A BUSINESS PARABLE

Stop Being the Glue

How to Use AI and Automation to Build a Company That Runs Without You

OSCAR ONEILL

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CHAPTER 1

5:47 AM

Sam's alarm goes off at 5:47 AM. Not because she's a morning person. Because she learned the hard way that if she doesn't get to her inbox before the order desk arrives at 8:30, the day is already on fire before it starts.

She rolls over, grabs her phone, and sees fourteen new emails. Three are from Henderson's, the US grocery chain that accounts for 30% of her revenue. The first one is a purchase order. The second is asking for a tracking number on last week's shipment. The third is a reminder about the tracking number they asked about in the second email.

Sam doesn't have the tracking number. The tracking number is in a spreadsheet that Lisa updates manually after checking the carrier's website. Lisa isn't in yet. Sam opens the carrier website on her phone, tries to log in, gets the password wrong twice, gives up, and makes a note to check it when she gets to the office.

She hasn't had coffee yet. The day is already winning.

* * *

By 9:15 AM, Sam is sitting at her desk with six browser tabs open.

Tab one: QuickBooks Online. Tab two: her email. Tab three: the inventory sheet Ray's crew updates at the end of every shift, so she knows whether there's actually enough Grade A Amber on the warehouse floor before she promises anyone a ship date. Tab four: a Google Sheet that tracks order status, received, entered, shipped, invoiced, because no single system tracks the full pipeline. Tab five: the carrier website. Tab six: a shared Google Drive folder where the order desk saves PDF purchase orders that arrive by email.

This is Sam's operating system. Not software. Sam.

She copies a PO number from an email, switches to the Google Sheet, pastes it in, switches to the inventory sheet, checks the stock, switches back to the sheet, updates the status, switches to QuickBooks, creates a sales order, manually enters the line items, double-checks the exchange rate because Henderson's pays in USD, makes a note to follow up on the CFIA export certificate that customs held up last week, realizes she typed the wrong quantity on line three, deletes it, retypes it, saves it so the packing slip prints out on Ray's dock, and then does it all again for the next order.

Fifty to sixty orders come in every week. Sam touches most of them herself. Henderson's pricing is the one thing she can't afford to get wrong.

The order desk, which mostly means Lisa, touches all of them. Between the two of them, Sam and Lisa spend more than fifty hours a week copying numbers from one screen and typing them into another. Not analyzing. Not selling. Just moving data that already exists in one system into another system that refuses to talk to the first one.

Sam Laurent didn't found Maple Syrup Co. The Pelletier family did, in 1978, as a Quebec packing and distribution operation. In the nineties they moved packing and shipping to a warehouse in Woodstock,

Ontario, right on the 401, closer to the Toronto restaurants and the US border crossings that had become most of the business. The syrup still comes from partner producers in Quebec, by the barrel. Everything else happens in Woodstock.

Twelve years ago, the Pelletiers sold MapleCo to Sam. A bigger packer offered them more. Sam offered less, and a promise to keep the Woodstock crew. Ray was part of that crew. The Pelletiers took Sam's offer.

MapleCo has grown a lot since. Today it has about 30 employees and does roughly $15 million a year selling branded, private-label, and foodservice maple products across Canada and the US.

But the systems never grew with it.

When MapleCo was twenty customers and fifty orders a month, a spreadsheet and someone's memory were enough. Now it's two hundred customers, about two hundred and fifty orders a month, and three different product lines including seasonal gift baskets that make November and December a logistical nightmare. The same approach that worked at $4 million is now held together with duct tape and institutional knowledge at $15 million.

Sam is pretty sure her inbox breeds at night.

* * *

Here's the thing about Lisa.

Lisa has been with MapleCo for eight years. She was originally hired for the order desk. She knows the business better than anyone, which suppliers are consistently late, which customers always dispute invoices, which products have tight margins that can't absorb ship-

ping cost increases. She knows that Mrs. Chen at Golden Dragon Restaurant Supply writes “Dark” on every purchase order but wants Grade A Amber, because years ago Mrs. Chen told her on the phone that “dark” just means “the good one,” and Lisa has quietly been changing it ever since. She knows that Henderson’s procurement system sends purchase orders as PDFs but their remittance advices come as CSV files attached to emails with no subject line.

Lisa is brilliant. She could be running operations strategy, analyzing margins, building supplier relationships, negotiating better rates.

Instead, she spends 80% of her day retyping numbers. Purchase orders into QuickBooks. QuickBooks into the tracker. The tracker into invoices. Line by line. Field by field. Every single order.

She once described her role to a friend at a party and the friend said, “So you’re like a very expensive USB cable between two computers that won’t talk to each other.” Lisa laughed. Then she stopped laughing.

* * *

And then there’s Ray.

Ray Beaulieu has managed MapleCo’s warehouse and logistics for fifteen years. He was there before Sam. He’ll probably be there after the building itself crumbles. Ray does not care about software, dashboards, or whatever “the cloud” is. Ray cares about whether pallets are stacked correctly, whether the Grade A Amber is separated from the Grade A Dark (because if you mix them, someone eventually ships the wrong one and then everyone has a bad week), and whether the truck shows up on time.

Ray's view of the office is simple: they send him paperwork, some of it is correct, and he ships things. When the paperwork is wrong, he calls Sam. When Sam doesn't answer, he calls Lisa. When Lisa doesn't answer, he makes his best guess and hopes nobody notices.

Ray has seen three different "new systems" come and go in his fifteen years. The fax machine is still the most reliable technology in his building, and he will defend this position with the calm certainty of a man who has never once had a fax machine crash, reboot, or ask him to update its software.

Ray is not opposed to change. He is opposed to nonsense.

* * *

Marcus handles the buyers.

He's been MapleCo's account rep for three years: restaurant groups, specialty grocers, the regional chains that aren't Henderson's. He's thirty-one, relentlessly upbeat, and always hunting for an edge. Most of his messages to Sam start with "Quick one." None of them are quick. They're all some version of *what did this customer order last spring, and at what price?* The answer lives in three places, so Sam stops whatever she's doing to look it up.

Henderson's is the one account Marcus doesn't touch. Sam handles Henderson's herself. Marcus has asked twice to take it on. Both times, she's said she'll think about it.

* * *

Here's what Sam's week looks like.

Monday: weekend purchase orders, Friday's tracking numbers, last week's payments.

Tuesday: barrel orders for the producers in Quebec. Sam reads the counts off Ray's inventory sheet and retypes them into each producer's web portal, before noon or the barrels don't ship until next week.

Wednesday: invoices, created one at a time in QuickBooks and emailed one at a time. Every so often one goes out at last month's price, because the update never made it from the Google Sheet to QuickBooks.

Thursday: whatever's on fire.

Friday: Lisa starts payment matching. Every deposit in the bank account has to be matched to the open invoices it pays in QuickBooks, and the biggest customers pay several invoices with one wire and a cryptic reference number. It takes two full days. Lisa has a colour-coded system in the spreadsheet that only she understands. Sam once asked her to explain it, and Lisa said, "Just don't touch columns M through Q."

Sam works sixty hours a week. Lisa works close to fifty. They're running a $15 million business on systems built for a $4 million one.

* * *

One Thursday, the fire is on the dock.

Ray is at the shipping desk with the inventory sheet and two orders. "Amber," he says. "Sixty-five cases on the floor. These two want ninety."

A grocery co-op in Guelph wants forty cases of Grade A Amber tomorrow. A bakery chain in Brantford wants fifty, also tomorrow.

Sam reads both POs properly. The co-op's has a line at the bottom: *Flyer week starts Monday*. The flyer is already printed, so that date doesn't move. The bakery's is a standing order, and Sam knows the bakery. They don't sell the syrup. They bake with it, and they make their maple glaze on Wednesdays.

"When do the barrels from Quebec land?" she asks.

"Monday. I can pack the rest Tuesday."

Sam calls Denise, the bakery's buyer. "I can get you twenty-five cases tomorrow and twenty-five Tuesday. Tomorrow's covers your Wednesday glaze. The second truck's on us."

A pause while Denise checks. "Twenty-five covers Wednesday," she says. "You know our kitchen better than our new purchasing guy does. Fine."

Sam tells Ray: forty to Guelph, twenty-five to Brantford, the rest Tuesday. Ray writes it on his whiteboard.

Back at her desk, she asks Lisa to split the Brantford order and record the second shipment. Lisa has questions. Does the Tuesday half get its own invoice? Who books the second pickup? Does the bakery's volume discount apply to both halves? Sam answers all three.

Then Marcus is in the doorway. "Quick one."

Sam writes *Brantford, Tuesday* on a sticky note and presses it to the edge of her monitor, next to four others.

* * *

Sam can't remember the last time she took a real vacation.

She tried once, two years ago. A week in BC with her family. On day two, Lisa called because Henderson's sent a rush order and Lisa wasn't sure about the pricing for the new bulk line. Sam spent forty-five minutes on the phone from a campground in Tofino walking Lisa through a spreadsheet she could barely see on her phone screen. On day three, a payment came in that didn't match any open invoice, and only Sam knew that it was an advance deposit for a custom gift basket order that she'd agreed to verbally and never entered into the system.

