

Where AI will change your workforce, and what to do about it

Harbourview Distribution Ltd

A role-by-role and task-by-task assessment of 94 people in 20 roles, with the capacity at stake, your organisation's readiness and a 12-month path forward.



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SAMPLE REPORT FOR A FICTIONAL ORGANISATION • 24
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EXECUTIVE TEAM

ORGANISATION AI EXPOSURE INDEX



Moderate exposure

Headcount-weighted across 20 roles. 37.2% of people are in High-exposure roles.

HOURS AT STAKE

3,202

per month • ≈18.5 FTE

HIGH-EXPOSURE ROLES

35

people • 37.2% of
workforce

AI READINESS

38/100

8 leaders surveyed

WORK AI CAN DO OR SPEED UP

64%

of mapped task hours

What leadership needs to know

Harbourview is not facing an AI problem across the whole business. It is facing one in the office. Your warehouse, fleet and field teams do work that current AI barely touches. Your contact centre, finance and HR administration teams spend most of their week on exactly the templated, screen-based work AI tools now handle well.

Across the business that adds up to roughly 3,200 hours a month, the equivalent of about 18 full-time people, spent on work AI can absorb or speed up. That is not a case for cutting 18 jobs. It is capacity you are already paying for, and it can be moved into things your customers notice: faster issue resolution, proactive account care, tighter collections and better stock accuracy.

The risk is the gap between exposure and readiness. Readiness scored 38 out of 100, with no AI-use policy in place, so staff are likely already using public AI tools with customer data. The first 90 days should close that gap: set the rules, run one well-measured pilot in the contact centre, and train the people whose work is changing first.

Our recommendations

1. Approve an AI-use policy and an approved-tools list within 30 days. It is the cheapest risk reduction available to you.
2. Pilot AI reply drafting and order-status automation with one contact-centre team, measured against today's handling time and quality scores.
3. Train the 35 staff in High-exposure roles first, and involve them in redesigning their roles so the change is done with them, not to them.
4. Decide now where freed capacity goes (collections, retention calls, stock accuracy) so the time saved shows up in results, not idle time.

- **37.2% of the workforce (35 people)** work in High-exposure roles. Exposure is highest in **Customer Service** (index 72.5).

- About **3,202 hours a month** of current work, roughly **18.5 full-time equivalents**, can be absorbed or accelerated by today's AI tools.

- The single largest opportunity is **process routine order status requests** (Customer Service Representative, 12 people): about **332 hours a month**.

- Organisational AI readiness is **38/100**. The weakest area is **Governance & risk (20)**: no AI-use policy. Staff may already be pasting customer or company data into public AI tools.

- **Customer Service, Finance, Human Resources, Marketing** sit in the **Act now** quadrant: highly exposed and not yet ready.

- **44.7% (42 people)** do hands-on, relationship or judgement-heavy work that current AI barely touches. That is a stable core to build around.

AI EXPOSURE INDEX

49.4 /100

Moderate exposure

HOURS AT STAKE

3,202 /mo

≈18.5 full-time equivalents

PEOPLE IN HIGH-EXPOSURE ROLES

35

37.2% of the workforce

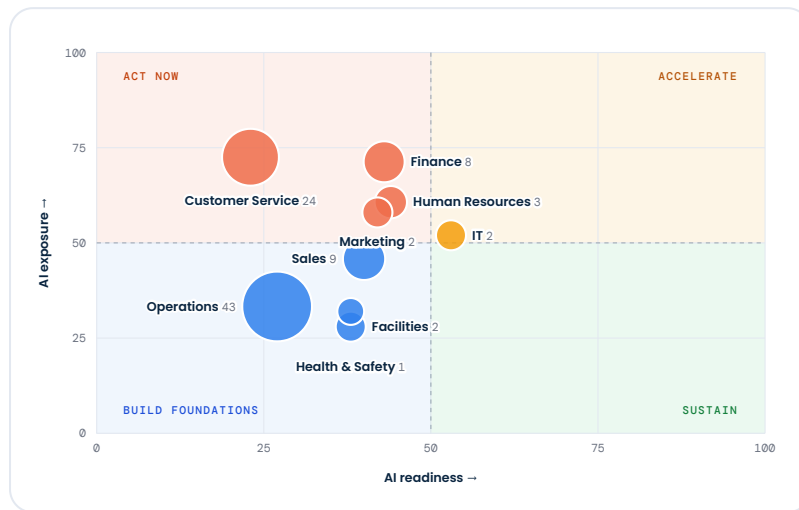
AI READINESS

38 /100

8 leaders surveyed

Exposure against readiness, by department

Each bubble is a department, sized by headcount. Highly exposed departments that aren't ready for AI (top left) need attention first.



● Act now

High exposure, low readiness. The work is changing and the team isn't set up for it yet.

Customer Service • Finance • Human Resources • Marketing

● Accelerate

High exposure, good readiness. Ready to pilot AI in these workflows now.

IT

● Build foundations

Lower exposure, low readiness. Less urgent, but basic AI skills and policy still apply.

Operations • Sales • Facilities • Health & Safety

● Sustain

Lower exposure, good readiness. Keep skills current and share good practice.

