want to use it to calculate how what's the price that we put it yeah so. 00:37:05 Speaker 5 you would so you would sort of serve two purposes number one it would just give you a price and number two you'd go maybe go save and it would write the document the data back to the project works which saves you I mean to enter if. 00:37:15 Speaker 6 you wanted to if you would yeah if it's a large enough project will price it. 00:37:21 Speaker 3 per phase per phase but yeah I can't remember what I did I don't know whether we did one for this one, you, I think we do, sometimes we don't do it, sometimes we do it. 00:37:31 Speaker 5 Okay, that's interesting. So essentially it's like your job costing, so turning your proposal into a work breakdown structure which helps you cost it. And so then there's a bit of smarts around. Okay, to do that would be innocent of your people, of your. 00:37:47 Speaker 3 Yeah, here we go, do the second one, do the second one. 00:37:48 Speaker 5 So for AI to do that well, we would have to have a great data set around your people, your names, your capabilities, maybe, or like past jobs. 00:37:58 Speaker 6 I think we would pick the people. 00:37:59 Speaker 5 You would pick the people? We would pick the people. That makes it easier to have to train. 00:38:02 Speaker 6 Because it's resourcing and work-wise. 00:38:04 Speaker 5 But you maybe just put some roles, maybe. We have these types of roles in our business. AI maybe goes, this was the last. Maybe you can have a work breakdown structure tied as examples of previous work as well. If we're going to build that database. 00:38:17 Speaker 3 Because a lot of this stuff, like project initiation, is pretty much the same. 00:38:21 Speaker 2 Standard. 00:38:22 Speaker 3 Yeah. We always have a kick-off meeting and we always allow for review of background. 00:38:27 Speaker 5 Project management. Yeah. 00:38:28 Speaker 3 But do you see how that's just kind of a facsimile of some of that stuff? Yeah. And that allows us to then... 00:38:35 Speaker 6 Yeah, but we do it manually. Yeah. 00:38:37 Speaker 3 Well, I've had to copy and paste or rewrite these into this spreadsheet. 00:38:44 Speaker 5 Yeah, so if AI could generate something like that in a web-based interface. And maybe there's an Excel spreadsheet. Maybe there's an Excel export function, which generated it. You've kind of, again, it's like the idea of taking 90% of the work out. Maybe it reads your whole proposal and it goes, boom. And you're like, sweet, that's pretty good. I'll make a couple of tweaks, export, and you're already there. And then you're like, great. So it's all just time-saving. So then the question becomes, how do we make sure that that's as quality as possible? 00:39:15 Speaker 5 So I think it would be relatively straightforward to create a list. The hard part, well, the hard part is they make a great list. And that's just where the better the data and the better the prompting, the better the examples, all that kind of stuff. It's great. Would this document end up living in your SharePoint and is it used at all in the project, like actual delivery. 00:39:34 Speaker 3 No. 00:39:34 Speaker 5 It's just literally for you. 00:39:36 Speaker 3 Well it's for us to figure out like... 00:39:39 Speaker 5 The PM wouldn't refer to it. 00:39:41 Speaker 3 You refer to it! No, that we only use it to figure out what we're going to put in the SharePoint. 00:39:46 Speaker 5 But the project manager on the job wouldn't necessarily open it up again, it would just click dust.

No. 00:39:51 Speaker 2 So it's literally just used to quote to get the job and then... 00:39:57 Speaker 3 Well that spreadsheet is, but I think Karen you were saying... 00:39:59 Speaker 6 When I do it in Project Works, I cost my time against those time codes and then I can compare what hours I allocated versus how long it took. And in theory, get better at costing by seeing the time. 00:40:15 Speaker 2 Yeah, and I'm guessing the people in Excel are not looking at that at all, they'd be just... 00:40:20 Speaker 5 There's a little bit of, so how would you manage, let's say you solve this project, how would you then project manage it, would you then, do you manually put that all into Project Works, or does someone else do that, or is there eventually like a project list in Project Works which you manage again. 00:40:33 Speaker 3 Well, Project Works is completely flexible, so you can come up with a, like I could have built that whole structure there, but I don't, because when we've done that in the past, and we've got multiple people working on it, what I've ended up with is someone's gone into that, if you open that spreadsheet up again... 00:40:53 Speaker 5 It's probably the exact same as our issue internally. Yeah, and other people could like it. You have 25 tickets or whatever, and everyone just puts their time on three, and they just have no budget. Yeah, and then you're like, oh, are we creating a problem? This looks great, you put two hours and two hours, but you're supposed to be doing five of these things at the same time, and it's like just a day, and you're like, do I put two, or do I put ten hours. 00:41:16 Speaker 2 So is that more like a tool to work out how to price the job, as a pricing tool, rather than anything else? Karen's just going to another level with this. 00:41:27 Speaker 6 You could probably put like phase one, phase two, phase three in protein. 00:41:30 Speaker 5 Yeah, that's, you're literally just doing the same, same as us and now Turnly, right? We're suddenly building a firewall. It's actually like 25 steps. The dude's doing it at like two full days. He's not, we might budget at two hours, two hours, two hours, two hours, two hours. He's not gonna wanna go in and out of 10 tickets to write timesheets. 00:41:50 Speaker 3 No, yeah. 00:41:51 Speaker 5 I know, it's the same, same idea, I think. 00:41:54 Speaker 3 Yeah, so what we will end up doing is we, I mean, that's a sort of just a general one, but you could actually say, I'm gonna take that and repeat it three times for phase one, phase two. 00:42:06 Speaker 5 phase three. 00:42:06 Speaker 3 That would be how I would generally approach it. 00:42:09 Speaker 6 Yeah, yeah, that's a better one. 00:42:10 Speaker 1 Yeah, okay, so this is one of Alice's templates. So she's got. 00:42:14 Speaker 5 Kick off, projects, review. So yeah, these might represent pieces of work. 00:42:18 Speaker 1 where you're, there are a lot of stuff. And then people actually have to code their time on that. 00:42:23 Speaker 5 And they're scheduled. Yeah, and their time. 00:42:25 Speaker 1 And quite frankly, if they don't, the project may- manager will kick their butt, and next time, they'll put it in the right place. 00:42:31 Speaker 5 So there is two different things, one's a project works set up, one's a costing tool. You don't really need the Excel spreadsheets just there as it leads to an end, so could the AI platform generate a cost, quick and easy. 00:42:43 Speaker 1 We use these templates in project works to do the costing. So on this particular one, exactly what Matt's doing in the Excel role, I'm going to say, I'm going to add... Myself, and then I'm going to estimate three hours, and it'll cost it up for me. So to Karen's point, if I've estimated, so this is a template, so I don't actually want to save over it, but if I, when I start working on the job, I can see that I estimated four hours, and I can see that I've done eight hours worth of work, so actually it's better. 00:43:15 Speaker 1 Whereas if it's just a one-off in Excel that no one's ever looking at again, and I don't have that tracking, so I think it's way better in project mode. 00:43:23 Speaker 3 So do I, but I'm just saying that the reality of it is, is that it only really works perfectly across the whole business if everyone can understand exactly which, whether they're working on 5A or 5B, and how many hours they've got allocated to it, and that's just not the case. 00:43:42 Speaker 2 So see those steps, one, two, three, and all that, are they standard across every project? No. 00:43:47 Speaker 5 No, no, no. 00:43:47 Speaker 2 And they're specific based on the methodology, correct. 00:43:51 Speaker 5 Yes. Yep. 00:43:52 Speaker 6 This is one that we're working on at the moment. So this is one of mine where I've done it, I've allocated the hours, time entered, time allocated. 00:44:01 Speaker 3 Yeah but even this one is like, we blew it out, we blew out that one. And Gareth and I, this is one I was about to bring up because Gareth and I were like, oh my god, because you were away on holiday, having fun, and in the meantime we were blowing out your budget. 00:44:23 Speaker 5 And then the 0.5 hours, I was going to 16, and I'm like, wow. 00:44:26 Speaker 6 No, that's the other way around, I allocated 16, but... 00:44:28 Speaker 5 Oh, sorry, yeah, yeah, sorry, yeah, of course. No one's used that one, but that's like, they've charged the elsewhere and stuff. I see, yeah, I see. 00:44:34 Speaker 2 Yeah, it's where they've put it, so they'll just... 00:44:36 Speaker 5 3A has gone up, yeah. 00:44:37 Speaker 2 But do you guys actually want to get to that real detailed level. 00:44:41 Speaker 5 Not everybody at the Pins on Approach is going to do that. 00:44:42 Speaker 2 No, because I don't think we want to mandate it. Can I tell you... Okay, that's where I was trying to work out. 00:44:48 Speaker 1 I'm just going to look back to invoicing, though. When this gets invoiced, it's got one budget. Yes. The budget is professional services time. Yes, yeah, yeah. And that's the total. 00:44:58 Speaker 2 It's a sub-item, so it will consolidate. 00:45:00 Speaker 5 As long as the total is hit a level. 00:45:02 Speaker 2 But that total, you do actually put on the invoice, though. 00:45:05 Speaker 5 Yeah. 00:45:05 Speaker 2 As where I was going, yeah. 00:45:07 Speaker 1 Yeah, but all of these things are consolidated because that is a budget. We do have some jobs that have multiple budgets. Yeah. So phase one, phase two, phase three will be separate budgets. So these are activities under a budget. 00:45:19 Speaker 5 Under a budget, yeah. 00:45:20 Speaker 1 Yeah. So this detail goes nowhere near the... 00:45:22 Speaker 2 Yeah, yeah, yeah. 00:45:23 Speaker 5 The same as our system. 00:45:24 Speaker 2 But I guess where I was going was that if you've got the information in the system, then we need the last thing to pull the information rather than get it from anywhere else was where I was going. I wanted to make sure that we were streamlining. 00:45:37 Speaker 3 One of the problems that I've found with Project Works is it looks great here and it looks, you know, like as a PM this is a really helpful view. But when you're entering time, I've got to go in and I've got to go Project, you know, A, B, C, 1, 2, 3 and then I've got to pick one of these and then I've got to pin it to my timesheet and then if it changes... That's why people put their time in the wrong place, because the first one they use will be like, oh yeah, I'm just going to put my time against that job number. 00:46:08 Speaker 3 But that's just laziness. I'm going to be honest. Well, no, it's not just laziness, and it's not just laziness, because people don't, people don't know, like if you're working on 1B, you don't even know that there's a 5A necessarily. You don't, you don't, you know, like you don't. 00:46:23 Speaker 1 But if you're not working on it, you need to know, yeah. 00:46:25 Speaker 3 Because you, because you, we're getting people, like I might get Matt Johnson to do a part of 3A, you know.