By day four she was answering emails from the cabin. By day five she gave up pretending and just worked from her laptop at the kitchen table while her daughter, Maya, watched TV.

* * *

One Tuesday in October, Sam stays late.

Not because she has to, although she does, but because she got an email at 4 PM from Mrs. Chen at Golden Dragon. A shipment arrived with the wrong grade. Again. Grade A Dark instead of Grade A Amber. Mrs. Chen is polite about it, because Mrs. Chen is always polite, but there's a line in the email that lands like a punch: "This is the third time this year. We love your product, Sam, but we need to be able to count on the order being right."

Sam could delegate this. She could forward it to the order desk and deal with it tomorrow. Instead, she walks out to the warehouse at 6 PM, pulls the right case herself, and arranges a same-day courier to Mrs. Chen's warehouse in Markham. She pays for the courier out of her own pocket. She writes a personal apology note and tucks it into the box.

Ray is still on the dock when she gets there. He watches her pull the case and says nothing for a while. Then: “Golden Dragon’s slips say Amber most weeks. Some weeks they say Dark.”

“Ray. Not tonight.”

“I flagged it both times before. Sent emails.”

Neither of them says anything after that. Sam loads the courier van and drives home.

On the drive, she goes back over it. The wrong-grade error wasn’t a mystery. She traced it in five minutes, and the answer was worse than a typo.

The PO said Dark. Mrs. Chen’s POs always say Dark. Lisa was buried in month-end payment matching the day it came in, so Sam entered the Golden Dragon order herself, exactly as written. Nobody ever told her that Lisa changes every Golden Dragon order to Amber. Nobody ever told anyone. The two times before, Lisa had been out sick, and whoever covered for her did exactly what Sam did. They typed what the paper said.

The error cost Sam a courier fee, a credit note, an hour of her evening, and a small chip off the trust she’s built with her best restaurant customer. And it was caused by a business where the most important rule about one of its best customers lived in one person’s head, and the person typing that afternoon wasn’t that person.

Sam pulls into her driveway at 8:30 PM. Maya’s hockey practice ended an hour ago. Her husband, Ben, handled it.

She sits in the car for a minute, engine off, and thinks: *There has to be a better way to do this.*

* * *

At their quarterly review, Sam's accountant, a methodical man named Gerald who has never once been excited about anything in the twenty years Sam has known him, says something that Sam almost doesn't hear.

They're going over the numbers. Revenue is up 18%. Margins are steady. Cash flow is "manageable," which is Gerald-speak for "not great." He points out that accounts receivable days have crept up: invoices are going out slower, which means payments are coming in slower. He points out that the shipping error rate has doubled since last year.

Sam knows all of this. She lives it.

Then Gerald puts down his pen, takes off his glasses, and says:

"Sam, you didn't build this business to be its best employee. You built it to be its owner."

Sam's pen stops moving.

"Your revenue is up, but your margin per hour of *your* time is going down. You're working more hours for less return. That's a process problem."

Something snags. She writes it down in her notebook, and they move on to tax planning.

* * *

That night, Sam can't sleep.

She lies in bed and runs the numbers in her head. She works sixty hours a week. If she paid herself what she pays Lisa, $55,000 a year, her hourly rate would be about $18. She doesn't pay herself $55,000.

She pays herself more. But the math doesn't care about her salary. The math cares about what she's doing with her time.

She spends at least 15 hours a week on data entry. Another 10 on chasing tracking numbers, matching payments, and fixing errors. That's 25 hours a week, almost half her time, on work that doesn't require her expertise, her relationships, or her judgment. Work that a well-designed system should be doing automatically.

Sam picks up her phone. It's 11:47 PM. She types into Google: "how to automate my business."

She gets two million results and none of them feel real. Lots of promises about "digital transformation" and "AI-powered solutions" and "unlock your business potential." Her eyes glaze over.

She opens ChatGPT. Types: "I run a distribution business and I'm spending too many hours on manual data entry. How do I automate this?"

She gets a decent answer. Generic, but decent. Use Zapier. Try QuickBooks integrations. Consider RPA software. Explore AI tools.

She screenshots it. Closes her phone. Goes to sleep.

She doesn't do anything about it for three weeks, because she's too busy doing the manual work that needs automating.

CHAPTER 2

The Wrong Question

Two weeks after her midnight Google search, something lands in Sam's inbox that makes the whole thing worse.

It's a PDF from Henderson's. Not a purchase order. A vendor scorecard. Henderson's does these quarterly, rating every supplier on three metrics: order accuracy, delivery timeliness, and invoice consistency. Sam has received these before. She usually skims them.

This time, she reads every line.

MapleCo's order accuracy: 91%. The threshold is 95%. Below threshold.

Delivery timeliness: 87%. The threshold is 92%. Below threshold.

Invoice consistency: 94%. Threshold is 95%. Below threshold, but barely.

At the bottom, in a box that Sam has never seen populated before, there's a note: "Suppliers scoring below threshold on two or more metrics for two consecutive quarters will be placed on Vendor Performance Review. Please contact your account representative to discuss a remediation plan."

Sam stares at the screen. She's below threshold on all three metrics. Henderson's hasn't said anything yet. They haven't called. They've

sent a document. And data, Sam is learning, is how large companies say “we’re watching” without raising their voice.

She puts the scorecard in a drawer. She doesn’t show it to Lisa. She doesn’t show it to anyone.

She will think about this later. Right now, she has nineteen purchase orders in the shared inbox and no time to think about anything.

She doesn’t get to think about it later. Ten days after the scorecard lands, her phone rings. Greg Hollis, Henderson’s procurement manager. Five years of purchase orders, and she has heard his voice maybe four times.

“Sam. I sent you the scorecard on the third. The box at the bottom asks you to call me.”

“I know. I’ve been meaning to.”

“Here’s where we are.” He doesn’t sound angry. He sounds like a man reading the weather. “Two quarters under threshold and corporate puts you on Vendor Performance Review. Review means we re-bid your shelf space, and somebody cheaper is always waiting. Q4 is going to be ugly for everyone, so I asked them to look at the trend instead. They gave me until the end of June. If your numbers haven’t moved by then, it’s out of my hands.”

“They’ll move.”

“I hope so. I like your syrup.” He hangs up.

The next morning, Sam does what every overwhelmed business owner does.

She hires someone.

His name is Jordan. He's 26, sharp, and eager, fresh from a tech startup that folded three weeks before his rent was due. He took the MapleCo job because he needed to eat, not because he dreamed of maple syrup distribution. A recruiter in London finds him in nine days, for a fee Sam tries not to think about. He starts at $48,000 a year. Sam's logic is simple: Lisa is drowning, so add another pair of hands.

For the first two weeks, it feels like the right call. Jordan picks things up fast. He starts processing POs alongside Lisa. The backlog shrinks. Sam feels a flicker of relief.

By week six, the flicker is gone.

Sam has added a second person to a broken process. Jordan does the same manual data entry that Lisa does, copying PO data from PDFs into QuickBooks, updating the spreadsheet, emailing tracking numbers. He's faster than Lisa at typing but slower at judgment calls, because he doesn't know which customers are fussy about grades and which suppliers need a follow-up call on Wednesdays.

The bottleneck didn't disappear. It got a second chair.

Sam is paying $48,000 a year, plus CPP, EI, benefits, equipment, and the hours Lisa spends training Jordan instead of entering orders. All-in, Jordan is costing the business about $65,000 a year. The error rate hasn't dropped. Neither have Sam's hours. Henderson's is still shaky.

Sam thinks she just needs to give Jordan more time.

At the end of week six, on a Friday afternoon in early January, Jordan knocks on Sam's door frame.

He's polite about it. He's taken a job at a software company in Kitchener. They want him Monday.

"I'm sorry," he says. "I can't spend forty hours a week copying numbers from one tab into another."

At least he stayed through the gift baskets.

Sam tells Lisa before she goes home. Lisa takes it quietly. "Six weeks," she says, and goes back to her screen. She doesn't say the rest. She's been copying numbers from one tab into another for eight years.

The math is simple, and Sam hates it. The recruiter's fee. Six weeks of wages. The hours Lisa spent training him instead of entering orders. About $15,000 gone, and Lisa is back to doing it alone.

* * *

Two weeks later, in the middle of January, with Lisa underwater and Henderson's clock running, Sam makes her second mistake.

She books a demo. A software company called CloudSyncPro has sent her a polished email about their "AI-powered supply chain platform." Sam reserves the boardroom, puts the Zoom call on the big screen, and brings Lisa and Ray in to watch.

The salesperson is about twenty-four and wearing a quarter-zip vest. He says "seamless" eleven times in forty minutes. He clicks through animated dashboards showing real-time supply chain velocity, a phrase nobody in the room can define.

"It connects your ordering, inventory, shipping, and invoicing into one unified ecosystem," he says, beaming. "Any questions?"

Lisa has one. "Our biggest customer sends purchase orders as PDFs with a cover sheet on page one that has to be ignored. Then they pay

four invoices at a time with one USD wire. How does it match those in QuickBooks Online?"