No departments

Exposure heatmap

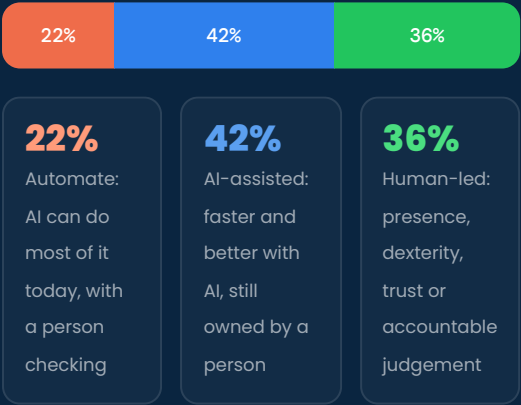
Sorted by the hours of work AI can absorb or accelerate in each department.

DEPARTMENT	PEOPLE	EXPOSURE	HOURS AT STAKE / MO	TASK MIX	READINESS	PRIORITY
Customer Service	24	72.5	1,344		23	Act now
Operations	43	33.3	738		27	Build foundations
Finance	8	71.3	514		43	Act now
Sales	9	45.8	306		40	Build foundations
Human Resources	3	60.7	113		44	Act now
Marketing	2	58.0	81		42	Act now
IT	2	52.0	56		53	Accelerate
Facilities	2	28.0	28		38*	Build foundations
Health & Safety	1	32.0	23		38*	Build foundations

Automate AI-assisted Human-led * No department response; organisation score used

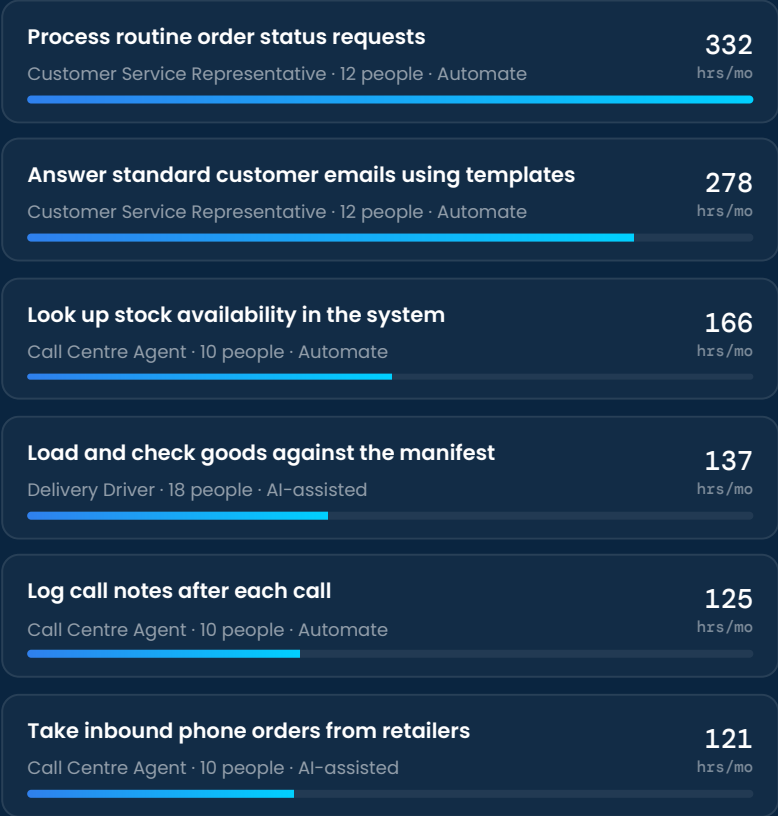
Which tasks AI will change

Every task your teams listed was assessed individually. This is where the hours are.



Share of the task hours your teams described. Hours at stake assume the listed tasks fill 80% of the week and that AI absorbs 60% of “automate” task time and 25% of “AI-assisted” task time.

Ten biggest opportunities



Prepare weekly sales activity reports

Sales Representative · 8 people · Automate

117

hrs/mo

Follow scripts for returns and refunds

Call Centre Agent · 10 people · AI-assisted

104

hrs/mo

Collect signatures and cash on delivery

Delivery Driver · 18 people · AI-assisted

103

hrs/mo

Report vehicle faults to the fleet office

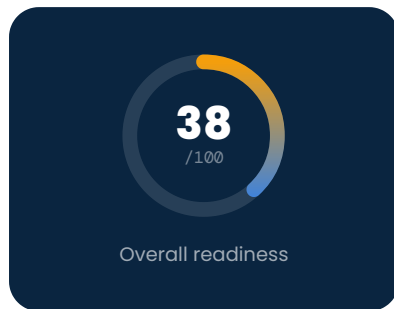
Delivery Driver · 18 people · AI-assisted

103

hrs/mo

Is the organisation ready to act?

From the AI Readiness Pulse completed by 8 leaders. Scores run from 0 to 100.



Governance & risk

20

No AI-use policy. Staff may already be pasting customer or company data into public AI tools.

Skills & learning

38

Few staff have used AI tools at work, and there is no structured way to build the skill.

Data & tools

39

Core processes run on paper, email or disconnected spreadsheets, which limits what AI can plug into.