00:46:30 Speaker 6 Yeah. 00:46:30 Speaker 3 And then he, and then later on I'm asking him to do something else, and it might be part of 5C. And if I don't tell him, put it against 5C. 00:46:37 Speaker 6 Yeah, he'll put it anywhere. 00:46:38 Speaker 3 He'll just put it, he'll put it against 3A, because he'll be like, oh, it's just that job. 00:46:41 Speaker 6 If I'm, if I'm brutally honest. 00:46:42 Speaker 3 Got it. 00:46:43 Speaker 6 I think the worst people are the directors. Yeah. Because in their timesheet, they've got like 20 projects, and if they've got 10 time codes for each project, we don't want them spending two hours during their timesheet. 00:46:57 Speaker 2 And you also, yeah, I was just going to say that, you actually don't want them, and you don't actually, where I was trying to get to is you actually don't even want it on that specific detail level, do you really. 00:47:07 Speaker 7 No. 00:47:08 Speaker 2 Well, I do. Some do and some don't. So maybe you want to be able to, yeah, they need to have the choice whether they can drill down or not. I just know that as a project manager. As an accountant, I would want to know if I was making money or not, right? So our young, my assistant who we automated is now our ops coordinator. Oh my goodness, has that been a great move because does she care about that budget? She does. 00:47:36 Speaker 1 Karen is an exception in those very detailed ones. This is a lot more common. It's just general consulting time, boom, that's it. And that's what it goes to. 00:47:51 Speaker 5 And there's always ways, again, when you've got an API into a system there's potential for a future to enter time in a third party system, like a custom, which makes it easier. That would be another job, potentially an enhancement on the invoicing system, it could be a time entry system, and a way better, again, the same way that we're abstracting. drilling into a job to find the right thing. Maybe there's a way of it being displayed differently and make it easier, whatever. 00:48:22 Speaker 5 But that's another, probably another project, yeah. 00:48:26 Speaker 1 I'm not sure this is a curveball or not, but we use Zoho as our CRM system. Zoho CRM. So tracking opportunities. Yes. When we get to proposal development, we move it into the proposal stage, it asks us if we want to create in Project Works. 00:48:43 Speaker 5 And is this an automation you guys have built yourself. 00:48:45 Speaker 1 Yeah. 00:48:46 Speaker 5 Oh, cool. Or it's like there's a built-in integration between them, or is it custom. 00:48:50 Speaker 1 No, it's custom. Yeah. Nice. And they don't talk to each other. So in Zoho, if we've got an opportunity, and it's going into proposal development, we can ask it to generate a proposal template so we can go do our costing. It only uses, not everybody, we've got a choice in there, yes, no, because Karen wouldn't want to use this because she likes her detailed proposal, she might just duplicate one she's already done. It uses the most basic, it uses this. 00:49:22 Speaker 5 Does it tag it against the customer? Is the customer records the same. 00:49:28 Speaker 1 They do, they are supposed to update each other, but it's not. Okay, yeah, okay. No, it's supposed to be two-way, but it's... 00:49:39 Speaker 5 The only reason I know is because I know CRM, and we used to have it ourselves. We didn't end up finding a need for it after a while, but having it for a few years was great. As at Deluge, they've got their own language for writing scripts. 00:49:57 Speaker 1 I'm just going to cancel that because I don't want to actually move this. This is somebody's job. 00:50:03 Speaker 3 Yeah, fair enough. 00:50:05 Speaker 1 So it does, but as I say, it just goes to this. So if we're going to look at anything that automates it, we want to just keep in the back of our minds that there is already a way to. 00:50:18 Speaker 3 And that's why I think just generating the structure. It's not even doing the costing for us. It's the structure of how the project's broken down.

And you can choose whether or not you build it into here or not. 00:50:30 Speaker 5 Right, yeah, I think that's a good point, yeah. Where the data lives is different than the data being generated, as we're saying. Yeah. 00:50:39 Speaker 6 I would love to get to the point where it could say. 00:50:42 Speaker 3 Yeah, but that could be a choice step, though. 00:50:44 Speaker 6 Yeah, but because we don't have the timesheet data in that detail, I don't think we've got the database to be able to cost it. 00:50:53 Speaker 3 Oh I see what you mean, what I'm getting at is that you write a methodology and then, rather than you having to then duplicate it to turn it into a breakdown it just does that and then you can from there that's your platform or your springboard to decide whether or not you got what automation you might build on to the back of that but you don't have to do that straight away. 00:51:16 Speaker 6 No, no. But yeah, that's where my ideal would be. 00:51:21 Speaker 3 Yeah, how much is this going to cost. 00:51:23 Speaker 6 Yeah, yeah. How many hours did we take on this last time? Forget about what we told them we were going to do. How many hours did it actually take? Yeah, yeah, yeah. But we don't have the database. 00:51:33 Speaker 5 On a similar job. So then that comes down to where that data is so useful. 00:51:38 Speaker 7 Yeah. 00:51:39 Speaker 5 Having like your proposals and your actuals all kind of in some database, which is searchable, findable, whatever. 00:51:47 Speaker 6 And that's fine. 00:51:48 Speaker 5 And then serve that up to you as someone who's trying to build the next one. 00:51:51 Speaker 6 Yeah, yeah. 00:51:51 Speaker 5 Having all that data. What if that looks like right now? But we can explore different interfaces and different ways of exploring that. But I'm just imagining. 00:51:59 Speaker 1 We can do that in a spreadsheet. 00:52:01 Speaker 5 Like what if you used your matrix and you had, yeah, customer name. And then you clicked on the matrix what service line it was, boom, and that immediately serves up everything relevant to you, based on the sections, your track record, it's already pre-written, or pre, I'm just trying to imagine what that could look like. 00:52:20 Speaker 2 Especially with the service lines and the ones that you said are very common, that would do most of the work. It's only on the stuff that's exceptional that we would need more and more human intervention. Because you're saying there's lots of commonality, right, in what the methodology, if you've got similar jobs. 00:52:39 Speaker 6 Some commonality, yeah, I'm nervous about that, not too much. but i think even from the track record that's where i think yeah that's what i was going to. 00:52:48 Speaker 2 say if you've got seven jobs where you've done the same thing maybe the ai can pick out the. 00:52:53 Speaker 5 two things that are similar i reckon i reckon like as a next steps it'd be great because i'm also mindful of like the time in terms of like it's 11. um i reckon next steps would be so interesting to sit down with you for a whole another hour just like one-on-one and go through. 00:53:08 Speaker 6 a proposal and go through those sections just based on what i need though because it's going. 00:53:13 Speaker 5 to be yeah but i i think maybe i also i think there's probably a case to have maybe two or three, interviews or it could be a half an hour an hour um where we dig into these points the most important points that work break down like the methodology the track record and i don't know if um if you're able to even share some example proposals to us because it could be scratched out or whatever i don't mind, Just so we can read them, because I'd be interested in the human eyeball 10 examples, because then. 00:53:43 Speaker 5 I could start to look at them and go, what can we see as an external party, as similarities, and differences, and start getting a sense of the data. And also start getting a sense of, I'll be interested in even quantities of proposals and things like that. Because if we're going to build a proof of concept around this, or even just propose a proof of concept around this, I'd love to be really clear on what this could look like and feel like, and we might be able to pull together a really, really basic proof of concept as part of our scope here around this. 00:54:12 Speaker 2 So I'm correct, right, that your two big real pain points and things you want to solve with this is the methodology and the track record. 00:54:20 Speaker 5 And then pricing breakdown. 00:54:22 Speaker 2 Yeah, the pricing breakdown's, I'm guessing, secondary, right. 00:54:26 Speaker 5 Yeah, secondary. 00:54:26 Speaker 2 So it's really about focusing on those two things. If you solve the methodology, you can get the pricings from it, right? If we can solve those two things and make it easier, that would be a win for that. That's what you're looking for. 00:54:39 Speaker 6 Yes, I would add to that, though. So our understanding of your requirements or our understanding of your needs. Yeah. But that's going to take more user input. Yes, and that's, yeah. But we, so we have a table of our brand messages. 00:54:54 Speaker 5 Yeah, okay. 00:54:55 Speaker 6 Okay. Which I've found really helpful. So, if we've had the conversation with the client, we can take, you know, half a dozen dot points around, you know, what's important to them. 00:55:05 Speaker 5 Yeah, and your transcripts from meetings, and a few things. 00:55:08 Speaker 6 And you can combine it with our brand messages. 00:55:10 Speaker 5 That could spread out. 00:55:11 Speaker 6 Yeah, and I'll co-pilot to pick two or three. If you tell it to use all of it, but it sounds really cheesy. 00:55:17 Speaker 5 because it's just a usable thing. Yeah, yeah, yeah. 00:55:19 Speaker 6 Pick three of the brand messages that are most relevant to this project, and weave them into our understanding of your requirements. 00:55:25 Speaker 5 That's amazing. So, I think, yeah, if you look at those three things, then. So, understanding your requirements, the methodology, and then the third thing. 00:55:31 Speaker 2 The brand message. 00:55:33 Speaker 5 To make a, like, then we kind of, we might say, to make a great understanding section. the inputs you would need are A, B, C, D, E. And then what's the human and the AI part? And then how do we get, you know, you might need to have a slight tweak in your process. Okay, we're gonna record our meetings, and then we could have an interface where you literally say, upload your transcripts, click and drag the three, and then select your blah, click a button, and then that generates something for you. Or something, you know, there's a workflow. 00:56:05 Speaker 5 which we could build. 00:56:06 Speaker 6 There's an input in that, our understanding of your requirements, which is not from the client, and not from our brand messages, but from our understanding of the industry. 00:56:17 Speaker 5 Yeah, there's also that, which is really interesting. Yeah. 00:56:19 Speaker 6 We understand that this, you know, change in legislation's gonna impact what you're doing in this area. 00:56:25 Speaker 5 That would be your brain dump bullet point. You know, you're gonna mix a bunch of bullet points. But the other thing that we know. 00:56:30 Speaker 6 that we need to take into account. 00:56:32 Speaker 5 Yeah, yeah. 00:56:33 Speaker 3 But I would say a big percentage of our jobs, would be a decent chunk would be playing back the email yeah all right so there's. 00:56:47 Speaker 5 also the input from the client which is typically an email and then you go and then you just. 00:56:51 Speaker 3 you basically are playing it back playing it back almost verbatim you know so that's that and you're adding on to it yeah yeah exactly yeah awesome that's your that's sort of your basic that's great you needed that you need these three things and this is you. 00:57:05 Speaker 5 know this is how we understood those based on abc and ai helps to helps to bring a together yeah so it is that yeah so it's almost like the proposal is broken down into into three major pieces some of it's templated but there's like one two three pieces which are need take ages to write and the reason is because it basically takes ages to write secondly because for some of it you've got to go hunting for data and ask your colleagues and we and i can help minimize all that and in the third part i can help break down work, into work breakdown structures and estimates and all sorts. 00:57:37 Speaker 5 So there's a lot of heavy lifting that AI can do. None of it's taking away from your actual thoughts or your consulting. It's just the stuff you'd be doing anyway. It's just time consuming crap. Yeah, yeah. Yeah, exactly. And it feels like, and then you remain in the driver's seat. You're still completely in control. 00:57:53 Speaker 3 We don't, we don't. 00:57:54 Speaker 5 All the wins with no. 00:57:54 Speaker 3 I just don't see a world. No. 00:57:56 Speaker 5 Yeah, no, I 100% agree. 00:57:57 Speaker 3 Where you just go, write me a proposal for this and it comes out. 00:58:01 Speaker 5 Magic, yeah. 00:58:01 Speaker 3 And it's gonna be, and it's gonna be what they need. Yeah. Because the other thing we've gotta be aware of as well with proposals is it's our connection with our client. And so if they pick it up and go, you just got AI to write this. Yeah. It's like my son doing an essay on AI, you know, without actually, you know, just handing it in. It's kinda obvious. 00:58:23 Speaker 5 Yeah, yeah. You have to ask AI to make at least one spelling mistake. 00:58:26 Speaker 3 Yeah, yeah. 00:58:27 Speaker 5 It's a dead giveaway. 00:58:30 Speaker 3 Well, I've actually had two instances where we've done stuff, and because we've done proposals that the client said, it's almost like you won't use AI to write it. And I was like, funny you said that, because we actually didn't. And it was because we were almost, we didn't put enough of our own, like, yeah. 00:58:49 Speaker 5 AI must have learned from you guys. That's a compliment. You know, AI's writing must have learned from your proposal. Like, no, that's a compliment, guys. We're so good at writing that. 00:58:59 Speaker 3 Take it as such, I suppose. But it was more that it was, the feedback on one of them was like, it didn't really show that you kind of. what you as a company, you know, like, your special source. Really, right. Because it was almost too, like... Generic. 00:59:19 Speaker 2 It's funny you say that. We tried to, for our AI division, we tried to create a strategic plan, and the first one we came up with, Dave did the AI, and it was so generic. It was just useless, wasn't it? We didn't use it at all. But it just had no humanness to it, or no thought. 00:59:38 Speaker 5 Yeah, yeah, 100%. 00:59:40 Speaker 2 I mean, it was a good try. 00:59:42 Speaker 5 It was great at it, and a lot of things the AI's not great at. 00:59:44 Speaker 2 Yeah, and that is creativity. 00:59:47 Speaker 5 But yeah, I think that's a great session. I think we could probably call it there. 00:59:51 Speaker 1 I was trying to count the number of proposals, but it's a little bit tricky. I can tell you there were 133 new jobs in 12 months. 133 new jobs, okay. But I can't see how many proposals we didn't get. And I was looking in the proposals folder, but it's folders... By client, I was hoping just to do a quick count. 01:00:09 Speaker 2 Would you hit rate 50-50? No, it would be higher. It would be like 75%. Really? Nice. 01:00:16 Speaker 6 We don't tender a lot. 01:00:17 Speaker 2 No, because you're pretty much asked to propose. Yeah. Prepare us a proposal for this. Yeah, Aussie tenders a lot if we do, yeah. If you assumed probably 75%? Yeah. 01:00:27 Speaker 3 I'd say... 01:00:28 Speaker 2 So that means you're doing 200 a year, basically. 01:00:32 Speaker 3 Yeah, but they take a fair whack of time, don't they? Yeah, they do. I would say, you know, so that's each one of us, you know. 01:00:39 Speaker 2 You could say, so these three things...