The rep doesn't stop smiling. "Great question. Our AI layer ingests omnichannel inputs seamlessly."

"Right," Lisa says. "Does it skip the cover sheet?"

"Our onboarding engineers can scope a custom connector for that."

Ray leans forward from the far end of the table. "Restaurant in Niagara faxes us a PO on carbon paper. What does your ecosystem do with that?"

The rep laughs like Ray is making a joke. Ray is not making a joke.

Ray stands up, picks up his coffee mug, and gives his assessment in six words. "So it's another thing that doesn't."

Then he goes back to the dock. He is not invited to the next software review meeting.

Sam signs anyway. She wants something purpose-built, and the dashboards were very nice. CloudSyncPro costs $2,500 a month: $30,000 a year, billed annually, up front.

By the end of January, the platform is shelfware.

CloudSyncPro was built for companies doing $200 million to $500 million in revenue with 200-person operations teams. It has features Sam will never use and is missing features she desperately needs. It doesn't understand maple syrup grading. It doesn't skip Henderson's cover sheet. It only connects natively to QuickBooks Enterprise, a different product from the QuickBooks Online that MapleCo runs on. And the "custom connector" turns out to be a $15,000 setup fee that wasn't in the original quote.

Ray, as it turned out, was completely correct.

* * *

Sam's third mistake is the one that almost breaks something for real.

In the last week of January, with Jordan gone and CloudSyncPro gathering dust, she calls Dave.

Dave runs the three-person IT company in Ingersoll that has looked after MapleCo for nine years. Laptops, Microsoft 365, the firewall, the backups, the warehouse printers Ray swears at. When the Wi-Fi drops, Dave fixes it. When someone clicks a link they shouldn't, Dave cleans it up. As far as MapleCo is concerned, Dave is the technology department.

"Can your team build us something with AI?" Sam asks. "For the purchase orders."

"Sam, we're an MSP. We keep the Wi-Fi up, the laptops patched, and the ransomware out. Custom AI isn't our trade."

"I'm not asking for custom AI. Customers keep calling to ask if we got their PO. I just want them to get a confirmation so they stop calling. Something small."

Something small is how most bad weekends start. Dave knows this. He also likes Sam, and MapleCo has paid every invoice on time for nine years.

"Fine," he says. "I'll wire up a quick Zapier thing with ChatGPT. As a favour."

On Monday he shows her on his laptop. "When a PO comes into the shared inbox, Zapier picks up the email, sends the PDF to ChatGPT to pull out the order details, and sends the customer a confirmation.

Then it books the pickup with the carrier, so Ray doesn't have to phone it in. If any step fails, it sends the email back into the inbox and starts over. I tested it with ten emails. It works."

Sam is impressed. It took him one weekend. CloudSyncPro took her $30,000.

"Ship it," she says.

Dave hesitates. "It's a favour, Sam. Nobody's watching it."

"It's a confirmation email. What's it going to do?"

Dave turns it on.

For three weeks, it works beautifully. Customers send POs by email, and within minutes they get a professional confirmation: "Thank you for your order. We've received your purchase order #4721 for 24 cases of Grade A Amber and 12 cases of Grade A Dark."

Sam is thrilled. She tells Lisa this is the future. Lisa nods politely but says nothing. Lisa has seen "the future" before. It usually has a shelf life of about a month.

Marcus is even more thrilled. He watched Dave's demo over Sam's shoulder, and by Wednesday he's doing the same trick by hand in his own ChatGPT account: pasting in a customer's POs to see what they ordered, drafting replies to buyers, asking it who's due for a reorder call. He shows Sam a summary it wrote of Golden Dragon's last six months. It's good. She tells him so.

On a Sunday night in February, at 2:14 AM, the carrier's API goes down for maintenance. The pickup step fails. Dave's shortcut does exactly what he built it to do: it sends the email back into the inbox, and the zap starts again from the top. It reads the PO, extracts it, and sends the confirmation. Then the pickup step fails again. Nothing in

the zap records that the customer already has a confirmation. For every PO that comes in overnight, the same email goes out again. And again. And again.

On Monday, Sam's alarm goes off at 5:47, and she lies in bed and watches her inbox fill.

Got your confirmation. And again. And again?

Is this a phishing thing?

Please confirm we are NOT receiving eight pallets. Our dock takes two.

Fourteen customers, each with between three and eight identical confirmations. Some of them reply to every copy. By seven, Greg Hollis, the man who gave her until the end of June, has forwarded his six copies to his VP and copied Sam. His note is one line: *FYI. MapleCo.*

At 8:40, Ray is in her doorway holding a printout. The customer whose dock takes two has forwarded all eight confirmations to the shipping desk.

"Twenty-four cases of Amber," Ray says, and fans the pages. "Eight times. Which one am I shipping?"

Dave is in Sam's office before nine. He shuts the zap off, then scrolls through its history for a long minute without saying anything.

"I built you a favour," he says finally, "not a system. What you're after needs proper error handling, retries that don't start over from the top, monitoring around the clock, and somebody who answers when it alerts. That's not what we do, Sam. If you find someone who builds this stuff properly, I'll hand it over happily."

That same morning, while Sam fields the angry phone calls, Lisa finds something else. She goes to Marcus's desk for a customer's phone

number, and his personal ChatGPT account is open on the screen. The sidebar is a list of customer names. For three weeks, he's been pasting actual purchase orders into it, complete with company names, contact information, order quantities, and pricing. Lisa takes a photo of the screen with her phone.

Lisa mentions it quietly to Sam. "We don't really have a process for this," she says. "We don't have a process for any of this. We have a habit, and the habit doesn't include a section on what Marcus is allowed to paste into the internet."

* * *

The next morning, Sam sits in her office with the door closed.

She doesn't add up the damage. She can't face the number yet. Instead, she writes apology emails. One per customer, fourteen of them, each one personal, because a form apology to someone who just got eight form emails would be its own kind of insult.

Somewhere around number nine, Marcus knocks and asks if she has a minute.

"No," Sam says, in a voice she doesn't recognize.

He backs out of the doorway. She feels bad about it for the rest of the day. The ChatGPT conversation she owes him slides to tomorrow, and then to next week.

The money will hurt. The trust hurts more. Henderson's is quieter than usual. Mrs. Chen hasn't placed an order this month.

* * *

That Friday, Sam calls Gerald. Not for accounting advice. Just to vent.

Gerald, being Gerald, listens patiently and then says: “Have you called that automation fellow I mentioned?”

Sam sighs. “Gerald, I just spent $30K on software that doesn’t work and had a robot email-bomb my customers at 2 AM. I’m not exactly in the market for more technology.”

“He’s not technology,” Gerald says. “He’s a person. A weird one. But the good kind of weird. He fixed my dental client’s invoicing problem in three weeks, and that practice had been a mess for years.”

Gerald sends Sam a link. She doesn’t open it. She has a stack of credit notes to approve and a family to feed.

At 7 PM, she’s at the kitchen counter with her laptop open beside a pot of pasta she has forgotten to stir. Ben is setting the table around her paperwork. Maya comes in and drops her goalie bag by the door. The bag is roughly the size of Maya.

Sam remembers the last game she actually saw, back in November: a penalty shot, Maya flat on the ice with the puck under her glove, then looking up into the stands to find her. Sam opens her mouth to ask about tomorrow. The laptop chimes. Another credit note.

“Dad’s driving me to the scrimmage tomorrow,” Maya says. She’s eleven. She doesn’t look up from her phone. “You don’t have to pretend you’re going to make it, Mom.”

“I’m not pretending. I’m going to try.”

Maya looks at the laptop, then at her mother. “Okay,” she says, and goes upstairs.

“Ten o’clock, rink two,” Ben says. “I’ll save you a seat.”

The pasta boils over. Sam doesn’t move to stop it. Ben does.

At 11 PM, after Ben and Maya are asleep, she opens Gerald's link. It's a blog post by someone named Oscar ONeill, called "Automation vs Hiring: The Real Math for Growing Canadian Businesses."

The first line reads: *You're working 60-hour weeks and your business is growing. Your instinct says hire someone.*

Sam reads the whole thing twice. Salary is just the start, it says. Add CPP and EI, benefits, equipment, and the months it takes before a new hire is actually productive. She doesn't need to do the multiplication. The recruiter's invoice is in the same drawer as Henderson's scorecard.

One line stops her: *These are tasks where a human is essentially acting as a slow, error-prone computer.*

She thinks about Jordan in her doorway on a Friday afternoon. She thinks about Lisa, who has been doing a computer's job for years without once complaining about it.

It doesn't read like a pitch. It reads like someone has a camera in her office.

There's a contact form at the bottom. She fills it out. A chat window pops up. A chatbot named Winston asks if he can help.

"I'm a maple syrup company," she types, feeling ridiculous. "And I think my business is falling apart."

Winston's reply is immediate: "You're not the first person to tell me that at 11 PM on a Friday. That's usually when business owners finally have time to think. Can I ask what's eating up most of your time right now?"

Sam looks at the question for a while.