Leadership & strategy

41

No agreed direction on AI. Staff hear mixed messages and pilots stall without a sponsor.

Culture & change

52

Teams are open to changing how they work and trust leadership to handle it fairly.

What changes in each exposed role

Every role scoring Moderate or High, ordered by hours at stake. Lower-exposure roles are listed in the appendix.

Customer Service Representative

Customer Service · 12 people

72

High

HOURS AT STAKE

772/month

MOST EXPOSED

Answering standard emails using templates

TASK	TIME	AI IMPACT
Process routine order status requests		
AI queries order system and drafts status; person confirms before sending.	33%	Automate
Answer standard customer emails using templates		
LLMs draft replies from templates; person reviews and sends.	28%	Automate
Update customer records in the CRM		
AI suggests data entry from emails; rep verifies and updates CRM.	22%	AI-assisted
Escalate complex complaints to supervisors		
AI flags complaint severity and suggests resolution; rep makes escalation call.	17%	AI-assisted

WHAT CHANGES

Routine email and order replies will be AI-drafted and checked rather than written from scratch, cutting response time. Reps will shift from template-filling to reviewing AI outputs and owning complex complaints.

FUTURE-STATE ROLE

This role becomes a quality-gate and relationship role: reviewing AI-drafted replies for tone and accuracy, handling customers who need human judgment, and spotting patterns in complaints to improve service. Stronger performers will move into account retention, upsell and supervisor-level complaint resolution.

SKILLS TO BUILD

AI output review and verification → AI-assisted customer service

Complaint triage and resolution judgment → AI-assisted customer service

Data accuracy and CRM hygiene → Data protection and internal controls

Customer empathy and retention conversation → Consultative selling and account management

Call Centre Agent

Customer Service · 10 people

76

High

HOURS AT STAKE

517/month

MOST EXPOSED

Taking inbound orders and logging call notes

TASK	TIME	AI IMPACT
Take inbound phone orders from retailers		
AI drafts order summaries and flags issues; agent owns order acceptance and relationship.	35%	AI-assisted
Follow scripts for returns and refunds		
AI suggests refund path; agent owns dispute resolution, judgment and customer trust.	30%	AI-assisted
Look up stock availability in the system		
Real-time system queries return stock data; agent verifies complex scenarios or holds.	20%	Automate
Log call notes after each call		
AI transcribes calls and auto-logs notes; agent reviews and approves for accuracy.	15%	Automate

WHAT CHANGES

Routine data entry and script-following will shift to AI; agents will spend more time resolving exceptions, handling difficult callers, and building retailer relationships. Call handling will accelerate, freeing time for higher-value account care and problem-solving.

FUTURE-STATE ROLE

Call centre agents will focus on complex order issues, customer retention, retailer relationship building, and coaching AI on edge cases. The role becomes a hybrid—part AI operator, part account strategist—with less time on clerical work and more on judgment calls.

SKILLS TO BUILD

AI-assisted customer service → AI-assisted customer service

Complex problem-solving and exception handling → Process automation and exception handling

Relationship and retention focus → Consultative selling and account management

Data verification and output checking → Data protection and internal controls

Accounts Payable Clerk

Finance · 4 people

76

High

HOURS AT STAKE

294 /month

MOST EXPOSED

Entering supplier invoices into accounting system

TASK	TIME	AI IMPACT
Match invoices to purchase orders	30%	Automate
AI matches invoices to POs by line items; clerk resolves mismatches and discrepancies.		
Enter supplier invoices into the accounting system	25%	Automate
OCR and AI extract invoice data; clerk verifies and approves posting.		
Prepare the weekly payment run list	25%	Automate
AI compiles approved invoices into payment list; clerk reviews, prioritizes, authorizes.		
Answer supplier payment queries by email	20%	AI-assisted
AI drafts replies to routine queries; clerk personalizes and sends complex resolutions.		

WHAT CHANGES

Routine invoice entry and matching will shift to AI, freeing the clerk from data keying. The role will focus on exception handling, supplier relationship queries, and payment governance rather than transaction volume.

FUTURE-STATE ROLE

The Accounts Payable Clerk becomes an AP Analyst, owning invoice exceptions, dispute resolution, and supplier payment performance. They partner with procurement on payment terms and cash-flow forecasting, using automation to handle the routine 80% of volume.

SKILLS TO BUILD

AI output verification and exception logic → Process automation and exception handling

Supplier relationship and query resolution → AI-assisted customer service

Payment controls and audit compliance → Data protection and internal controls

Cash-flow and payment analytics → Finance business partnering

Sales Representative

Sales · 8 people

48

Moderate

HOURS AT STAKE

277 /month

MOST EXPOSED

Entering orders and preparing sales reports

TASK	TIME	AI IMPACT
Visit supermarket and pharmacy accounts to take orders	41%	Human-led
Physical visits, in-person relationship building, observing shelf conditions required.		
Negotiate shelf placement and promotions	29%	AI-assisted
AI analyzes competitor shelving, planograms, promotion data; rep owns final decisions.		
Prepare weekly sales activity reports	18%	Automate
AI pulls sales data, generates report structure; rep reviews and personalizes insights.		
Enter orders into the sales system	12%	Automate
AI captures order details from photos or voice; rep verifies and submits.		