01:00:41 Speaker 5 Is it 200 proposals across the group? Yeah. So 200 proposals, how many consultants? That's a guess, 27. 27. 01:00:47 Speaker 3 Yeah, but there's also a whole lot of email proposals as well. Yeah, exactly. 01:00:52 Speaker 5 Because that's probably more than... Oh, yeah. Because that only... It's a new job. Right. We've basically got new jobs. Yeah. Because that only... Well, it's only about seven a month, seven a year, eight per year per person, but that doesn't sound like... Is that more than that. 01:01:03 Speaker 6 Yeah, yeah, yeah. Yeah. But if you're going off new jobs though, not all of those would have a proposal like this associated with them. So maybe it's tricky. 01:01:14 Speaker 3 But these are the big ones, these are the problems. 01:01:15 Speaker 6 Yeah, I was going to say, it's a bigger job that you would propose. Yeah, I wonder if that's it. I wonder if you could look at the budgets and see how many of those new jobs were over 25k or something. 01:01:26 Speaker 3 Because I'm not writing a five-page proposal for a job that... Like when Auckland Council, for example, will bring us and say, can you do a peer review of this piece of work? A few grand, and it's like, yeah, and I'm not going to write them a six-page document like that. 01:01:43 Speaker 6 Cover all of that stuff. Make sure they've got something for their file that says, this is what we're going to do, and who's going to do it, and how much it's going to cost. 01:01:51 Speaker 5 That's really cool. That's awesome. I think in terms of just next steps, I think that we should do a couple more, two or three more meetings. It probably is great to have another one-on-one with both of you. Is there another person we should be engaging on your team, just in terms of a different perspective. 01:02:06 Speaker 3 Yeah, because the Aussies, because they're doing tendering a lot more. They do a lot of tendering. Government state requirements. Well, it's because the Aussies are dodgy, right? We're actually only half-joking there. Yeah, I'm married to one. I'm married to one. I know, I know. They've had to, like, over the years, they've had to actually be really half-joking. 01:02:32 Speaker 2 There's all sorts of policies. Yeah, you know, corruption within the state government. That's what you're talking about, right. 01:02:38 Speaker 3 Well, yeah, like, in local government, it's like, kind of, you know, giving your mates, like, you know... ten million dollar contracts you know here's a pie full of money underneath. right yeah all that's gone on in the past and that's why they're there right so they're a lot more strained around like having to go out to market yeah being and doing the same procurement. 01:03:00 Speaker 5 prices and all that sort of stuff yeah interesting so maybe why not maybe ann could help us facilitate some some names or introductions we can do some teams meetings um we have at least a couple more meetings you know it could be 30 to 45 minutes each doesn't have to be too long yeah just going. 01:03:17 Speaker 2 through the project over in aussie or do you just do something you're just in new south wales yeah okay we've done over the years we've done other states but you have decided just new south wales, Our office isn't sitting there. Yeah, it just makes it easier. 01:03:30 Speaker 5 Yeah, it's big. 01:03:32 Speaker 2 Yeah, there's plenty of work in New South Wales alone. 01:03:34 Speaker 5 It's like the whole country of New Zealand just by itself, right, again, over there. 01:03:38 Speaker 1 Yeah. Out of interest of the 130, 91 were over 25k. OK. Yeah, just as an interest. Does anyone need a coffee or tea to pass? Definitely, probably. I'm all good, but I'm going to fill up my water bottle. 01:03:54 Speaker 5 Is there any other meetings we should have? Maybe another couple of consultants we should catch up with on this one? Any other names that come to mind. 01:04:03 Speaker 1 No, I just think we need one Aussie. 01:04:04 Speaker 5 One Aussie.

And any other people in the business regarding this? No, just you guys. 01:04:10 Speaker 1 Proposals? Yeah. No, I don't think we don't want too many cooks. No, all good? Yeah. 01:04:17 Speaker 3 Yeah, and Dan would get a bit stroppy if we pulled people out to put too much. I think it's generic enough. Between Karen and myself and someone from Aussie, you're not going to hear anything new, I don't think, from anyone else. We all have to do it, so we all know what's. And it's all pretty standard, isn't it. 01:04:44 Speaker 6 I think we probably will have it developed. 01:05:20 Speaker 3 And then you go and actually have to... you actually have to turn it into something usable and it's still another you know few hours work tracking it down rewriting it so that it's fit for purpose you know like the blurb you know because, i i for years i've been like why can't we just write it write track records it's closing out the, it's part of closing out the project right like that so that we can access it i think we're. 01:05:48 Speaker 6 supposed to but we don't but no one does but that's where i think that yeah i can help with advantage of actually so instead of being a generic blurb about the project you can actually copilot or customize it to what the need is yeah that's what's important and because it can do it. 01:06:05 Speaker 5 because of the context that it can access right yeah so then if we could if we can essentially, package that context into a system like copilot but tailor it even better or tell me if i'm. 01:06:17 Speaker 6 fitting a square peg in a round hole yeah don't make stuff up just to make it fit that's right. 01:06:22 Speaker 5 So I think there's just any questions for you, Sandeep, on that. 01:06:25 Speaker 4 I have a question about the methodology. 01:06:28 Speaker 5 Oh, the methodology. 01:06:29 Speaker 4 I think we can discuss it later, right. 01:06:32 Speaker 5 Yeah, yeah, sure, sure. Just in terms of how it's derived. 01:06:37 Speaker 4 Methodology building, what are the... I saw you have a few assessments, so how you decide which assessment should propose. 01:06:50 Speaker 5 I might run to the bathroom. 01:06:52 Speaker 1 Yeah, yeah, yeah. And then... Dan, did you want another coffee. 01:06:54 Speaker 5 I might... 01:06:54 Speaker 1 Oh, is that a bad idea with your brain. 01:06:56 Speaker 5 I think brain, yeah. I think water's good for me. 01:07:00 Speaker 1 Oh, OK. 01:07:01 Speaker 5 I think water's good for me. 01:07:02 Speaker 1 That's good. All right.