Then she types for ten minutes straight.

* * *

Monday morning. Sam's phone rings. The caller ID says London, Ontario.

"Sam? It's Oscar. From DigitalStaff. I read what you sent Winston on Friday night."

Sam braces for the pitch.

Oscar says: "Tell me about the last invoice that made you want to throw your computer out the window."

It's such a specific question that Sam answers it before she can decide not to. And then she keeps going. For forty-five minutes, she talks. About Lisa, about Jordan walking out, about Dave's zap, about the six browser tabs, about Henderson's, about the POs that arrive as PDFs and the tracking numbers she can't find and the payment matching that only Lisa understands and the month-end that eats her weekends.

Oscar doesn't interrupt. He asks sharp questions: "How many POs per week?" "What format do Henderson's send?" "When you say Lisa enters them, you mean line by line into QuickBooks?" But mostly he just listens.

At the end, Sam waits for the pitch.

Instead, Oscar says: "You don't have a technology problem, Sam."

"I'm sorry?"

"You have a process problem that technology can solve. But only if we understand the process first."

"So what do you start with?"

“I start with the dumbest possible question: *What are you actually doing, step by step, right now?* Not what you think you’re doing. Not what you wish you were doing. What actually happens when a purchase order hits your inbox at 9 AM on a Tuesday?”

“I told you. Lisa opens the email…”

“No. Slower. What email client? Where’s the inbox? Is it shared? Who sees it first? Does the subject line tell you anything? Is the PO always a PDF? Is it always an attachment, or sometimes inline? Does it always have the same fields?”

Sam has never thought about her business at this level of detail. It’s like someone asking her to describe how she breathes.

* * *

Sam hangs up and looks at her laptop. Six browser tabs, still open from this morning.

She has done this process thousands of times. She has never once described it. Not to the CloudSyncPro salesperson, who wanted to talk about features. Not to Dave, who built exactly what she asked for. Not even to herself.

She picks up her phone and books a meeting at Oscar’s office in London for the first week of March.

CHAPTER 3

The Map

Oscar's office is not what Sam expected.

She expected glass and chrome. A big screen with dashboards. Maybe a robot in the corner. Instead, it's a modest space in London, Ontario, with a whiteboard that takes up an entire wall, a desk buried in coffee cups, and an eraser worn down almost to the plastic.

Oscar gestures to the whiteboard. "I want to try something. You told me on the phone that you tried three things: hiring, buying software, and having your IT guy rig up Zapier and ChatGPT. All three failed. But they didn't fail for the same reason. And I think you already know why, even if you haven't put words to it yet."

He writes three problems on the whiteboard:

Problem 1: When a shipping label is created, someone needs to email the tracking number to the customer.

Problem 2: Every Tuesday, someone reads the counts off Ray's inventory sheet and types the barrel order into each Quebec producer's web portal. Same screens, same clicks, every single time.

Problem 3: A PDF purchase order arrives and someone needs to read it, understand what it's asking for, and extract the line items, even though every customer's PO looks different.

“Three problems,” Oscar says. “If you had to solve each one, what would you reach for?”

Sam thinks. “I mean… Zapier for the first one? It’s just a trigger. When this happens, do that.”

“Good. What about the second?”

“Some kind of… I don’t know, a macro? Something that clicks through the screens the same way every time?”

“Close enough. And the third?”

Sam pauses. “That’s the one where you’d need AI. Because the document is different every time.”

“You just described the whole landscape in about thirty seconds,” Oscar says. “Most vendors take forty minutes to sell you a platform that blurs all three together.”

He labels them on the board:

Problem 1: Automation. Rules. If this, then that. Simple, cheap, usually the right starting point.

Problem 2: RPA. Automation through the screen. A software robot that mimics what a human clicks, in the same order, every time. More complex, but still predictable.

Problem 3: AI. Judgment. Reading, interpreting, deciding, even when the input changes.

“Which of these did CloudSyncPro promise to solve?”

“All of them. They said it would handle everything.”

“And Dave’s zap?”

“The third one. The AI one.” Sam stops. “So the AI was the…” She doesn’t finish. She isn’t sure it was.

“Do you still have access to it?” Oscar asks.

She does. She opens her laptop and pulls up the zap’s history, and Oscar scrolls to the Sunday night. Each run is a list of steps. On the first run, the ChatGPT step reads *PO #4721: 24 cases Grade A Amber, 12 cases Grade A Dark.* Correct. Confirmation: sent. Then, at 2:14 AM, the carrier step turns red, and Dave’s error path sends the email back into the inbox.

The next run starts from the top. Same PO. Same correct reading. Confirmation: sent. Carrier: red. Eight runs for one purchase order, then eight more for the next one.

Sam scrolls through the ChatGPT steps. Quantities right. Grades right. PO numbers right. Every time.

“It read them all correctly,” she says. “Nothing checked whether the customer already had a confirmation. Nothing told it to stop when the carrier went down.” She sits back. “Nobody was watching.”

“Zapier can run a solid workflow if somebody designs it to,” Oscar says. “ChatGPT can read a PO. What nobody built was the part in between.” He looks at the screen a moment longer. “I’ve built one of those myself. Years ago, a bot for an online game. It fought scorpions all night while I slept. Fight, heal, cook, fight. One night a moderator walked up and tried to talk to it, and it kept fighting scorpions. Nobody had told it about moderators, and I was asleep.”

“What happened?”

“I got banned.”

Sam looks at the board. Then she says something that surprises both of them.

“It’s like the sugar shack. The tubing is automation. It just flows. The person connecting the buckets to the evaporator is RPA, doing the same physical steps every time. And the grader, the one who tastes the syrup and decides what grade it is, that’s AI.”

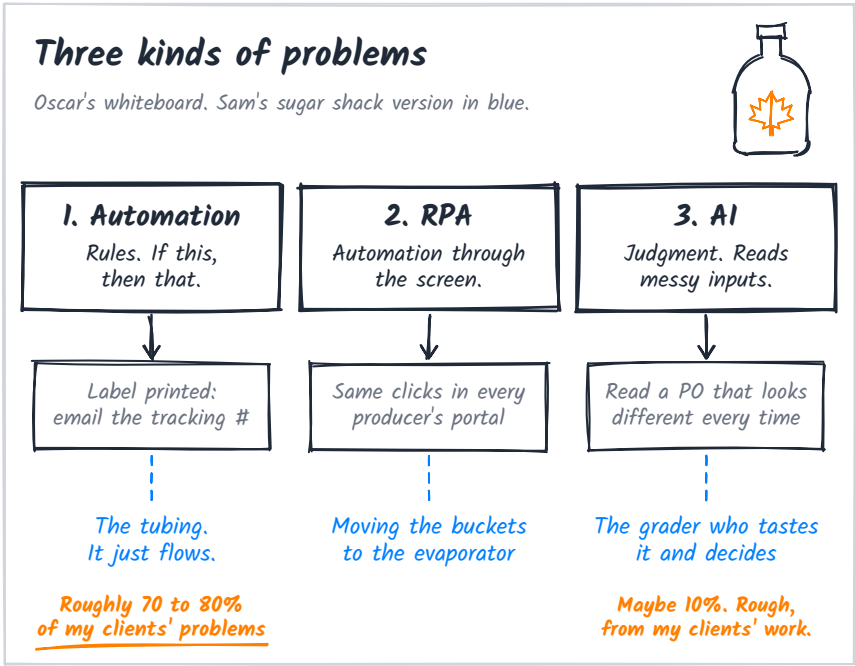
Oscar picks up the marker and draws a maple syrup bottle next to the three problems. “Keep going.”

“So CloudSyncPro tried to do all three at once, without understanding which parts we actually needed.”

“And Dave’s zap?”

“A good grader,” Sam says, “on the end of tubing with no shut-off valve.”

Oscar caps the marker. “Across my clients, roughly 70 to 80 percent of the pain points turn out to be Problem 1. Rules and triggers. AI is the right answer maybe 10 percent of the time. Real systems mix all three. Where a system has a supported API or a native integration, you use that. Screen automation is for the systems that don’t. The trick is matching the tool to the problem, not buying the biggest tool and hoping it fits everything.”



“So most of my problems are the cheap end?”

“For most of your problems, yeah. Matching payments to invoices at month-end? That’s mostly rule-following, with judgment on the messy ones. Medium complexity. Your PO data extraction? That’s AI territory, because every customer sends a different format. But your tracking number emails? That’s a simple trigger: when a shipping label is created, email the tracking number to the customer. Hours of work, not weeks.”

“I’ve been paying Lisa to do that manually for years.”

“I know.”

* * *

Oscar pours two coffees from a machine in the corner and hands Sam one.

“What Dave built is an AI assistant with a trigger bolted on,” he says. “An assistant is what you have when you open ChatGPT and type a question. You ask, it answers, and then a person decides what to do with the answer. You’re still the one copying, pasting, deciding, and acting. You’re still the bottleneck.”