WHAT CHANGES

Order entry and reporting shift from manual keying to AI-drafted outputs the rep validates in minutes. Field time stays on visits and relationships, but reps spend less time at desks on admin.

FUTURE-STATE ROLE

Sales reps become account strategists: using AI to handle data entry and activity logging, they invest time in deeper customer relationships, negotiating better shelf space and promotions, and spotting growth opportunities in account data AI surfaces. The role strengthens around consultative selling and account planning.

SKILLS TO BUILD

Consultative selling and account negotiation → Consultative selling and account management

AI output verification and data handling → Data protection and internal controls

Sales data insight and opportunity spotting → Data analysis and dashboards

Prompt technique for order and report drafting → AI productivity for everyday work

Inventory Clerk

Operations · 4 people

74

High

HOURS AT STAKE

216 /month

MOST EXPOSED

Recording goods and running daily stock reports

TASK

TIME

AI IMPACT

Reconcile cycle counts against system figures

AI flags discrepancies and suggests root causes; clerk investigates and resolves.

35%

AI-assisted

Record goods received into the inventory system

AI can parse delivery docs and pre-fill forms; clerk verifies and confirms entry.

25%

AI-assisted

Run daily stock level reports

Daily reports fully generated by system query; clerk reviews exceptions and exports.

20%

Automate

Email reorder alerts to purchasing

Reorder alerts auto-triggered by thresholds; clerk reviews, approves and sends via template.

20%

Automate

WHAT CHANGES

Routine data entry and report generation will shift to AI, freeing the clerk from daily paper-pushing. The role will focus on investigating exceptions, validating AI outputs, and ensuring inventory accuracy rather than manual recording.

FUTURE-STATE ROLE

The Inventory Clerk will become an inventory analyst, responsible for investigating stock discrepancies, improving cycle-count accuracy, and using data insights to advise purchasing on reorder patterns and slow-moving stock. They will own the quality and integrity of automated processes and escalate anomalies for root-cause action.

SKILLS TO BUILD

Data analysis and exception handling → [Data analysis and dashboards](#)

AI output verification and validation → [Data protection and internal controls](#)

Process automation oversight → [Process automation and exception handling](#)

Problem-solving and investigation → [AI productivity for everyday work](#)

Accounting Clerk

Finance · 3 people

76

High

HOURS AT STAKE

191 /month

MOST EXPOSED

Entering invoices and receipts into software

TASK

TIME

AI IMPACT

Reconcile bank statements monthly

AI flags mismatches and suggests fixes; clerk owns reconciliation decision.

40%

AI-assisted

Enter invoices and receipts into accounting software

OCR and AI invoice capture extract data; clerk verifies and submits.

35%

Automate

Prepare standard financial summaries

AI generates standard reports from GL data; clerk reviews and releases.

25%

Automate

WHAT CHANGES

Routine data entry and report generation shift to AI; the clerk's week refocuses on exception handling, verification and control oversight. Manual invoice keying nearly disappears, replaced by validation of automated captures.

FUTURE-STATE ROLE

The Accounting Clerk becomes a process quality controller and financial analyst, reviewing AI-captured invoices and reconciliation exceptions, analysing variances, and advising on control gaps. They own the accuracy and completeness of the automated pipeline rather than executing it by hand.

SKILLS TO BUILD

Invoice capture and AI output verification → [Process automation and exception handling](#)

Bank reconciliation exception diagnosis → [Process automation and exception handling](#)

Financial data quality and control checks → [Data protection and internal controls](#)

Variance analysis and trend reporting → [Data analysis and dashboards](#)

HR Administrator

Human Resources · 2 people

72

High

HOURS AT STAKE

94 /month

MOST EXPOSED

Updating employee records in HR system

TASK	TIME	AI IMPACT
Schedule interviews and send offer letters		
AI schedules slots, drafts letters; admin confirms, personalises and sends officially.	30%	AI-assisted
Update employee records in the HR system		
AI drafts updates; HR admin reviews, verifies and submits to system.	25%	AI-assisted
Answer staff questions about leave policy		
AI chatbot answers policy questions 24/7; escalates complex cases to admin.	25%	Automate
Prepare payroll change forms		
AI generates form templates and calculations; admin checks accuracy and compliance.	20%	AI-assisted

WHAT CHANGES

Routine data entry and form completion shift to AI drafting, freeing the HR Administrator to focus on policy interpretation, candidate experience and employee relations. The role evolves from transaction processing to quality control and human touchpoints.

FUTURE-STATE ROLE

The HR Administrator becomes a people experience specialist, owning interview quality, offer communication, policy guidance for edge cases and data governance. They configure and monitor AI tools, handle exceptions and invest saved time in employee engagement and process improvement.