- Session 3

00:00:00 Speaker 1 the the idea was i think we talked about this idea as being like knowledge platform opportunity discovery and and this one maybe is slight i don't know we need to pin down what this what what the kind of goal here is and explore what this could look like um uh yeah so what what's your we don't start with this one and i know that we actually do have a hard stop at 12. normally i we would probably have a more margin we actually had as we said a new staff member uh starting and. 00:00:30 Speaker 1 we've arranged a lunch a whole company lunch across the office so we're doing that at 12 30. 00:00:35 Speaker 2 yeah that's cool i don't think we'll i think we'll half an hour will be enough okay yeah. 00:00:39 Speaker 3 this one was basically basically sparked from, you talking at strategy day about wouldn't it be so great if you got all of these amazing leads from from that stuff right yeah that's all of me all. 00:00:55 Speaker 4 right all right yeah as in leads from places other than the government no no I. 00:01:00 Speaker 2 think so you and regional director was really like excited about this oh cool because so so what we do how we win work is because we were relationship based is that we go to our clients periodically and we talk about like what's what things are happening in their business and so we're not just. 00:01:32 Speaker 2 sitting there waiting, we go to them and say oh so you know you'll be your contracts that you know you'd like for example your waste contracts are expiring and you know a couple of years and you know how's it going have you thought about how you're gonna what you're gonna do next and so we there's this lead in time yeah we have right so we're trying to we're trying to sort of prime them to come to us and start the conversation about you know that projects which a year or two. 00:02:01 Speaker 1 years long duration that's and it's written this thing so yeah your Wi-Fi actually now I should be sorry it's the longest password you can act on yep yes, yeah you know I see I see I read it from your website it's a really cool one night I sure when I first thought that was a really cool one-liner, so because you're so you obviously do get some many emails and requests but but part of your your pipeline is actually drummed up by a. 00:02:33 Speaker 2 proactive work yeah so yeah so so what we have these sales plans and in the sales plans we'll have like different councils or or in the case of central government different agencies and we will identify like you know what what contracts might be expiring when or any project or any sort of investment or initiatives that they have that we know about and we put. 00:03:04 Speaker 2 them on the list against the you know a name to follow up with next time we you know we touch base with them right now. It's often hard to know what those things might be or to, you know, like we don't, over the years we've tried to sort of create and maintain databases on contracts and stuff and we do have sort of bits here and there about, you know, here are all the waste contracts that we know about from the collection contracts and predates or here are the parks and facilities contracts, but it's really hard to keep those things up to date. 00:03:42 Speaker 2 Now, there's a source of information that exists for every council, which is their long-term strategic plan, and those things are like, I mean, they're like huge. If you printed them out, they're perfect for keeping doors open. 00:04:00 Speaker 4 Yeah, they do. I always read Auckland councils, just for the record. Yeah, yeah. Well, I own a couple of houses out here and I want to know what's going on. 00:04:10 Speaker 2 And they are really good. And Auckland's actually pretty good at being quite straight to the point about what they're investing, what your rates go to and stuff. 00:04:19 Speaker 4 And I normally give them feedback too. 00:04:22 Speaker 2 Really. 00:04:22 Speaker 4 Yeah, I actually do. The stuff is available and it's important. If you own a house in Auckland, like I'm out in Harlandsville, I got a letter the other day and they're going to rezone my entire neighbourhood. Are they? Yeah, two houses. They're going to rezone it. 00:04:37 Speaker 2 Wow. Exactly. So, you know, these are the things. That's actually similar to what we want to know is like, what have you got in your budget. 00:04:47 Speaker 4 Yes, to do. 00:04:48 Speaker 2 To do. Like, for example, if I use a housing one, it's like, you know, some councils are looking to develop their... ... their elderly person's housing portfolios other councils are looking to sell them, and they're quite big quite big community decisions so they they put them in their ltps, um and say this is what we've got planned for the next three years you know um and what we want to be able to do is rather than having to like none of us read those bloody things unless. 00:05:28 Speaker 1 yeah you might might reactively do it because of a job you'll go find the information you need. 00:05:33 Speaker 2 yeah exactly yeah yeah but what we what we the opportunity we see with ai is actually to scan through them and tell you this is what are all yeah what are what are this what are the projects that are identified or what are they what are their investments or you know can you um, You know, can you find any, you know, maintenance or long-term service contracts that are expiring and that will be up for renewal. 00:05:59 Speaker 4 So what you would be is like, so example, what I'm hearing you want to do is scan like every council in the country's long-term strategic plans or their district and then get a summary of it and on the board it says, and gore, we're going to do this this day, da, that's what you're looking for, right. 00:06:16 Speaker 2 Yeah, but only filtering out all of the guff about, you know, we're going to, you know, work with our communities. 00:06:23 Speaker 4 Yeah, you just want to know what they're going to spend money on. 00:06:26 Speaker 2 They want to know only that, we just want to know what are the, where are your service, you know, what are you doing in terms of a service renewal or a service change or some new investment, you know, those sorts of things. 00:06:39 Speaker 1 Yeah, so it's basically, yeah, that's awesome. So clearly this is a very interesting, interesting. Yeah. Project I'm imagining so imagine if you've got like this world of world of of data What do you think would be most useful? So if we look at this idea of unstructured data and structured data, yeah structured data is like your project works. It's, specific clients, specific, Stages, it's specific inputs that are structured. Yeah, so. 00:07:13 Speaker 1 Would we want to have some kind of CRM-like interface or something, again, which could be searchable, findable, where we turn... Because it's one thing to just have a summarised version of all these documents, which is just more summaries to read. Probably more useful to have... If you could try and articulate... 00:07:32 Speaker 4 A planning tool. 00:07:33 Speaker 1 Yeah, yes, some kind of... Something that comes into being. Imagine if AI could plan by region, by this, by that. Yeah. Where you could sort, filter, search, and maybe even suggest, it could summarise, it could say, maybe, like, if you think about this, where it could go long-term, maybe it's got all that data, yes. It's like your assistant who's writing all the stuff. And then beyond that, it's agentic, as in it's also then looking at the previous work you've done for everything. And it's suggesting future work, and it's whatever. 00:08:04 Speaker 1 You can sort of imagine these things, that list of use cases will probably grow quite long, and the ability to develop all that. 00:08:11 Speaker 2 is just a matter of time well there's a subset of all of this yeah it's like clients that we've like you know done their procurement for them for example we want we want we could actually be like going through our own records and going when when does that contract yeah that's right it's again the same thing yeah so there's a few key data points it's like what what is the contract what is the service you know like what type of service is it what's the client what's the name of the client and when when does when does that um you know contract expire it's a contract or when. 00:08:44 Speaker 2 you know when when's the investment um if it's a you know something new yeah when's it got to be proposed yeah yeah so so for example um i'll give you an example another example like i read the napier city council ltp last year and it said in 2025 we're looking to review, our um, our suite of community halls. 00:09:10 Speaker 4 Yeah, there. 00:09:11 Speaker 2 Right. And so I touched base with them, and they said, oh, yeah, that's still on our program. Like, get in touch with us, you know, in about three months' time. 00:09:21 Speaker 1 Brilliant. So you're just reaching out. It's like, yeah. Yeah. 00:09:23 Speaker 2 Because we've read it, and we've gone, hey, we can help you with that. 00:09:26 Speaker 1 Fantastic. Yeah. And so if you hadn't done that, where would they go? Would they just go to the market, Google. 00:09:32 Speaker 2 Yeah, they'd either do it themselves, or they'd ring up someone else. 00:09:35 Speaker 1 Is that right. 00:09:36 Speaker 2 Yeah. Yeah, or they might just coincidentally ask. 00:09:42 Speaker 1 So, yeah. So if we were to, like, summon this writer, it would be something like, yeah, I mean, like I said, right, I literally, as I was saying, I was clearly speaking a vision, which is a very possible practical vision, of AI is really good at condensing massive information, right? This is one of its superpowers. So how do we harness that in a way, like a laser that gets an outcome for you guys, which is how does AI... wash through all that data and drop out the bottom potential leads. That'd be great, right? And then the enhancement on that could be how do we have a probability? 00:10:15 Speaker 1 How do we have a scheduling tool? How do we have expiry dates? How do we, you know, there's a whole lot of stuff that could make that really great. So imagine a database which gets filled of leads and it's just like, contract dates, renewals, maybe it's a self-documenting system relatively speaking, because it can handle the 200-page document from every council and we start to go so the perfect concept for this could be let's just handle one city, you know what I mean? Yeah, yeah. 00:10:38 Speaker 2 And then you just want, we only need one or two reference points to start off with. Yeah, and then we can work our way back and go actually, you know, like based on the fact that that's going to be released in 2027, we need to get in touch with them now. 00:10:52 Speaker 1 Yeah, that's right. 00:10:53 Speaker 2 So we don't need all the gaps filled in, like, but, It's that trigger thing. 00:11:00 Speaker 4 Yeah, it's that planning trigger. We need to think about this. We need to think about this today. 00:11:04 Speaker 1 Yeah, that's right. So a planning trigger based on that and then and then I think like that could be what I'm trying to think of it I'm trying to define like what a phase one could look like and then phase future phases could look like yeah every single item that it's found could then potentially do more lookups or more agentic type styles where it's been looking at your old jobs and getting more information and it was also done by Matt so I'm gonna put it on Matt's calendar to drop you an email yeah based on this thing I just found this. 00:11:37 Speaker 1 thing you did like whatever so I suggesting you leads and please call Jim. 00:11:41 Speaker 2 because you know what happens with councils and is that they often like, well there's a number that quite a I'd say a big percentage of the times when we reach out they haven't started but the fact that we're reaching out to them and saying oh, when are you going to start doing this? You know, we're happy to help you if you like. That actually initiates them to think, to go, oh. Yeah. Yeah, right. 00:12:06 Speaker 4 No, I was going to imagine. 00:12:07 Speaker 2 Because if you've got a contract that's 10 years, like a lot of waste contracts, for example, are 10 years, they run for 10 years. So the people who are running them now aren't the same people that wrote the document. And they're also not going to go and say, hang on. And they don't necessarily know what to do in terms of triggering a procurement exercise. So can you come to them and say, oh, your contract's expiring in two years' time. They're like, oh, yeah. And they're like, well, what are you going to do next? And then they start, the cogs start going, oh, shit. Actually, yeah, I've got to. 00:12:38 Speaker 5 Yeah. 00:12:39 Speaker 2 We've got to start now because it takes six months to order trucks even, for example, to run the collection service. So do you see what I mean? Like you're actually, you're creating the work. 00:12:49 Speaker 1 Yeah, yeah. 00:12:50 Speaker 4 It needs to be proactive, eh. 00:12:52 Speaker 2 Yeah. 00:12:52 Speaker 1 And then if you could come right demand like that, imagine a system which can create demand for a city, and then we could, over time, build it for a whole city. You can imagine, you could create demand anywhere, you just go, if you wanted to go into Melbourne you could, because you could just create demand in that city, right? It's just like a repeatable service. 00:13:11 Speaker 2 Yeah, so what we're trying to, I guess what we're trying to do is get that intel really quickly. Bottle it up. Because, I mean, we could pay someone to go and read, you know, 70 LTPs, but, 95% of the information in there is kind of like, it's not relevant to what we're trying to do. It's getting into that data. 00:13:37 Speaker 1 The challenge with that though, someone's going to read all that, and six months later they're going to go, now I understand it, what does this actually mean, and then they've forgotten the first thing. I think one of the benefits of AI, right, as we know, is it's great at connecting dots, so as long as we can get it, as long as we can have a, there's clearly a development process to do this well, but there's something in there which I think should be explored. So I'd love to try and trigger. I'd love to try. and clarify what would a proof of concept look like and what would be like a great outcome which we could try and yeah strive for because if there's any. 00:14:08 Speaker 1 work following this piece of work would be potentially to actually nail down a. 00:14:12 Speaker 2 proof of concept for you guys yeah totally I mean this inherently this look this I see if we just focus on the LTPs for a starter there's either two ways you could do it conceptually which is you either get someone to just go and download them all off the internet and dump them into something and tell it how to find the relevant information or even better thinking it goes and finds because these things are all public documents so it goes and finds them or the annual. 00:14:44 Speaker 2 plans or as well and stuff and actually searches them, online and comes back I don't know how easy that is. We would just need I mean. 00:14:54 Speaker 1 all plans I guess would have would be some would be PDF some would be websites. Are they all PDFs? They're all PDFs. Yeah I was gonna say most of them are yeah. 00:15:03 Speaker 2 So sometimes they're broken down into sections because they're so massive. Yeah right. So a website will be like part one part two part three. If someone on your end could. 00:15:11 Speaker 1 just put a spreadsheet together and and just like paste some URLs that would be a great start and then we could use that and eventually one between us we could have a have a long list. Yeah. Eventually that long list could be created. It's a finite list because there's only. Yeah yeah there will only be a hundred or or sixty or eighty. There's about seventy. Yeah and then the work on our side is okay as it was just like there'd be a piece of work to get the current list done and then does that like change every whatever it's like yeah those little things we could we could work on a way of it being self. 00:15:42 Speaker 1 documenting if possible because if AI can search the web for the thing then AI could search the thing every month and get the latest whatever that's like we have done but look initial let's say we used five urls we'll just find five urls and then our process would be take that pdf download it extract the data out of the pdf in a way that the llm can read it properly yeah and then we would chunk that down whether it be by section by whatever essentially some sort of a process where we turn this 200 page document into maybe a thousand chunks of useful information. 00:16:16 Speaker 1 which then we tag and metadata and then we start extracting off each of that we have to essentially do some process to get it from current state to end state yeah and that is a bit of a black box right now or you know a bit of a question mark yeah but if we if we carry on with what you're thinking let's say we used five examples or even just two yeah, What could an example output be, even just looking at one document or two documents. 00:16:44 Speaker 2 It would be... 00:16:45 Speaker 1 What structure could it look like. 00:16:46 Speaker 2 Oh, look, I think it's a table. 00:16:49 Speaker 1 A table. 00:16:49 Speaker 2 A table, and probably in Excel, because then you can add it. A table that just has some really basic information, which is client counsel, department, service, and contract, and then expiry date or commencement date. It's kind of something along those lines, you know, because that's sort of like... 00:17:17 Speaker 1 Those are... 00:17:17 Speaker 2 Those are the trigger things, right. 00:17:19 Speaker 1 Those are super easy. 00:17:19 Speaker 2 And we'll be able to go, oh, we know the person there who we can talk about. 00:17:22 Speaker 1 Perfect. I said, will they also... And then any other relevant information might be... But is it typically going to be that structure that's going to be buried in that document somewhere. 00:17:29 Speaker 2 Yeah. 00:17:30 Speaker 1 Somewhere in there, they're going to be like that, because I've never written myself. 00:17:33 Speaker 2 Or you can read between the lines, but where you can say... I mean, they have, because they have to say, hey, our contract is expiring in, you know, in 2027, so we're, you know, or we're, you know, like, you know, I may use that community halls example. It's a service change, so they have to tell the public that. So it's just, you know. there'll be key things that you know like keywords or things like review and. 00:18:03 Speaker 4 there is yeah we're reviewing this like if you read them they'll have yeah yeah yeah yeah there's very specific words in them that basically say what they're. 00:18:14 Speaker 2 gonna do yeah right or if you're looking at the financials that you could use to pull out you look at it because they might have a financial over the 10-year period and you can read it down the line and see a spike yeah. 00:18:27 Speaker 4 there you go that's as well so it might go which would mean they're budgeted for. 00:18:32 Speaker 2 it yeah it might be 10 200 yeah oh yeah okay so what's happening on you know year three that's where they're spending like 200 million bucks like what is that yeah so even if it's we don't quite know but we know that that's when they're planning to spend some money it'll pop well you. 00:18:50 Speaker 4 know because it'll be and I was gonna say it's bound to be somewhere else that actual expenditure will be somewhere else in the country, you, documents, you're just about finding it. 00:18:59 Speaker 1 Yeah, so I think that's a great point. I reckon one approach here could be to take one document, just one, and try and work out a way of extracting that document, especially if someone on your team knows one document really well. Then we can actually, it's actually easier to judge AI's output, but if we can work a system, even if you know the answers, which is great, the question is can we get the AI to know the answers that you know reliably, and if we can do that on one document, then we can do it on two, and then three, and then four, so rather than trying to boil the ocean initially, I'm trying to think, what if we pick one, document that maybe is familiar with everybody. 00:19:31 Speaker 4 Yeah, that all encounters. 00:19:31 Speaker 1 Because we might end up finding, yeah, we might find a lot of this kind of thing, right? Yes, maybe the document has ABC, but actually the real information's where the AI should now run a research task across that thing and find information elsewhere, and then collect that, and that could also make part of the table as well. So maybe it's like a multi-step process to really enrich, so you kind of have extraction, and then enrichment, if that makes sense. What I mean by that, it goes extracting, extracting data from. the table and then enriching that data potentially with other sources, which might be news sources. 00:20:03 Speaker 1 or other council website sources or whatever. 00:20:05 Speaker 4 There'll be other council documents, basically, aren't there. 00:20:09 Speaker 2 Well, as you were saying, the long-term plan, that's more holistic, right across all council services, but a big part of our business is waste. management as well and they that like again they have a standard they have their own plan right. minimization and management plan what wm mps they're called and so they're again like an lgp you have if you're a council you have to have one and it has to have two so we need to read. 00:20:42 Speaker 4 those as well yeah it's not so one of those yeah because they don't tell everyone needs to be in it because it's another sort of piece yeah um because even if you want to i'm sitting here thinking about the library right i don't know if you guys do library but that they've got to have their own plans as well that'll be different again so even yeah so auckland council's got their main overview but then they've got like you said they've got their wastewater plan they've got their water plan they've got their transport plan you actually i'm guessing you want to quote all of them right. 00:21:13 Speaker 2 uh we do and um but normally, for for the for the council like auckland council is a bit of a different beast because it's got, It's so big and it's also got these CCOs like to do like water care and Auckland Transport although Auckland Transport is being sucked back in but so probably a better example would be like a medium-sized council like Waikato District or something like that because then those are just sections of the LTP like so they're broken down by groups so it'll be like infrastructure group, community services, those sorts of things. 00:21:52 Speaker 2 And there's certain areas of the council's activities that we'd be more interested in. 00:21:59 Speaker 4 Yeah like for example right I live in Waipa, small district council but very wealthy. Our race course is going to be turned into 700 houses or something like that. 00:22:09 Speaker 5 Alright. 00:22:10 Speaker 4 That plan for that is already in, it's been out in paper for two or three years. They're miles away from doing anything. Right, right. But people like you would already be wanting to quote some of that work, right? Yes. Because they've got to be right, literally there's nothing there but a race course. 00:22:28 Speaker 1 Right. So everything has to be done. 00:22:29 Speaker 4 Everything has to be done. When we brought our house a year or so ago, they're nowhere near building it, but they've already got easements for the roading and stuff. So the planning for that is so far out, but you guys want to quote that well before it happens, correct. 00:22:45 Speaker 2 Well, because what we do is often even further. 00:22:50 Speaker 4 Back before that. 00:22:51 Speaker 2 Before, like, so if you're talking about a service or like, if you're talking about water infrastructure, for example, like we would be, we don't, we're not designers or... you know we it's once they say this is the project and this is where we're going to do it and all that it's almost too late for us yeah we're there we're there oh you know should you yeah should you, sell this land develop this land you know build you know like where should you you know who do you. 00:23:25 Speaker 2 need to get on board to do your wastewater treatment plant you know how much is it going to cost you, over 20 years, that's the bit that we do. So that's right, we do, we help them with the planning. 00:23:36 Speaker 4 That's right at the beginning, right? That's right at the beginning. 00:23:38 Speaker 2 Yeah, so what we wanna know is like. 00:23:40 Speaker 1 So probably like, we look at like, Northwest or something, where Costco went in. A long time ago, somebody thought Costco, Bunnings, Park Pick and Save, like, that entire, someone's gonna do something with a billion dollars in the next 10, 20 years. But before that. 00:23:55 Speaker 4 they had to put in roading, they had to put in pipes, they had to do all of that stuff before anyone even did anything. 00:24:00 Speaker 1 There's obviously transports to put roads in and bull houses and there's so much, yes. 00:24:05