He sets his cup down. “An AI system is different. It reads the incoming purchase orders, extracts the line items, checks them against your customers and your prices, releases the order to the warehouse, and confirms with the customer. When the order ships, the invoice goes into QuickBooks. And around all of that, it has the boring parts the zap didn’t: error handling, monitoring, a log, and a person who sees the exceptions.”

Sam has used ChatGPT to draft emails and summarize reports. It helped, and the next day she did the same work again.

“I talked Dave into this,” she says. “He told me it wasn’t his trade.”

“He was right, and he told you before he built it. That’s a good IT guy. Keep him.”

“You say that like you’ve been one.”

“I was one. I started fixing computers at sixteen. Neighbourhood Nerd.”

Sam puts her coffee down. “Neighbourhood Nerd.”

“Nobody was ever confused about what they were getting.”

“Did the nerd have a van?”

“The nerd had a bicycle.” He says it like it was a perfectly good fleet. “It grew into YourTech. Small businesses, their computers and their networks. Dave’s job, more or less. Spend enough time under people’s desks and you start noticing what they do at them. The same numbers typed into three screens, all day. But asking your MSP to engineer an AI workflow is like asking your electrician to design the evaporator. Same building. Different trade.”

* * *

Sam hesitates, then opens the photos on her phone. “Lisa found this after the email thing. It’s Marcus’s ChatGPT. He’s our account rep.”

Oscar reads for a minute. Customer names. PO numbers. Line items with per-case pricing. He doesn’t make a joke this time.

“This matters more than the zap,” he says. “Everything pasted into a personal ChatGPT account goes to OpenAI under consumer terms. Unless he’s switched off a setting called ‘Improve the model for everyone,’ they can use it to train their models. Some of this looks like Henderson’s pricing. Is that under NDA?”

“…Probably.”

“Then tell Marcus today. No customer data in ChatGPT until we’ve written a policy. It’s one page. We’ll do it together.”

“I’ll tell him.”

“AI is good at reading messy documents, sorting things, and summarizing,” Oscar says. “It’s bad at being right every time, and it’s terrible at keeping secrets. And it can’t know what nobody told it. It doesn’t know that Mrs. Chen wants Amber even though she writes Dark. That

lives in Lisa's head. If you don't teach it to the system, the system won't know."

The Golden Dragon order comes back to her. She typed what the paper said, too.

"So it's not a replacement for Lisa."

"It's not a replacement for anyone. It's a replacement for the boring parts of everyone's job. The reading, the copying, the sorting. The judgment and the relationships stay human."

Sam's phone buzzes. She glances at it. It's Lisa. She almost ignores it, but Lisa doesn't call during business hours unless something is on fire.

"Sorry, one second." She picks up.

Lisa's voice is tight. "Henderson's just called. They want a breakdown of last year's order history by grade, by distribution centre, by month. Their procurement team needs it for a budget review."

"Okay. How long will that take?"

"If I drop everything else? Two days. Maybe three. The data is split across QuickBooks, the Google Sheet, and that one spreadsheet from when we switched to the new carrier. I'll have to cross-reference all three manually."

Sam closes her eyes. "Do it. Henderson's comes first."

She hangs up. Oscar is watching her.

"That was Lisa. Henderson's wants a report. It's going to take her two days to pull together because the data is in three different places."

"How long should it take?"

Sam opens her mouth. Closes it. “Five minutes. If our systems talked to each other, it should take five minutes.”

* * *

Before she leaves, Sam asks what happens next.

“I come out to Woodstock,” Oscar says.

Sam has paid for enough surprises this winter to ask the obvious question. “What does that cost?”

“Five thousand, plus HST. We call it a Discovery Sprint. I spend a day at MapleCo with Lisa and Ray and watch how the work actually happens. Then you get it in writing: every process mapped, every exception I can find, and a fixed price for each piece worth building.”

“So I pay you five grand to tell me what’s wrong with my business.”

“You pay me five grand to find out what you’re actually doing. You paid CloudSyncPro thirty to skip that part.” He shrugs. “The roadmap is yours either way. Hire me to build it, hire someone else, or put it in a drawer. I don’t guess at build prices on a sales call. That’s how you end up with a $15,000 connector nobody mentioned.”

Sam doesn’t have a comeback for that. She books it before she leaves.

Somewhere between London and Woodstock, Henderson’s report takes over the rest of her week. The note in her notebook that says *talk to Marcus* stays where it is.

* * *

The next week, Sam drives to Quebec to visit one of MapleCo’s longest-standing producers, a family operation near Portneuf that’s

been supplying them since 2003.

She makes this trip once or twice a year. Usually it's about pricing, quality, production forecasts. This time there's a reason. After the Golden Dragon mess and a winter of short counts on Ray's inventory sheet, she wants extra barrels of Grade A Amber set aside from this year's run, and that's a conversation you have in person. It's mid-March. The sap is running.

The sugar shack has changed since her last visit. New tubing. New monitoring equipment. The owner, Luc, walks her through the upgrades.

"See this?" He points to a small screen mounted near the mainline. "Every line has a vacuum sensor on it. If a line loses vacuum, I get a notification. I don't walk the bush every morning checking tubes anymore. The system tells me where the problems are, and I go fix those."

"How many taps do you run?"

"Twelve thousand. Used to be four thousand. With the old system, I couldn't manage more than four thousand because I was the monitoring system. I had to physically check everything. Now the system checks everything and I handle the exceptions."

Sam watches the sap flow through clear tubing into the collection tank. She watches it get pumped to the evaporator. She watches the operator, Luc's daughter, monitor a screen that shows temperature, density, and flow rate in real time. The daughter adjusts one dial, checks a reading, and goes back to her coffee.

"How many people run this now?" Sam asks.

"Three during sap season. Used to be seven. But the three aren't doing less work. They're doing different work. Better work. My daughter is a

better grader than I ever was because she has time to actually grade instead of spending half her day walking tubing lines."

Sam drives back to Woodstock the next morning. Nine hours. She doesn't turn on the radio. She doesn't make phone calls.

She keeps thinking about Luc's sentence: *I couldn't manage more than four thousand because I was the monitoring system.*

CHAPTER 4

The Mirror

Oscar shows up at MapleCo on a Wednesday morning at 8:15, fifteen minutes before Lisa arrives.

He brings a notebook. Not a laptop, not a tablet, a spiral-bound notebook with a pen clipped to the cover.

“I want to watch,” he says. “The process that actually happens, not the one you’d describe if I asked. There’s always a difference.”

Sam offers him coffee and a chair near Lisa’s desk. When Lisa arrives at 8:30, Sam introduces Oscar as “someone who’s going to watch how we work for a day. Just pretend he’s not here.”

Lisa gives Sam a look that says *I will absolutely not pretend he’s not here*. But there’s something else in the look too. Something harder. Lisa has been through this before. Three years ago, a “process consultant” watched her for a day, wrote a report that described her work incorrectly in fourteen different places, and recommended software that didn’t connect to QuickBooks. The software was purchased. It didn’t work. Lisa spent two months cleaning up the mess. Nobody apologized.

She sits down and starts her morning routine without a word.

Oscar watches.

* * *

At 8:37, Lisa opens her email. There are fourteen new messages since yesterday. She scans the subject lines, mentally sorting: purchase order, purchase order, tracking request, payment confirmation, spam, purchase order, question from a customer about grade availability, purchase order, supplier quote, spam.

She opens the first PO email. It's from Henderson's. A PDF is attached. She downloads it, opens it, and begins reading.

Oscar leans forward. "Talk me through what you're doing right now."

"Processing a purchase order." Lisa doesn't look up.

"Can you walk me through the steps?"

"I open the email. I download the PDF. I enter the data into QuickBooks. I update the tracker." Her voice is flat. Efficient. This is the version she gives consultants. The clean version. Three sentences that describe a fifteen-step process.

Oscar waits a beat. Then: "What about the pricing?"

Lisa pauses. She looks at him for the first time. That's not a consultant question. Consultants ask about software and systems. They don't ask about pricing.

"What about it?"

"Do you check it every time, or just for certain customers?"

Lisa glances at Sam. Sam nods.

"Every time," Lisa says. Her voice is still careful, but it's no longer the three-sentence version. "Henderson's is on a contract price sheet, but the prices changed in February and not all the old POs in the system

have been updated. So I cross-reference against the master price list." She opens a Google Sheet in another tab. "This is the price list. It was updated last month. But some customers are still on the old prices because we haven't sent them the new contracts yet."

"How many price lists are there?"

Lisa pauses. "Well, there's the master list in Google Sheets. There's a version in QuickBooks that's supposed to match but doesn't always. And then Henderson's has their own pricing agreement, which is different from the master list because they get volume discounts."

Oscar writes something in his notebook and underlines it.

* * *

By 10:30, Oscar has watched Lisa process four purchase orders. Each one took between 12 and 18 minutes. Each one involved opening at least three different applications. Each one required at least one cross-reference to verify a price, a customer code, or a product description.

He's also watched Lisa answer two phone calls (a customer asking about delivery status, which required Lisa to look up the order in her spreadsheet, then check the carrier website), respond to three emails (a supplier confirming a shipment date, a customer requesting an invoice copy, and the carrier asking her to resend a bill of lading she already sent yesterday), and rescue a stuck printer.