SKILLS TO BUILD

- AI output verification and prompt technique → AI productivity for everyday work
- HR data governance and compliance → Data protection and internal controls
- Employee experience and communication → Modern people operations
- Process exception handling → Process automation and exception handling

Marketing Coordinator

Marketing · 2 people

58

Moderate

HOURS AT STAKE

81 /month

MOST EXPOSED

Writing social media posts for brand partners

TASK	TIME	AI IMPACT
Compile monthly campaign performance reports		
AI pulls campaign data, builds charts and summaries; coordinator verifies and contextualizes.	30%	Automate
Write social media posts for brand partners		
AI drafts posts; coordinator refines tone, brand voice, partner approval needed.	25%	AI-assisted
Coordinate in-store promotion schedules		
Requires phone calls, emails, in-store visits and stakeholder negotiation and trust.	25%	Human-led
Design promotional flyers in Canva		
AI suggests layouts and copy in Canva; coordinator owns design choices, brand fit.	20%	AI-assisted

WHAT CHANGES

Social media drafting and report assembly will become faster and data-driven, freeing the coordinator to focus on partner relationships and creative campaign strategy. In-store scheduling will remain hands-on but the coordinator will have more time to manage conflicts and grow those partnerships.

FUTURE-STATE ROLE

The Marketing Coordinator becomes a campaign strategist and partner relationship manager, using AI to handle content drafting and reporting dashboards while owning creative direction, brand alignment and in-store execution. They shift from task-heavy production to higher-value partnership, negotiation and campaign insight work.

SKILLS TO BUILD

- AI content and design prompting → AI for marketing and content
- Campaign data analysis and insight → Data analysis and dashboards
- Brand voice and creative direction → AI for marketing and content
- Partner relationship and stakeholder management → Consultative selling and account management

IT Support Technician

IT · 2 people

52

Moderate

HOURS AT STAKE

56 /month

MOST EXPOSED

Password resets and account unlocks from tickets

TASK	TIME	AI IMPACT
Troubleshoot printer and network issues in person		
In-person diagnostics, physical repairs, hands-on testing and user trust require technician presence.	40%	Human-led
Set up laptops and phones for new staff		
AI checklists and config templates speed setup; technician must physically handle devices, test.	25%	AI-assisted
Document fixes in the help-desk knowledge base		
AI drafts summaries and suggested KB entries from ticket data; technician reviews, edits, approves.	20%	AI-assisted
Reset passwords and unlock accounts from tickets		
AI can generate reset/unlock commands; technician verifies and executes via ticketing system.	15%	Automate

WHAT CHANGES

Routine password resets and basic provisioning shift to automated workflows with AI drafting; technician time reallocates to complex on-site troubleshooting, user enablement and knowledge-base curation. Help-desk backlog shrinks, freeing capacity for proactive maintenance and security hardening.

FUTURE-STATE ROLE

IT Support Technician becomes a hybrid diagnostician and automation owner: handling escalated, complex field issues and managing the exceptions that routine-ticket automation cannot resolve. Increased focus on user enablement, network resilience and security posture rather than volume-driven resets.

SKILLS TO BUILD

- Automation exception handling → IT service automation
- Advanced network and device diagnostics → Advanced technical and diagnostic skills
- AI-assisted documentation and knowledge management → AI productivity for everyday work
- User enablement and technical communication → Leading AI-augmented teams

Customer Service Supervisor

Customer Service · 2 people

58

Moderate

HOURS AT STAKE

55 /month

MOST EXPOSED

Compiling weekly service-level reports

TASK	TIME	AI IMPACT
Listen to call recordings and coach agents		
AI transcribes, flags coaching moments; supervisor listens selectively, coaches.	35%	AI-assisted
Compile weekly service-level reports for the operations manager		
AI pulls data, drafts reports; supervisor validates, contextualizes findings.	25%	AI-assisted
Build and approve shift rosters		
AI suggests schedules around constraints; supervisor approves, handles exceptions.	20%	AI-assisted
Handle escalated customer complaints		
Requires judgment, empathy, accountability; trust-building cannot be delegated to AI.	20%	Human-led

WHAT CHANGES

Routine reporting and scheduling shift to AI-generated drafts; the supervisor spends less time on data entry and more on listening to calls and coaching high-impact moments. Escalated complaints remain entirely human-owned but are informed by better upfront data.

FUTURE-STATE ROLE

The supervisor becomes a coaching and people leader who uses AI dashboards and call highlights to spot coaching opportunities, rather than manually reviewing hours of recordings. They own escalations and team performance improvement, empowered by AI-prepared insights.

SKILLS TO BUILD

- AI-assisted quality coaching → AI-assisted customer service
- Data interpretation and insight spotting → Data analysis and dashboards
- People leadership and team development → Leading AI-augmented teams
- AI output verification and exception ownership → Process automation and exception handling

Operations Manager

Operations · 1 person

62

Moderate

HOURS AT STAKE

39 /month

MOST EXPOSED

Compiling weekly performance reports in Excel

TASK	TIME	AI IMPACT
Coordinate delivery schedules across depots		
AI suggests optimised schedules; manager owns depot constraints, customer commitments, exceptions.	35%	AI-assisted
Compile weekly performance reports for directors		
AI drafts reports from data; manager validates, interprets trends, adds context.	30%	AI-assisted
Prepare PowerPoint decks for monthly reviews		
AI generates slides from reports; manager curates narrative, sets tone, approves messaging.	20%	AI-assisted
Summarise team status updates for management meetings		
AI summarises written updates; manager synthesises for audience, adds decisions.	15%	AI-assisted

WHAT CHANGES

Weekly reporting shifts from manual data gathering to rapid AI-drafted synthesis that the manager refines and validates. Coordination work moves from spreadsheet wrangling to exception-handling and relationship management around AI-suggested schedules.