Speaker 4 And you guys are right at that beginning stage. 00:24:07 Speaker 2 Well, yeah, so that's where we, like, so we would look at a, like, let's say we looked at a 10-year long-term plan. We would be, it might be, the first seven years, might show that the wastewater treatment plant, is just ticking along and it's a, it'll have, 50-50, 50-50, and then you see this big spike, and then you know that, well, that's because they're budgeting for, they don't, for replacing that piece of kit, you know, 00:24:37 Speaker 2 because it's at the end of its useful life. That's how we use that information. So we know that in five years' time, they've got a potential project on their books, which is to renew their wastewater treatment plant. 00:24:51 Speaker 1 Yeah. 00:24:51 Speaker 2 And so we work our way back and go, well, three years out, we're going to be talking to them. 00:24:56 Speaker 1 Yeah, cool. 00:24:57 Speaker 2 So, like, you know, procuring the designers, the contractors, the new maintenance. Yeah, great. 00:25:05 Speaker 4 So that very first mention in the plans are your first real trigger, aren't they? Yes, they are, yeah. So the really first thing about this is, you know, this is what we're looking at reviewing. Yeah. That's actually the trigger. Once you get to the stage where Race Scores Road is at, you guys have already done your work. 00:25:25 Speaker 1 Yeah. Okay, great. All right. So does that sound like an interesting approach? Yes. To perhaps, for us to work with just a single document and basically hone and refine a process which could work with a single document, refine the outputs, refine what that could look like, test them in the technology, and then if that can work across a single document, that could prove a concept, which could then justify further investment, which might be, if it's going to work for one document, it could work for 50, it could work for 200 documents. It could work in New Zealand, it could work in Australia, 00:25:56 Speaker 1 it could work whatever. Same idea. 00:25:59 Speaker 4 What do you see as the outcome? So how do you envision the end? So I kind of get to where you want, right? But how do you want it to look. 00:26:09 Speaker 2 I don't think it doesn't have to be flash. It just needs to be... It needs to be, as I say, like, it can simply be a spreadsheet that has, like, these are all the councils, and these are our council clients. This is a list of, like, the different activity areas, I suppose. Yeah, yeah, yeah, like water, the service areas, yeah. Yeah, it's all standardised, so we can filter by that. And these are the, you know, the big investment areas and projects and contract renewals and all that sort of stuff. 00:26:43 Speaker 2 And so having all of that in one place, and us just being able to use it to inform our, like, okay, so who are we going to go and talk to over the next few months. 00:26:51 Speaker 1 Yeah, cool. 00:26:52 Speaker 2 So, you know, the fields that I talked about, or the columns, don't have to be... too massive to start out yeah because you'd start with that and then go okay well if we want to do some smarts how do we you know yeah i think that's the base and work out from there. 00:27:07 Speaker 1 i think that's great i think that i think the starting point basically a really sophisticated extraction system is for me what feels like a great starting point and then once it's actually being used by the team and the first time you guys sit around the table and look at this list, you might start going okay how cool would it be if we could also do this other thing or if that becomes then your trigger in action so then your if this happens and if it's this thing why don't you also do more research and that's you can start to maybe build out more um agentic processes or ai processes maybe cross-referencing it against your crm data maybe previous job data. 00:27:41 Speaker 1 maybe yeah looking up linkedin to look for who's whatever all those kind of other things might reveal themselves as being added value benefits yeah um but none of it will be possible unless you've got the basics done yeah yeah exactly we're reliably extracting data from these sources. 00:27:58 Speaker 2 because what we're trying to do is is stop this kind of we have these meetings and we go does anyone know yeah yeah it's kind of you know what's happening yeah at yp district you know yeah does anyone know anyone there yeah what's happening you know and it's just random whether whether someone goes, oh yeah yeah i know you know i know their infrastructure manager you know, or whatever yeah you know like it's kind of we we fall into this trap of not doing it methodically and scientifically yeah so how cool so so a vision could be. 00:28:34 Speaker 1 spreadsheet or basic web app with a table look search and filter contract sparring next four years and it just shows you everything it's like by district by service and you guys just eyeballing it and going oh yeah we know that and that's where you guys just in a room chat like oh I forgot about that oh I didn't know that but it's the fact that it's there in your mind outside out of mind it's now inside in mind it's essentially brilliant yeah and then you. 00:29:00 Speaker 4 guys can just basically make your own plans yeah we go back to the session we had before we were talking about the what were they the method and the track record and how we were going to use the knowledge yes yes yep we could use that same concept to get all the past jobs to complete half of it, Then you've got, you've got all, can't you use that same extraction methodology to actually get all the current ones that are going to expire. 00:29:30 Speaker 2 Potentially. 00:29:31 Speaker 4 And get that time frame internal. 00:29:33 Speaker 2 Oh, you mean from our own data. 00:29:35 Speaker 4 Yeah, from your own data. That we've already worked on, so we can go back and see what we've done before. And that's what I'm, is that complete. 00:29:41 Speaker 1 Yeah, that's part of. 00:29:42 Speaker 4 So that's half of it, basically, is the knowledge they've already got. The other half of it is the knowledge from the web. 00:29:48 Speaker 1 Yeah, that's right. So you can kind of imagine phase 1.1 is extracting data and then enriching that data with previous data as well. And then you could imagine like this system becomes very sophisticated. But so useful. It has to stay simple, but great. 00:30:05 Speaker 2 Simple is good, eh. 00:30:07 Speaker 1 Yeah. Keep it simple. It's key things. 00:30:10 Speaker 3 Are there also some spreadsheets floating around with contract expiry dates. 00:30:14 Speaker 1 And that might be it. 00:30:16 Speaker 4 And just reading that all into one place already. 00:30:19 Speaker 1 If there are examples of that, essentially what we took, like your example of, you could hire someone to do it full time. Or you could just have a system which does it automatically. And it's like self-documenting. And every month or whatever, I don't know whether it be a weekly process or monthly process, there's some sort of a recheck. Do these things get announced by the news or anything? Do they just kind of get announced. 00:30:41 Speaker 2 No, not until it's too late for us. Yeah. 00:30:46 Speaker 1 Do you get notified of new documents? Do you guys have an email inbox where it's like, Inquiries at Morrison Lowe. And someone will get a subscription, RSC's feed. Are there things like that? I don't know. That'll be RSC Speed, all of them. And then whenever we trigger it, like the same minute, we just know it's there. 00:31:08 Speaker 2 When you say that, what do you mean. 00:31:10 Speaker 1 So just like, imagine like, RSC Speed is every website. someone let you subscribe to it, someone we might have just scraped or something. Imagine like a blog. Let's say someone released a new blog. Boom. That minute, that thing gets posted with a date and timestamp. Typically, an RSS feed system is listening for a new entry of a system. 00:31:32 Speaker 2 A new plan. 00:31:34