In two hours, Lisa has processed four orders and handled six interruptions.

Oscar asks to walk the warehouse. Sam hesitates, but agrees.

Ray meets them at the loading dock with the warmth of a man being introduced to his fourth consecutive consultant. “Morning,” he says. He does not ask Oscar’s name.

Oscar doesn’t seem bothered. He watches the warehouse for twenty minutes without saying anything. He watches a picker read a packing slip, cross-reference it against a handwritten note on the whiteboard, walk to the wrong aisle, walk back, check the note again, and then pull the correct pallet.

“That note on the whiteboard,” Oscar asks Ray. “How often does it change?”

“Whenever someone moves inventory and remembers to update it.” Ray pauses. “So, sometimes.”

“And when it’s wrong?”

“Then somebody ships the wrong thing and I get a phone call about it.”

Oscar writes in his notebook. Ray watches him write and says, “You going to fix that with an app?”

“I don’t know yet,” Oscar says. “I’m still figuring out if you have a whiteboard problem or a systems problem.”

Ray looks at Oscar for a long moment. “First guy who’s asked that,” he says.

* * *

Back in the boardroom, Oscar draws a timeline on the whiteboard.

“Here’s what I just watched,” he says. “One purchase order, start to finish.”

He maps it out, step by step:

1. Email arrives with PO attached
2. Lisa opens email, identifies it as a PO
3. Lisa downloads the PDF
4. Lisa opens the PDF and reads it
5. Lisa opens QuickBooks
6. Lisa creates a new sales order
7. Lisa types the customer name
8. Lisa types the PO number
9. Lisa types each line item (product, quantity, price). For Henderson's, that's three line items
10. Lisa cross-references the price against the Google Sheet
11. Lisa checks the exchange rate (Henderson's pays USD)
12. Lisa saves the sales order
13. Lisa opens the Google Sheet tracker
14. Lisa adds a new row with the PO details and marks it "Received"
15. Lisa moves the original email to a "Processed" folder

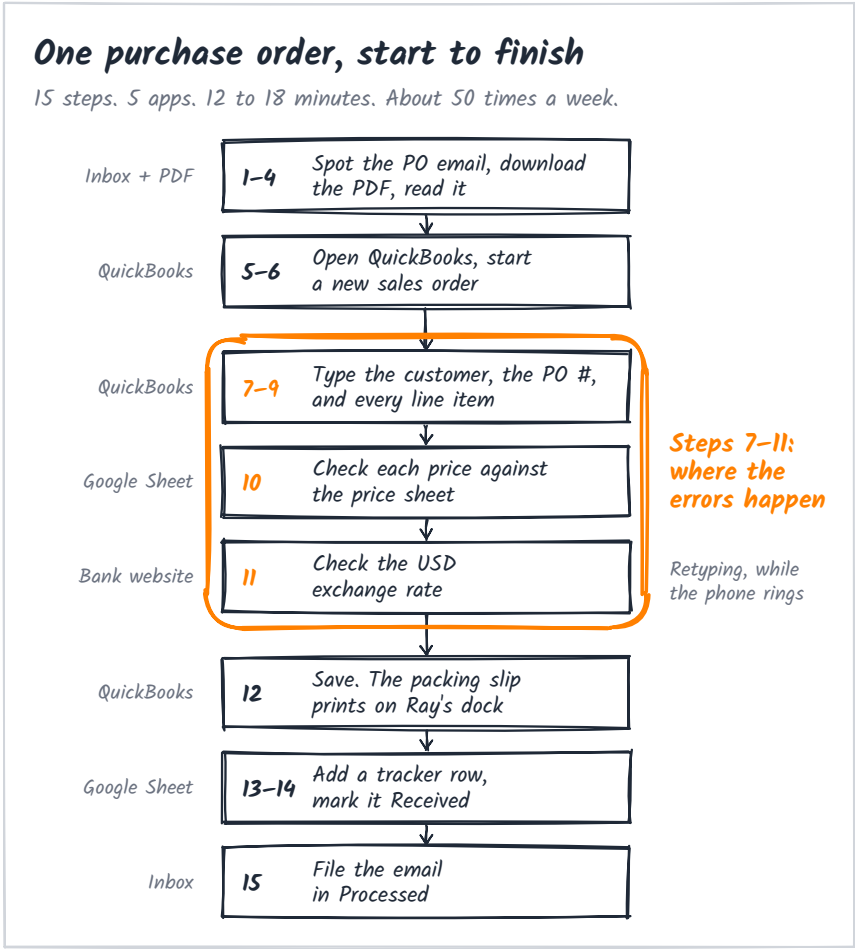
"Fifteen steps," Oscar says. "And that's a clean one. No exceptions, no questions, no phone calls in the middle."

Sam stares at the whiteboard. She knew Lisa entered POs, but she'd never seen it mapped out like this.

"Now multiply that by fifty to sixty orders a week," Oscar says.

At 15 minutes per PO, and 50 POs per week, that's 12.5 hours. Just for initial entry. Not counting tracking, invoicing, payment matching, or any of the dozen other manual steps that follow.

He circles steps 7 through 11. “This is where errors happen. Lisa’s careful. But everyone makes mistakes when they’re copying data for the twentieth time that day while also answering the phone.”



Sam thinks about Mrs. Chen. The wrong grade. A single field, and a rule nobody wrote down.

Lisa hasn’t said a word since Oscar started drawing. At lunch she goes out to the parking lot and sits in her car. Sam can see her from the

boardroom window. Ten minutes later Lisa comes back in and processes the next PO.

* * *

Oscar flips to a new section of the whiteboard and draws a staircase of five steps. He labels the bottom one *Manual* and the top one *Optimized*. Then he talks about only two of them.

"Stage 2 is tool-assisted," he says. "You have software, QuickBooks, maybe a CRM, but people do all the connecting work between the systems. Stage 3 is semi-automated. Some workflows run on their own, and people kick things off or handle the exceptions." He holds out the marker. "Where's MapleCo?"

Sam considers. QuickBooks. A Google Sheet tracker. A carrier website. The producers' portals. She's not running things on paper.

"Stage 3," she says. "Maybe late Stage 2. We have all these systems. They just don't talk to each other well."

"That's the answer I get from almost every owner. It's almost always a stage too high."

"What do you mean?"

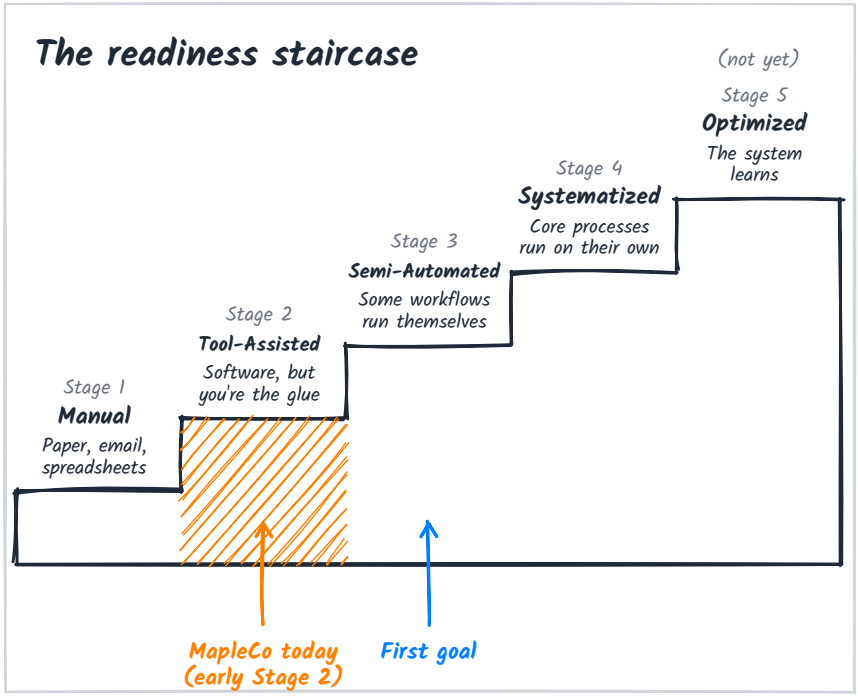
"Having software isn't the same as being tool-assisted. Being tool-assisted means the tools are actually helping. Lisa opens five applications to process one purchase order. She's not assisted by those tools. She's employed by them. She works for QuickBooks, not the other way around."

Sam opens her mouth to argue. They have systems. They're not some paper-and-fax operation.

Then she thinks about the six browser tabs, and the three price lists that don't agree, and Luc's sugar shack, where three people run twelve thousand taps. MapleCo has thirty people and fifty-some orders a week, and she still can't take a vacation.

She takes the marker and puts a mark on the low end of Stage 2.

He taps Stage 3. "That's where we're going first. Lisa goes from data entry to exceptions. You go from firefighting to approving."



* * *

"The next step," Oscar says, "is documenting how your business actually works. The real version, workarounds and all."

Sam shifts in her chair. “I kind of thought that’s what you just did. Watching Lisa.”