FUTURE-STATE ROLE

Operations Manager becomes a data interpreter and strategic co-ordinator: reviewing AI-generated plans and reports for feasibility and risk, making accountable decisions on schedule trade-offs, and investing freed time into depot relationships, team development and supply chain resilience planning.

SKILLS TO BUILD

Data analysis and insight → [Data analysis and dashboards](#)

AI output validation and risk judgement → [Data protection and internal controls](#)

Supply chain exception handling → [Process automation and exception handling](#)

Stakeholder communication and influence → [Leading AI-augmented teams](#)

Financial Controller

Finance · 1 person

38

Moderate

HOURS AT STAKE

28 /month

MOST EXPOSED

Reviewing and signing off monthly management accounts

TASK	TIME	AI IMPACT
Review and sign off the monthly management accounts		
AI drafts variance analysis and account reconciliations; controller reviews, judges and signs off.	31%	AI-assisted
Coach the finance team on month-end close		
AI generates process guides and common-error summaries; controller delivers coaching and feedback.	25%	AI-assisted
Present cash-flow forecasts to the board		
AI refreshes forecast models and sensitivities from live data; controller interprets and presents.	25%	AI-assisted
Negotiate credit terms with the bank		
Negotiation requires trust, judgment and accountable decision-making with bank counterparty.	19%	Human-led

WHAT CHANGES

Monthly close will shift from manual data compilation to AI-assisted variance analysis and exception handling, freeing the controller to focus on forecasting, board communication and team development. Routine reconciliations and account reviews will be drafted and flagged by AI, cutting close cycle time and improving audit readiness.

FUTURE-STATE ROLE

The Financial Controller becomes a strategic finance partner who owns cash-flow forecasting, board-level insights and team capability —delegating transaction validation and routine close tasks to AI-augmented workflows. The role strengthens around business advising, stakeholder negotiation and leading the finance function through process automation.

SKILLS TO BUILD

Finance business partnering and forecasting → [Finance business partnering](#)

AI output verification and data controls → [Data protection and internal controls](#)

Leading and coaching AI-augmented teams → [Leading AI-augmented teams](#)

Stakeholder communication and negotiation → [AI productivity for everyday work](#)

HOURS AT STAKE

19 /month

MOST EXPOSED

Designing annual training plan content

TASK	TIME	AI IMPACT
Design the annual training plan		
AI identifies skills gaps from data, drafts curricula, and tracks ROI; manager designs strategy and content.	35%	AI-assisted
Lead disciplinary and grievance hearings		
Disciplinary hearings require in-person presence, trust, and accountable decision-making authority.	25%	Human-led
Advise managers on difficult employee situations		
AI drafts scenario analyses and precedent summaries; manager owns the advice and judgment.	20%	AI-assisted
Negotiate with the union representative		
Union negotiation requires in-person presence, relationship trust, and accountability for binding decisions.	20%	Human-led

WHAT CHANGES

This HR Manager will spend less time on administrative prep (document gathering, compliance checking, training schedule logistics) and more on complex people decisions, coaching managers through difficult situations, and analysing training ROI and workforce trends. Disciplinary and negotiation work remain fundamentally in-person but will be better prepared with AI-generated risk assessments and pr

FUTURE-STATE ROLE

The strengthened HR Manager will shift from operational task management to strategic people partnering: designing interventions based on workforce analytics, coaching managers and leaders through complex employment situations, and building training strategies tied to business outcomes rather than calendar. AI handles compliance documentation, initial case summaries, and training logistics, freeing

- SKILLS TO BUILD
- Workforce analytics and insights

→ Modern people operations
- AI-assisted case preparation and research

→ AI productivity for everyday work
- People leadership and coaching

→ Leading AI-augmented teams
- Employment law and data controls

→ Data protection and internal controls

The skills to build, and where to build them

Grouped by skill theme, largest need first. Providers are checked and current as of this report. Confirm intake dates and costs with each provider.

60 people • 13 roles

AI productivity for everyday work

Using AI assistants to draft, summarise, research and check work safely, including prompt technique, verifying outputs and data-handling rules.

For: Delivery Driver, Forklift Operator, Sales Representative, Inventory Clerk, Warehouse Supervisor, Fleet Mechanic, HVAC Technician, HR Administrator, IT Support Technician, Financial Controller, Director of Business Development, HR Manager, Occupational Health Nurse

Microsoft Learn

Copilot and generative AI fundamentals learning paths

Google Career Certificates

Google AI Essentials

LinkedIn Learning

Generative AI for business professionals

53 people • 7 roles

Consultative selling and account management

Letting AI handle order entry and activity reporting, and building the relationship, negotiation and account-planning skills that stay human.