Speaker 1 So if we had a finalist of sites, 60 sites, 100 sites, potentially each one of them either has some kind of RSS feed, which we could tap into, or we could make our own version. So every day we're listening for something new. And that is a trigger. Let's say that they've announced something. Our system could listen for an announcement and boom, scrape it in. 00:31:54 Speaker 2 So it's not like, you know, it's not happening every day or week. 00:31:59 Speaker 1 I know, I imagine it's not. 00:32:01 Speaker 2 You know, like you've got your, so if you look at the LTPs, they're a rolling like three year plan. So they look out 10 years. And so currently councils are 24 to 27. So now they'll be working on, they'll be working on the, their next LTP iteration which will go from 27 to 30, but it still has a 10 year forecast in it for everything, but it's detailed for that 3 years, and then they release an annual plan which updates it, so it's like 10 year, 3 year annual cycles, and there's no monthly check-in updates, but it's useful to look at the annual plans each year when they come out. 00:32:46 Speaker 4 because they come out at about April-ish. It's always the same time, right, because they're going to the fiscal year. And they actually ask for the public submission, so that's why I read it, because I want to give them like 10 cents. 00:32:59 Speaker 2 So your LTP is like a, imagine your, if you think about it like a household, your LTP is like, oh, in 10 years I want to pay off my mortgage. Yeah. And three years is like, this is what I'm going to be doing for the next three years because I know that I'll be working, what my salary is going to be for the next three years. I can work that out quite accurately. And then the annual plan is that, well, this is what I'm paying. Yes, fortnight or each month. Yeah exactly what it is. So yes, it's a level of accuracy. 00:33:34 Speaker 2 Yes, and so that annual plan changes. It does tweak and change we can change what the long-term plan sort of. 00:33:41 Speaker 4 If you get a change of Mia, you get a bigger change. 00:33:44 Speaker 2 So right. So yeah, the LTP is really useful to us because it, Was really long-term things are always in there. 00:33:53 Speaker 1 Yeah, they are and even even law even government changes what can't they don't know that I've raised those They will just change the next subsequent three-year plan. Yeah. Yeah, it's only the council to decide that their priorities might change. 00:34:05 Speaker 2 Very interesting. That's super interesting. Yeah, so I think from here just think about. 00:34:14 Speaker 1 You know, it doesn't matter. Yeah, just because we have to get a bit The office, but I think it's awesome stuff. It's been such a great meeting. I think it's been awesome Yeah. 00:34:29 Speaker 3 In the time. 00:34:29 Speaker 1 Yeah, yeah, yeah, but it's I think it's been a good message. I think three hours has been great. Like it's easy to, Talk longer, but I think it's just been awesome, Yeah for me I'm thinking about the next steps and I think maybe picking one plan could be great We could do some initial looking on our side and yeah start, Massaging like what this thing could look like. There's a lot to process on our end, but I've got AI transcribing everything So yeah, I'm gonna use I'm gonna definitely use my own dog food and and boom three transcripts three summaries. 00:35:03 Speaker 1 It's going to help us to I can see those as well if we want to help us to, Solidify, I think creating clarity is like definitely the the key thing from here So we're super clear on the three objectives and in plans and then with it Then we all be able to really run as fast as we can to them to the next steps and the next meetings We'll book and and all that sort of thing. Yeah, and my role I guess. 00:35:26 Speaker 2 From my perspective is to say just to kind of like try and tighten the scope of this Yeah We're not trying to bite off Yeah, you know because like we're gonna get and and I are gonna have to well, we're accountable. Almost this is more with us Like if we can show something that's that like a proof of concept like this this big but works really well It's better than like. 00:35:58 Speaker 3 The brains of fire, yeah. Yeah Yeah, yeah. 00:36:04 Speaker 2 Because the people that we're engaging with internally, like our senior leadership, are miles behind, you know, where we are. 00:36:13 Speaker 4 In their uptake. 00:36:15 Speaker 2 Well, yeah, in their uptake, but also their kind of, like, conceptualising of, like, how this could actually work. 00:36:22 Speaker 1 They're really trusting this process is going to help reveal certain benefits to them. 00:36:27 Speaker 2 But they'll be like, well, what are you doing and where is it? But, you know, like, because they still have that, I mean, to a degree, they have that mindset of, like, you look around and you decide what you're going to buy and you buy it and then it's there. 00:36:39 Speaker 5 Yeah. 00:36:40 Speaker 2 Whereas, that's not the case. 00:36:41 Speaker 1 This is more development. Yeah, it's like, it's kind of like, yeah, it's like gardening. You plant some seeds and you go away and you've got to water it every day. Maybe we'll start seeing some shoots in a few weeks. And if we've done the right job, it'll be a fruit tree in a minute, in enough time. 00:36:57 Speaker 3 We are very fortunate that the company does want to invest, they know it's important, they understand the value, so we are very lucky that we actually are in an environment where they want to invest and explore, so it's, yeah. 00:37:12 Speaker 2 But they're just results driven, right. 00:37:14 Speaker 3 But they do, yeah. 00:37:14 Speaker 2 Fair enough, yeah. 00:37:15 Speaker 4 Yeah, we're finding that constantly, eh? Like, we're so far ahead in our mindset that the average person hasn't quite, they haven't got there yet, and we quite often have to stop and think, oh, that's right, they don't get that. They haven't got there yet. You know, because we've been living and breathing it for 15, 18 months now. 00:37:36 Speaker 3 I mean, we do have an internal program that we need to sort of really get. That AI fluency. 00:37:44 Speaker 1 Yeah, really cool. 00:37:45 Speaker 4 It's about, you know what I think really gets buy-in? Is if you can show them that one little thing that's going to actually make a difference in their little world. That's what the invoicing thing is. That's, I hear you, yes. It's more, hey, wow, cool. Yeah. I want more. 00:38:00 Speaker 5 Yeah, yeah. 00:38:00 Speaker 4 Yeah, and that's, yes. I think that's what we need to focus. 00:38:05 Speaker 2 When I reflect on this morning, it's probably, possibly could be the trickiest one. Yeah. Which one. 00:38:12 Speaker 1 The invoicing? Yeah, yeah. The easiest. Actually, because this output of this document could be relatively quick compared to an invoicing application, which could be much longer. Yeah, who knows, right? It's funny, right? Yeah. 00:38:27 Speaker 4 Having said that, we've done a few invoices, so we've got a bit under our belt on that one. 00:38:34 Speaker 1 It still doesn't mean it's easy, it just means it's straightforward. Actually, this knowledge one, if we try and boil the ocean, it's a big job, but if we just focus on extracting data from a PDF, that's actually relatively straightforward. It's a bit of scoping and a bit of development, and we'll go, here it is, does it look good? If you're like, no, okay, we'll try again, does it look good? Yeah, pretty close. That's much easier than how do we roll out an invoicing platform, because we've got change. 00:39:06 Speaker 1 management with invoicing, at least because the part that's hard with invoicing is that you're changing people's processes. The part that's not so hard with the extraction of data is you're not changing anything, you're creating something out of nothing. So if you're just like, sweet, or not sweet, there's no change in our behaviour, it's just much easier in terms of the change in our environment. Yes. Um, I love you, but I'm watching with my husband. That's been a really cool, um, guys, thank you so much. I love you guys, but I want my husband back.