“That’s one process. You have dozens, and every one of them has exceptions, workarounds, and steps that only one person knows about.”

He tells Sam about a construction company he worked with. The owner said their invoice processing was “basic.” It turned out they had seven different approval workflows depending on the project, the contractor, and whether the amount was above or below $10,000. Two of those workflows existed only in the office manager’s head.

“So Lisa’s workarounds are the process documentation,” Sam says.

“Lisa’s workarounds are the business. Everything else is what you assumed.”

* * *

Oscar gives Sam homework.

“Before our next meeting, I want you and Lisa to do something. Pick your three most painful processes, the ones that eat the most hours and create the most errors. For each one, I want you to write down every single step. Not what the software manual says. What actually happens.”

He gives her a framework:

Who does each step? **What** system or tool do they use? **What data** are they moving, and from where to where? **How long** does it take? **Where** does it break? What are the common errors or exceptions? **What’s the workaround?** When something goes wrong, what does Lisa actually do?

“Don’t try to make it pretty,” he says. “I want the ugly version. The one where step four is ‘call Sam because she’s the only one who knows the password to the supplier portal’ and step seven is ‘check if the exchange rate looks right based on vibes.’”

Sam laughs for the first time in weeks.

“I’m serious,” Oscar says. “The ugly version is the valuable one. If you give me the clean version, I’ll build the wrong thing.”

On his way out, Oscar stops at the shelf by reception. Three bottles stand in a row, each a shade darker than the last.

“What’s actually different?”

Sam takes a sleeve of plastic tasting spoons from the drawer underneath. She keeps them for trade shows. She holds each bottle up to the window before she pours. “They grade it by how much light gets through. Golden is early in the season. Delicate. Amber is what most people picture. Dark comes later, and it’s strong.”

He tastes all three, then goes back to the Dark. “That one.”

“For what?”

“Pancakes. Saturday mornings.”

“Then Amber. Dark’s for baking. On a pancake, it shouts. Golden’s our niche grade. Chefs like it. Everybody else pours it on pancakes and wonders where the flavour went.”

He tries the Amber again, slower. “Okay. Amber.”

She sends him home with a bottle and won’t let him pay for it.

Passing the order desk, he thanks Lisa for her time. “Sure,” she says, without looking up from her screen.

* * *

Three days later, Sam calls Oscar.

She's calling because she's frustrated. Henderson's report took Lisa two and a half days. She rushed a batch of POs between calls and made three typos, one of them on a Henderson's order. A barrel delivery from Quebec showed up two days late, Ray ran out of Amber, and nobody noticed until a customer called to ask where their order was. And Sam has spent the last week answering questions, showing Oscar around, and doing homework instead of fixing any of these things.

"Oscar, I need to be honest with you. I'm paying you to fix my business and so far all we've done is talk about my business. When does the fixing start?"

"What would you fix first?" Oscar asks.

"The PO processing. Obviously."

"Then which customers send POs as PDFs? Which put the order in the body of the email? Which still fax? If a PO has a product code nobody recognizes, should the system reject it, hold it for Lisa, or guess?"

"Lisa would know."

"Lisa answers those in her head fifty times a week. If I don't know the answers, I build the clean version, and the clean version breaks on the first order that isn't obvious. Every contractor who disappointed you built the clean version."

"I know why you're asking. You've told me." Sam is pacing her office now. "What you haven't told me is how I'd know any of this is going somewhere. From here, it's a lot of questions and a notebook I've never seen inside. And Greg Hollis has a calendar."

Oscar doesn't answer right away.

"That's fair," he says. "I've explained why we need the questions. I haven't shown you where they go."

"One more session: you and Lisa, the homework, the ugly version. Then I write the roadmap, and you get it on paper. Then you and I sit down and pick what gets built first. You get the deciding vote. And from now on, when something's done, you hear it from me before you have to ask."

Sam writes three words on the back of an envelope: *Lisa*. *Roadmap*. *Pick*.

It's still another week before anything changes. She hangs up and calls Gerald.

"Your automation guy is driving me crazy. I told him he was all questions, and he agreed with me."

"Is that a problem?" Gerald says.

"I'll let you know in a week."

* * *

That night, Sam and Lisa stay late.

They start with purchase order processing, the obvious one. Lisa describes each step while Sam writes it on a legal pad. It takes longer than expected. There are steps Sam didn't know about. There are judgment calls Lisa makes unconsciously. She can tell from the formatting of a PO which customer it's from before she even reads the header. She knows which Quebec producer will still squeeze in a barrel order after the Tuesday noon cutoff, and which one never will. She knows that Grade A Golden has a longer lead time than Amber or

Dark. She mentions that Golden Dragon's "Dark" means Amber the way someone mentions the weather. Sam, who learned that rule the expensive way, stops writing for a second.

None of this is written down anywhere. It lives in Lisa's head.

They map out invoicing next. Halfway through credit notes, Sam's phone buzzes. Marcus: *Quick one. Toronto group wants last spring's Amber price before their call at nine.*

"Lisa, can you pull up…"

Lisa is already pushing the legal pad aside and reaching for her mouse.

Sam's thumbs are already typing *Lisa's on it*. She looks at the pad and deletes the message. "Leave it." Then she texts Marcus: *On your desk by 8:30*. That means coming in at seven and doing it herself. She turns the phone face down. "Credit notes."

Lisa pulls the pad back.

Then payment matching. By 8 PM, they have three legal pads full of messy, honest process documentation.

"This is kind of terrifying," Sam says, looking at the pages. "If you got hit by a bus tomorrow, none of this knowledge would survive."

"That's called key-person risk," Lisa says. Then, quieter: "I can keep fixing this manually, but that's not the same as this being fine."

Through the wall, one of Ray's forklifts beeps its way backward across the warehouse floor. The night crew is loading tomorrow's trucks.

"Can I ask you something?" Sam says. "The day Oscar was here. At lunch, you sat in your car."

Lisa caps her pen. "Ten minutes."

“Why?”

Lisa looks at the legal pads for a while before she answers. “Eight years, Sam. Eight years making sure this place doesn’t fall apart. And he wrote my whole job on a wall in fifteen lines. Like he was getting it ready to hand to a toaster.”

Sam wants to say the right thing. She doesn’t know what it is yet, so she says nothing.

“I’m not going anywhere,” Lisa says. “I just wanted you to know it felt like that.”

Sam writes *Lisa* at the top of a fresh page. She underlines it twice. It’s the only thing on the page.

CHAPTER 5

The First Win

Sam sends Oscar photos of the three legal pads. He studies them for three days. On the first, he texts her which day the roadmap will come. It comes that day, eleven pages with a fixed price on every piece, and he calls her to walk through it.

“I want to start with purchase order processing,” he says. “Not because it’s the biggest problem. Matching payments at month-end is actually a bigger time sink. But PO processing is the most visible. It’s where errors happen, it’s where Henderson’s feels the pain, and it’s where a win will be impossible to argue with.”

Sam appreciates this. She’d been bracing for a pitch to automate everything at once.

“Here’s what I want to build,” Oscar says. “And I want you to tell me if I’m wrong.”

He describes it step by step:

A purchase order email arrives in the shared inbox. The system detects it automatically, not by subject line, which is unreliable, but by checking the attachment type and scanning the first few lines. It downloads the PDF and sends it to an AI extraction engine that reads the document and pulls out every field: customer name, PO number, line items, quantities, grades, pricing, shipping instructions. The

industry calls that piece Intelligent Document Processing, or IDP. It's the only part of the whole design that's actually AI. The extraction runs on a business account under a data agreement, so MapleCo's purchase orders aren't used to train anyone's models, and Oscar writes down which provider sees which data, where it's stored, and who can read the logs.

That extracted data gets matched against MapleCo's customer database and price list. The system holds each order itself, as a draft, until it passes those checks. If everything checks out, known customer, valid products, correct pricing, the order is released and a clean packing slip prints on Ray's dock. When the order ships, the system posts the invoice to QuickBooks Online through its official API. Henderson's invoices post in US dollars, through the multicurrency MapleCo already has turned on.

If something doesn't check out, unknown customer, mismatched price, a product they don't carry, it flags the exception and sends it to Lisa with a clear summary: "Henderson's PO #0851, everything matches except line 3: they ordered 'Maple Butter, 500ml, 36 units' but our catalogue lists Maple Butter in 375ml. Please clarify."

Lisa reviews the exception. Makes one decision. Clicks approve or corrects the line. The system handles everything else.

"The robot does all the prep," Oscar says. "Lisa reviews a clean summary. She clicks once. The robot does all the follow-through."

"How long does this take to set up?"

"About five weeks. Two to design and build, one to test it against real orders, then a week or two running it alongside Lisa's manual process to make sure nothing's missed."

"And the cost?"

“Thirty-five thousand, plus HST. Fixed, for a project your size,” Oscar says. “That covers the AI extraction engine, the QuickBooks integration, testing, and sixty days of monitoring and support after go-live.”

Sam does the math. A second clerk would have cost $65,000 a year, and finding that out cost her six weeks and $15,000. CloudSyncPro cost $30,000 and sat on a shelf. This costs about the same as the software and a lot less than a year of the hire.