For: Delivery Driver, Customer Service Representative, Call Centre Agent, Sales Representative, HVAC Technician, Marketing Coordinator, Director of Business Development

HubSpot Academy

Inbound sales; sales enablement (free)

LinkedIn Learning

Consultative selling; key account management

HEART/NSTA Trust

Sales and business administration programmes

47 people • 11 roles

Data protection and internal controls

Handling customer, staff and financial data safely when AI tools are in the loop: privacy rules, approval controls, audit trails and checking AI output.

For: Customer Service Representative, Call Centre Agent, Sales Representative, Accounts Payable Clerk, Inventory Clerk, Accounting Clerk, HR Administrator, Financial Controller, Operations Manager, HR Manager, Occupational Health Nurse

IAPP

Privacy fundamentals and CIPP certification

LinkedIn Learning

Data privacy; internal controls; responsible AI

Coursera

Data privacy fundamentals; AI governance

44 people · 8 roles

Process automation and exception handling

Configuring, checking and improving automated workflows (invoice capture, order processing), and owning the exceptions automation can't handle.

For: Delivery Driver, Call Centre Agent, Accounts Payable Clerk, Inventory Clerk, Accounting Clerk, Customer Service Supervisor, HR Administrator, Operations Manager

Microsoft Learn

Power Automate learning paths

Coursera

Robotic process automation (RPA) specialisations

LinkedIn Learning

Business process automation

39 people · 5 roles

Workplace health and safety

Strengthening the safety-critical, hands-on judgement in the role, and using digital tools for inspections, incident logs and records.

For: Delivery Driver, Forklift Operator, Warehouse Supervisor, Fleet Mechanic, Occupational Health Nurse

NEBOSH

International General Certificate in Occupational Health and Safety

HEART/NSTA Trust

Occupational safety and health programmes

28 people · 4 roles

AI-assisted customer service

Working alongside AI reply-drafting and call-summary tools, and shifting agent time to complex resolution, retention and account care.

For: Customer Service Representative, Call Centre Agent, Accounts Payable Clerk, Customer Service Supervisor

HEART/NSTA Trust

Customer service / customer engagement programmes (NVQ-J)

Coursera

AI in customer service; customer experience management

HubSpot Academy

Customer service and service-hub courses (free)

27 people · 9 roles

Data analysis and dashboards

Moving from keying data in to checking it, analysing it and acting on it: Excel, Power BI, basic statistics and reporting automation.

For: Sales Representative, Inventory Clerk, Accounting Clerk, Warehouse Supervisor, Fleet Mechanic, Customer Service Supervisor, Marketing Coordinator, Operations Manager, Director of Business Development

Microsoft Learn

Power BI Data Analyst learning path (PL-300)

Google Career Certificates

Google Data Analytics Certificate

UWI Open Campus

Continuing education in data and business analytics

21 people · 4 roles

Advanced technical and diagnostic skills

Deepening the hands-on expertise AI can't replace, and adding digital diagnostics, smart equipment and connected-maintenance skills.

For: Forklift Operator, Fleet Mechanic, HVAC Technician, IT Support Technician

HEART/NSTA Trust

Technical and vocational upgrading (NVQ-J Levels 2-4)

Coursera

Industrial IoT; predictive maintenance

UWI Open Campus

Technical continuing education

12 people · 8 roles

Leading AI-augmented teams

Redesigning roles, running AI pilots with staff, coaching through change, and reinvesting time saved on reporting into people and planning.

For: Warehouse Supervisor, Customer Service Supervisor, IT Support Technician, Financial Controller, Operations Manager, Director of Business Development, HR Manager, Occupational Health Nurse

Prosci

Change management certification

LinkedIn Learning

Leading in the age of AI; change leadership

UWI Open Campus

Leadership and management continuing education

5 people · 2 roles

Finance business partnering

Shifting finance roles from transaction processing to variance analysis, forecasting and advising the business.

For: Accounts Payable Clerk, Financial Controller

ACCA

Data analytics and business partnering CPD

Coursera

Financial planning and analysis (FP&A)

UWI Open Campus

Accounting and finance continuing education

3 people · 2 roles

Modern people operations

Automating HR administration and moving HR time to employee experience, workforce planning and people analytics.

For: HR Administrator, HR Manager

CIPD

People analytics and HR technology resources

LinkedIn Learning

People analytics; AI in HR

Coursera

HR analytics

2 people · 1 role

AI for marketing and content

Using AI for content, design and campaign reporting, and putting human time into strategy, brand judgement and partner relationships.

For: Marketing Coordinator

HubSpot Academy

AI for marketers; content marketing (free)

Google Career Certificates

Google Digital Marketing & E-commerce Certificate

Coursera

Generative AI for marketing

2 people · 1 role

IT service automation

Automating routine tickets (resets, provisioning) and moving IT time to security, cloud administration and user enablement.

For: IT Support Technician

Microsoft Learn

Microsoft 365 administrator and Azure fundamentals paths

CompTIA

Security+ and Cloud+ certifications

Google Career Certificates

Google IT Support / Cybersecurity Certificates

A 12-month path from audit to results

0-90 DAYS

Set the rules and prove it works

- Publish an AI-use policy covering approved tools, data handling and human review. Governance scored 20/100.
- Run one pilot in Customer Service: AI support for “Process routine order status requests”. Measure time saved and quality against a baseline.
- Give the 35 staff in High-exposure roles AI productivity training, starting with the pilot team.
- Name an executive sponsor and a working group: HR, IT and one manager from each exposed department.