Meeting Summaries:

- Summary 1

  11-13 Consultation: AI Transcription Standardization and Invoicing Automation Quick Wins Date & Time: 2025-11-13 09:00:26 Location: [Insert Location] Customer: [Insert Customer] Overview The consultation focused on evaluating and trialing AI-driven transcription tools and designing a pragmatic, low-effort invoicing "quick win" to build organizational buy-in for broader AI adoption. The team currently favors Fireflies for meeting transcription due to better diarization and usability, but has concerns about accuracy, security, and cost at scale (e.g., 30 staff at ~$500 per person per year). In parallel, the business uses ProjectWorks for project management and invoicing across New Zealand and Australia, but relies on a highly manual Word-based process to compile monthly invoices exported to Xero. The primary invoicing challenge is inefficiency and workflow disruption during billing cycles caused by fragmented data, weak approval flows, and inconsistent timesheet notes. Desired outcomes include:

  - A centralized, guided invoicing interface that automatically pulls ProjectWorks data, leverages AI to summarize notes against Statements of Work (SoWs), supports human review/override and carry-forward logic, and streamlines approvals and formatting.
  - A standardized transcription approach balancing diarization accuracy, security, and cost for multi-speaker sessions, with best-practice SOPs (e.g., speaker introductions).
  - Exploration of a medium-term, domain-tailored transcription/workflow solution that integrates legal/financial nuances and can automate downstream outputs (e.g., proposals). Background
  - Stakeholders span IT360 and Morrison Low: Matt, Rochelle, Sandy, Christina (project support lead), Roxy (project support), Karen (joining for proposal section), and finance/management (e.g., Anna). Christina and Roxy coordinate invoicing tasks.
  - Transcription tools trialed over the last 15 months include Fireflies, Plaud, Teams, and others (~five tools); Fireflies is preferred for multi-speaker accuracy and usability. Teams was reported as poor for diarization.
  - Meeting formats include client interview days with eight sessions in a row; starting with participant introductions improves diarization.
  - Invoicing is project-based with bespoke monthly narratives justifying amounts. Consultants enter timesheet notes in ProjectWorks with variable quality; PMs consolidate notes, budgets, WIP, forecasts, prior-month narratives, disbursements, and time into client-facing invoices, often applying value-based overrides (e.g., billing $8,000 instead of $10,000).
  - The internal Word template acts as the "central brain" aggregating data across 10–12 active projects per consultant. WIP is accessible via PDF/CSV; ProjectWorks

API exists but schemas are difficult to join (time invoiced vs net of GST, disbursements).

- Operations span multi-currency and multiple Xero instances per company; invoices are generated in ProjectWorks and exported to the appropriate Xero. Pain Points Transcription accuracy, diarization, cost, and security:
- Accuracy issues (especially diarization) reduce trust in AI summaries and require post-meeting cleanup. Meeting rooms are a challenging scenario; diarization is rarely 100%.
- At-scale subscription cost (~$30/user/month or ~$500/year/person for ~30 staff) creates budget strain and hesitancy to roll out broadly.
- Security and compliance concerns limit broader adoption without clear vendor assurances. Manual, fragmented invoicing workflow:
- Monthly billing disrupts consultant flow; preparing 10–15 invoices is a hassle, with slow approvals and manual consolidation across ProjectWorks tabs and the Word template.
- Consultants and project support spend substantial non-billable time (e.g., ~4 hours per consultant monthly; totals cited like 120 hours per month and 1,400 per year across the team).
- Inconsistent timesheet notes hinder AI summarization and narrative clarity; PMs must "weave" ~30 inputs and ~100 hours into five SoW-aligned bullet points.
- Data integration challenges: difficulty linking reports to forecasts, invoices to expenses; oversized/unwieldy tables; reliance on PDFs/CSVs for WIP.
- Tension between consultant flexibility (value-based overrides) and finance/project support needs for precise line-level accuracy and carry-forward tracking. Manual "wiggling" of line items to hit targets (e.g., $8,002) and ensuring unbilled time carries forward correctly adds friction.
- Reporting gaps: inability to run service line/sector reports ("asset management") natively in ProjectWorks leads to weekly manual VLOOKUP merges. Expectations Quick-win invoicing automation to build buy-in:
- Reduce manual invoicing effort with a centralized dashboard that ingests ProjectWorks data (timesheets, WIP, budgets, forecasts, prior-month notes), provides role-based views (consultant, project support, finance/accountant, director/PD), and orchestrates approvals with push-back and audit trails.
- AI-assisted summarization of granular inputs into ~5 SoW-aligned bullet points, with human review and manual override of amounts (e.g., charge $8,000 instead of $10,000), preserving value-based billing and keeping raw timesheet breakdowns internal.
- Intelligent override and carry-forward logic: set a target amount, auto-select/adjust lines to match closely (e.g., $8,002), flag remaining entries to carry forward with traceability.
- Output formatting consistent with current Word/PDF style (HTML-to-PDF acceptable). Monthly cadence targets completion by the 5th–6th to reduce end-of-month disruption. Transcription standardization:
- Select and standardize on a transcription tool (currently Fireflies favored) that balances diarization accuracy, acceptable security posture, and manageable cost at scale.

- Establish SOPs (e.g., begin meetings with speaker introductions) and consider month-to-month licensing for flexibility. Medium-term tailored solution:
- Explore building an industry-specific transcription/orchestration layer that integrates domain knowledge (legal/financial), supports proposal generation, and leverages internal knowledge bases.
- Maintain cost awareness; a slight premium is acceptable if value is clear. Success Metrics
- Invoicing: reclaim ~4 hours per consultant monthly; faster month-end close (by the 5th–6th); accurate carry-forward; fewer approval pushbacks; consistent five-bullet narratives aligned with SoW; improved timesheet note quality over time.
- Transcription: improved diarization accuracy and reduced post-meeting cleanup; positive user satisfaction; acceptable per-user annual cost (~$500 benchmark); validated security posture.
- Reporting: elimination of weekly VLOOKUP merges for sector/service line insights; faster decision-making. Other Information Summary
- Starting meetings with participant introductions significantly improves diarization.
- Fireflies is currently preferred; Plaud used personally by one participant; Teams considered one of the worst for diarization accuracy.
- Trials included ~five tools across the last 15 months; ~four users have been actively testing.
- Month-to-month vs annual licensing plans are under consideration to maintain flexibility pending potential custom build.
- The Word-based invoice template is internal-only; clients never see it. The team is open to HTML-to-PDF outputs matching current aesthetics.
- Early experiments with Copilot summarizing timesheet PDFs indicate interest in embedding AI summarization into guided invoicing workflows.
- Process mapping will be led by an automation specialist (Sunday), with short follow-up screenshares (e.g., half-hour) to capture real workflows. To-Do List
- Document the current invoicing workflow end-to-end with Christina and Roxy; identify automation opportunities. Stakeholders: Christina, Roxy. Deadline: [Insert Deadline].
- Schedule half-hour screen-share sessions with project support (Christina, Roxy) to observe invoicing end-to-end. Stakeholders: Project support, consultant team. Deadline: [Insert Deadline].
- Gather detailed requirements and produce a PRD: data sources/fields/mappings (time vs disbursements), AI summarization rules, approval workflow, role-based views, and UI components. Stakeholders: Consultants, PMs, Finance/Admin, Directors. Deadline: [Insert Deadline].
- Audit ProjectWorks API and CSV/PDF outputs; design robust data models linking reports, forecasts, invoices, expenses, WIP; include multi-company/multi-currency handling and Xero export workflows. Stakeholders: IT/Developers, Finance. Deadline: [Insert Deadline].
- Collect sample SoWs, timesheet notes, prior-month narratives, and invoice templates to tune AI summarization; integrate training notes (Karen, Dan) as in-

app guidance to improve note quality. Stakeholders: PMs, Consultants. Deadline: [Insert Deadline].

  - Design a centralized dashboard mockup (consultant and PM views) with AI "magic wand" summarization, prior-month context, selectable tasks, and manual override fields; validate HTML-to-PDF styling. Stakeholders: UX/Product, PMs, Consultants. Deadline: Before next billing cycle (target by the 5th–6th).
  - Define and implement an approval workflow with role-based checkpoints and audit logs; ensure final human review before sending. Stakeholders: Finance/Admin, Directors. Deadline: [Insert Deadline].
  - Build and test intelligent override/carry-forward logic to match target invoice amounts and preserve unbilled time with auditability. Stakeholders: Project support, Finance. Deadline: [Insert Deadline].
  - Confirm SOP for transcription sessions (e.g., speaker introductions) and publish a quick user guide; validate security requirements and vendor documentation for Fireflies; perform cost scaling analysis (e.g., 30 staff at current rates; month-to-month vs annual). Stakeholders: IT/Operations, IT/Security, Finance, Consultants. Deadline: [Insert Deadline].
  - Outline a roadmap and feasibility study for a tailored transcription/orchestration solution, including knowledge base integration and proposal generation. Stakeholders: IT/Engineering, Legal/Consulting Leaders. Deadline: [Insert Deadline].
  - Plan a follow-up session focused on sector/service line reporting to replace weekly VLOOKUP tasks. Stakeholders: Project support, Finance/Management. Deadline: [Insert Deadline].
  - Schedule next sessions with Karen for the proposal section and with Matt/lead for the final section. Stakeholders: Karen, Matt. Deadline: [Insert Deadline]. AI Suggestions
  - Implement a lightweight invoicing automation workflow: auto-populate invoices from ProjectWorks timesheets/engagement data with a review-and-send step to cut monthly time by a couple of hours per consultant.
  - Build a centralized guided invoicing app with role-based views and approval flows (push-back, audit trails), integrating AI summarization of timesheet PDFs and SoW-aligned narratives.
  - Add intelligent line selection and carry-forward logic: set target amounts; auto-select optimal line combinations to hit the closest figure (e.g., $8,002); flag remaining entries to carry forward with full traceability.
  - Integrate transcription outputs with invoicing triggers: tag billable sessions in Fireflies and generate draft invoice line items tied to meeting metadata.
  - Create standardized templates and checklists for common engagement types, plus a short SOP to ensure consistent, rapid invoice completion.
  - Improve timesheet note capture with in-app prompts and optional voice notes that auto-structure entries, enhancing downstream AI summarization accuracy.
  - Address reporting gaps with a quick-win module to filter forecasts/performance by sector/service line, eliminating weekly manual VLOOKUP merges.
- Summary 2

11-13 Meeting: AI Copilot for Proposal Generation 🔑 Keywords Proposal Generation, AI Copilot, Track Record, Project Costing, Methodology, Project Works, Proposal Automation ⏰ Meeting Information Date: 2025-11-13 10:10:00 Location: [Insert Location] Participants: [Speaker 1], [Speaker 2], [Speaker 3], [Speaker 4], [Speaker 5], [Speaker 6], [Speaker 7] 📝 Summary of Discussion The meetings focused on leveraging AI to streamline the organization's proposal generation process, with a secondary focus on improving project costing and data management. The primary goal is not to fully automate proposal writing but to create an "AI co-pilot" to assist with the most time-consuming and challenging sections. Key Pain Points in Proposal Generation Across the discussions, three critical pain points in writing proposals were consistently identified:

1. Track Record: Finding and summarizing relevant past projects to demonstrate experience is a major, time-consuming manual effort. It involves searching for old jobs and asking colleagues for information.
2. Methodology: This section is highly specific to each proposal and requires significant effort to tailor, even though there are similarities within service lines.
3. Understanding of Requirements: Accurately capturing and articulating the client's needs is crucial and time-intensive. A secondary pain point is creating the pricing breakdown, which is derived directly from the methodology. Proposed AI Solution: An Intelligent Co-pilot The consensus shifted from a fully automated "AI vending machine" to an AI-powered assistant or "co-pilot" that augments the human writer. The core of this solution would be a well-structured internal data library, described as an "intelligent search" or "Netflix for Proposals." Intelligent Search & Data Library: The foundational idea is to pre-process and tag 25 years of historical documents (proposals, final reports) with metadata like keywords, summaries, client, market, and service line. This would create a searchable database, solving the issue of poorly filed documents and enabling quick retrieval of relevant information. AI as an Assistant: The AI co-pilot would use this structured data to: Draft Track Record: Suggest relevant past projects based on the new proposal's context. Develop Methodology: Analyze past similar jobs to suggest methodologies, flow charts, and options for the user to select and refine. Write "Understanding of Needs": Synthesize information from client meeting transcripts, emails, and internal brand messaging to create a first draft. Act as a Reviewer: Check proposals against a set of "golden rules" for best practices, such as ensuring the client benefit ("the why") is clearly explained. Project Costing, Budgeting, and System Integration The discussion also covered inefficiencies in the current project costing and management workflow. Inconsistent Costing: The process for creating project budgets is not standardized; some staff use basic spreadsheets while others use Project Works. This creates data silos and inconsistencies. Proposal-to-Project Workflow: There is a desire to automate the conversion of a proposal's methodology into a work breakdown structure (WBS) in Project Works for costing and project management, avoiding manual re-entry. The current limited integration with Zoho CRM only creates a very basic project structure.

- Time Tracking Challenges: A significant operational issue is the failure of team members to log time against detailed task codes in Project Works. They often book time to a single high-level code, which undermines the ability to track budget vs. actuals at a granular level and use historical data for future costing. Proposal Volume and Scope The team produces a large number of proposals, estimated at around 200 per year. In the last 12 months, there were 133 new jobs, with 91 having budgets over $25k. The focus for automation is on these larger, more complex proposals that require a formal multi-page document. 📅 Next Arrangements
- Schedule 2-3 more meetings to perform a deep dive into the key proposal sections (methodology, track record).
- Conduct a one-on-one session with [Speaker 6] to walk through a proposal in detail.
- Engage with a consultant from the Australian team to get their perspective on formal tenders.
- [Speaker 5] to review example proposals (with sensitive data removed) to identify patterns and data structures.
- Explore building a "track record system" as a specific, initial piece of work.
- Investigate the pre-processing of project documents to create a metadata library for the intelligent search function. 💡 AI-Identified Issues & Gaps

11. Prioritization of Pain Points: While the "track record" and "methodology" sections were identified as the top two pain points, a clear decision on which to tackle first with an AI solution was not made.
12. Lack of Standardization: The project costing process is inconsistent (spreadsheets vs. Project Works), and the ineffective time-tracking in Project Works prevents accurate data collection. These foundational data issues will hinder any AI-driven costing or project management improvements.
13. Undefined Co-pilot Features: The shift to an "AI co-pilot" was agreed upon, but the exact features, user interface, and success metrics for this system need to be defined.
14. Data Governance and Strategy: There is no clear plan for building the central "Netflix library" of data. Key questions around data governance, ownership, structuring, and maintenance for the 25 years of historical documents remain unanswered.
15. CRM Integration Role: The role and future of the limited, one-way integration between Zoho CRM and Project Works within a new automated system is unclear.

- Summary 3

  11-13 Meeting: AI-Powered Opportunity Discovery Platform (POC) Date & Time: 2025-11-13 11:22:40 Location: [Insert Location] Attendees: [Speaker 1], [Speaker 2], [Speaker 3], [Speaker 4], [Speaker 5]

  1. AI-Powered Opportunity Discovery Platform (Proof of Concept) The team discussedf developing an AI-powered proof of concept (POC) to improve the company's process for winning new work. Currently, this process is relationship-

based and relies on manually tracking client information, which is inefficient and difficult to maintain. The core problem is the manual effort required to extract project leads from large, dense public documents like council long-term strategic plans (LTPs) and Waste Minimisation and Management Plans (WMMPs). The proposed solution is to use AI to automatically scan these documents to identify and extract key information about service renewals, new investments, and expiring contracts. This would create a structured, searchable database of potential leads, shifting the team from a reactive to a methodical, data-driven discovery process. The group agreed that a small, well-executed POC is the best strategy to demonstrate value and gain buy-in from senior leadership, who are supportive but need to see tangible results. The knowledge extraction project was favored over a potential invoicing application because it creates a new capability without disrupting existing workflows, making it an easier initial win. The immediate goal is to focus on a single, well-understood council document to prove the concept's viability before scaling. Action Items

- Select one plan to focus on for an initial proof of concept. -- [Speaker 1]
- Conduct initial research and analysis to start shaping what the selected proof of concept could look like. -- [Speaker 1's team]
- Tighten the scope of the proof of concept to ensure it is manageable and can be delivered effectively. -- [Speaker 2]
- Create a spreadsheet containing URLs of a few council LTP documents (a starting list of five was suggested) to serve as the initial data source for the POC. -- [Speaker 2]
- Define the structure for the output, which will be a simple table (e.g., in Excel) with columns for key information such as: Client/Council, Department, Service, Contract details, and Expiry/Commencement Date. -- [Speaker 2]
- Develop an internal program to increase AI fluency within the company. -- [Speaker 3] AI Suggestions AI has identified the following issues that were not concluded in the meeting or lack clear action items; please pay attention:

8. Proof of Concept Selection: While the PDF data extraction project was favored for its simplicity, a final decision was not formally made between it and a potential invoicing application. A clear decision is needed to focus development efforts.
9. Automated Monitoring: The meeting did not establish a clear plan for how to automatically monitor and ingest new or updated council plans. While RSS feeds or web scraping were mentioned, no technical approach or owner was decided upon.
10. Data Source Expansion: The discussion touched upon expanding data sources beyond LTPs to include WMMPs and other plans, but a strategy for prioritizing and incorporating these other document types was not defined beyond the initial POC.
11. Internal Data Integration: The potential to integrate the company's internal data (e.g., from past projects, existing contract spreadsheets) was discussed but not incorporated into a concrete action plan. It is unclear when or how this internal data enrichment phase would be tackled.

12. Senior Leadership Engagement Strategy: The team noted that senior leadership needs to see results, but a specific strategy for managing their expectations and communicating the iterative nature of this development work was not established.