90-180 DAYS

Redesign roles and build skills

- Scale the pilot to the rest of the department if it hit its targets. Adjust or stop it if it didn't.
- Redesign the most exposed roles around the future-state descriptions in this report, and agree them with staff.
- Launch the reskilling pathways: AI productivity for everyday work; Consultative selling and account management; Data protection and internal controls.
- Start a second pilot in the next department on the exposure-readiness matrix.

180-365 DAYS

Redeploy capacity and re-measure

- Move freed hours into planned priorities such as service quality, collections, account growth and new services. Track where they go.
- Update job descriptions, performance goals and pay bands for the redesigned roles.
- Repeat the readiness survey and re-run this audit to measure progress against the baseline.

How you'll know it's working

Suggested targets. Agree the final numbers at the debrief.

MEASURE	BASELINE (THIS AUDIT)	6 MONTHS	12 MONTHS
Hours redeployed from automated or AI-assisted work	0 hours/month	800 hours/month (25% of the opportunity)	1,921 hours/month
Staff in High-exposure roles who have completed AI training	0 of 35	18 of 35	35 of 35
AI readiness score	38/100	48/100	58/100
Live AI pilots with measured results	0	2	4 or more
Organisation AI Exposure Index (re-audit)	49.4	—	Re-scored; exposure is managed, not necessarily lower

How this audit was produced

Scoring

- Each role was scored 1-99 for AI exposure with the calibrated, task-based engine behind the AiProof Careers diagnostic, anchored to reference occupations.
- Each task was then assessed individually as Automate, AI-assisted or Human-led, with an estimate of its share of the

Hours and value at stake

- Hours at stake = people × weekly hours × 80% (the share of the week the listed tasks are assumed to cover) × task share × AI rate. The AI rate is 60% for Automate tasks, 25% for AI-assisted tasks and 0% for Human-led tasks. Converted to months at 52 ÷ 12 weeks.

working week.

- Organisation and department indices are headcount-weighted averages of the role scores. Bands: High 67+, Moderate 34–66, Lower ≤ 33 .

Limitations

- Results depend on the task descriptions supplied. Roles described in general terms score less precisely.
- AI capability changes quickly. This is a point-in-time view, and we recommend re-auditing every 12 months.
- AI-generated assessments were reviewed by the author, but individual task estimates are indicative rather than time-and-motion measurements.

- The AI rates are planning assumptions, not measurements. Replace them with the time savings measured in your own pilots.
- This report states impact in hours. A money value can be added on request, calculated from your loaded cost per role.
- This is capacity that can be redirected to other work, not a projected headcount reduction.

Data handling

- Role-level data only. No names or personal data were collected.
- Role and task descriptions were processed through Anthropic's API solely to produce this report.
- Source data is deleted within 30 days of delivery, in line with the engagement agreement.

Role-by-role results

ROLE	DEPARTMENT	PEOPLE	SCORE	BAND	HOURS / MO	TASK MIX	MOST EXPOSED WORK
Accounts Payable Clerk	Finance	4	76	High	294		Entering supplier invoices into accounting system
Accounting Clerk	Finance	3	76	High	191		Entering invoices and receipts into software
Call Centre Agent	Customer Service	10	76	High	517		Taking inbound orders and logging call notes
Inventory Clerk	Operations	4	74	High	216		Recording goods and running daily stock reports
Customer Service Representative	Customer Service	12	72	High	772		Answering standard emails using templates
HR Administrator	Human Resources	2	72	High	94		Updating employee records in HR system
Operations Manager	Operations	1	62	Moderate	39		Compiling weekly performance reports in Excel
Customer Service Supervisor	Customer Service	2	58	Moderate	55		Compiling weekly service-level reports
Marketing Coordinator	Marketing	2	58	Moderate	81		Writing social media posts for brand partners
IT Support Technician	IT	2	52	Moderate	56		Password resets and account unlocks from tickets
Sales Representative	Sales	8	48	Moderate	277		Entering orders and preparing sales reports
Financial Controller	Finance	1	38	Moderate	28		Reviewing and signing off monthly management accounts
HR Manager	Human Resources	1	38	Moderate	19		Designing annual training plan content
Warehouse Supervisor	Operations	3	32	Lower	51		Documenting stock discrepancies and safety incidents
Occupational Health Nurse	Health & Safety	1	32	Lower	23		Maintaining confidential health records
Forklift Operator	Operations	14	28	Lower	53		Pre-shift forklift inspection checklists
Delivery Driver	Operations	18	28	Lower	343		Collecting signatures and cash on delivery
Fleet Mechanic	Operations	3	28	Lower	34		Recording maintenance logs for vehicles
HVAC Technician	Facilities	2	28	Lower	28		Quoting small repair jobs
Director of Business Development	Sales	1	28	Lower	29		Quarterly commercial strategy documentation

Want this for your own workforce?

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