“What happens when QuickBooks changes something?” Sam asks. “Or a customer changes their PO layout? Or you get hit by a bus?”

It’s the same question she asked about Lisa. Oscar seems to like that.

“Bus first. Your data, your logins, your documentation: all yours, written down, not in my head. You get a licence to run it, and the code itself is an option if you ever want it. It talks to QuickBooks through the standard API, not screen-scraping.”

“And the rest?”

“The rest is the part nobody puts in the brochure. None of this is set-and-forget. QuickBooks updates its API. Henderson’s will redesign their PO one day without telling you. The AI models underneath get retired and replaced. Something will drift, and it’ll pick a bad week to do it.”

“So who catches it?”

“For the first sixty days, I do. After that, it’s what we call Managed Automation. Twenty-five hundred a month, plus HST. We host it. It’s monitored around the clock and alerts us when something drifts, and on that plan a person responds the same business day. We fix what breaks and retune it when a customer changes a template. Lisa still

owns the business calls, like approving the orders the system flags. We own the plumbing."

Sam raises an eyebrow. "So I'm renting you forever."

"If you'd rather run it in-house, that's an option, and I'll train whoever you pick. Most clients let us run it, for the same reason Ray doesn't service his own forklifts."

Sam thinks about the forklift tech who shows up once a month, and how Ray's forklifts never seem to die in the middle of a shipping day.

"What about the human approval step?" Sam asks. "Lisa still reviews everything?"

"During the parallel run, she does every order by hand alongside it, and we compare. After that, routine orders from known customers with standard pricing go straight through, and Lisa only sees the exceptions."

"Do it," she says.

"One more thing," Oscar says. "Send me your customer agreements. Before any customer's data goes through this, I want to check it against what you've signed."

That night she forwards Henderson's supplier agreement without opening it. Oscar's reply comes the next morning: *I read it. Section 8.3 is about how your people handle Henderson's data. The PO system is set up to meet it.*

Sam files the email under *later*.

* * *

The build takes five weeks.

Oscar's team is small. He does the architecture and the AI extraction himself, with a developer handling the QuickBooks integration.

"What happens when a customer orders a grade you're out of stock on?"

"What if the PO has a typo in the product name?"

"What does Lisa do when a PO arrives in a format she hasn't seen before?"

"What if the price on the PO doesn't match your price list. Who wins?"

"What does Lisa do that the PO doesn't say?"

Every answer reveals another edge case that a quick-and-dirty build would have missed. Oscar maps each one, decides whether the system should handle it automatically or flag it for a human, and builds accordingly.

The last question takes an entire afternoon. The first rule that comes out of it is one line long: *Golden Dragon: "Dark" means Grade A Amber*. Lisa dictates it. Oscar types it into the customer table. After eight years, it finally exists somewhere outside Lisa's head.

During the second week, Sam makes a suggestion. She's been watching the edge case list grow, and she's been watching the calendar. Greg's end of June is not getting any further away.

"Why not have the system reject anything it can't read perfectly? We handle the weird ones by hand for now and launch faster."

Lisa looks up from her desk. "How many is 'the weird ones'?"

"Five percent? Ten?"

“Closer to twenty. Every Henderson’s PO, because of the cover sheet. Every fax from the Niagara restaurants. Every new customer.” Lisa doesn’t raise her voice. “Henderson’s is the account we’re failing. If their POs go into a ‘handle manually’ pile, we haven’t solved anything. We’ve given the problem a new address.”

The room is quiet. Oscar lets it sit.

Sam looks at Lisa for a long moment. “Do it properly,” she says to Oscar. She’s still looking at Lisa.

Later that week, Oscar gets something wrong. He presents his draft of the pricing logic to Lisa. “When a PO comes in, the system checks the master price list. If the customer has a contract rate, it uses that instead. If neither matches the PO price, it flags for review.”

Lisa reads it. “That’s wrong.”

Oscar looks up. He doesn’t get defensive, but he’s clearly surprised. “Which part?”

“The order. You check the contract rate first, not the master list. If there’s no contract, then you fall back to master. And for Henderson’s, you don’t check either one first. You check the PO price against the contract, and if Henderson’s is quoting lower than our contract rate, you flag it, because it means they’re working off an old version and we need to send them the updated agreement before we fill the order.”

Oscar checks his notes. “That’s not what the process documentation said.”

“The process documentation said ‘check pricing.’ It didn’t say which pricing, in what order, with what exceptions. Because I wrote that documentation at 8 PM after mapping three processes on legal pads and I was tired.”

Oscar reads his draft again. “I missed that distinction.” He crosses out two lines in his notebook and rewrites them: contract rate first, then the master list, and a Henderson’s PO priced under contract waits until they have the current agreement.

He looks at what he’s written. “The documentation is always version one. The person is version twelve.”

Lisa almost smiles. Almost.

It costs a day. The developer has already built the price checks in the old order, and every pricing rule has to come apart and go back together in Lisa’s.

Oscar also spends an afternoon on a folding chair by Ray’s shipping desk, with a notebook and a coffee. Ray, despite himself, starts talking.

“Sometimes the slip’s wrong because somebody changed the order after I printed it,” he says. “Once or twice a week. I’ve got a system.” He gestures at the whiteboard and a binder that looks like it predates email.

“I’m not going to replace your system,” Oscar says. “I’m going to make sure the data that reaches you is right before it gets here.”

Ray considers this. “That,” he says, “would be new.”

* * *

Week three: testing.

Oscar runs a batch of real purchase orders, last month’s, which Lisa already processed manually, through the new system. The AI extraction correctly reads 47 out of 50 POs. The three it misses are: a handwritten fax from a restaurant that uses carbon paper (Sam laughs,

Oscar does not), a PO that was scanned at a 45-degree angle, and one from a new customer whose format the system had never seen.

“Ninety-four percent on the first pass,” Oscar says. “Two of those I can fix.”

He has the system straighten crooked scans before it reads them, and he adds the new customer’s layout to the extraction instructions. He reruns the batch. 49 out of 50.

The one left is the carbon-paper fax. Oscar holds the printout up to the window. Half the quantities are a grey smudge.

“No prompt fixes this,” he says. “Lisa can’t read it either. She calls the restaurant. So the system shouldn’t guess.”

He sets a confidence threshold, and he tunes it on real POs, because a model’s own sense of how sure it is isn’t a guarantee. When the system isn’t sure it read a field correctly, it doesn’t pick a number and hope. The PO goes straight to Lisa’s review queue, with the scan on one side, the system’s best reading on the other, and the shaky fields highlighted.

“The worst thing AI can do with a blurry fax is sound confident about it,” he says. “I’ll take ninety-eight percent and an honest exception over a hundred percent with a guess in it.”

It’s the first straight answer anyone has given to Ray’s question from the CloudSyncPro demo.

Then Oscar runs the test that counts. A batch you’ve tuned against stops being a test, so he pulls fifty POs from the month before, ones the system has never seen. It reads 48 of them correctly. That’s the number that goes in his report to Sam.

Lisa finds the two it got wrong. She has the batch spread across the boardroom table, each PO beside the system's reading of it, and she goes down them with a ruler.

"Hamilton," she says, at the second one.

A specialty grocer. A clean, typed PO, nothing smudged or crooked. Customer right. Product right. Price right. Quantity: twelve cases.

"They ordered four." She puts her finger on the line. Right beside the quantity, the PO has a column for pack size: twelve bottles to a case. The system read the wrong column, and it was sure of itself. Twelve cases of a real product at the right price is a perfectly reasonable order, so every check passed. It just isn't this order.

Oscar reads the line twice. Then he adds a check that does the arithmetic: quantity times price, line by line, against the totals printed on the PO. Twelve cases at $54 is $648. The PO says $216.

He reruns the Hamilton PO, and it lands in the review queue. Lisa doesn't click anything.

"When I press Approve, what am I approving? The whole order?"

"Just the highlighted line. The customer, the products and the contract price all passed. The line total didn't, so it's asking about that line. Approve means it read the line right. If it didn't, you correct it. Then the order carries on like any clean one."

"Where does it say that?"

Oscar looks at the screen. A customer name, four lines, one yellow field and a green button. Every check he just listed is in the log. None of it is in front of her.

They rework it at the boardroom table. The checks go above the button, one line each, passed or failed. The original PO sits beside

every order a person reviews, not just the shaky ones, with the questioned line highlighted. Under the button, one sentence says what she's confirming. And Lisa decides which doubts are worth a phone call. A price she can check against the contract herself. A grade or a quantity she can't be sure of, she calls the customer.

* * *

Week five: go-live.

They don't flip a switch. They run the new system alongside Lisa's manual process for a full week. Every PO gets processed both ways. At the end of each day, they compare results.

On Monday, the system matches Lisa perfectly on 8 out of 10 orders. The two mismatches are both pricing discrepancies: the system used the master price list, but two customers are on old contract rates that exist only in Lisa's head.

Oscar adds the two rates to the customer table. Tuesday: 12 for 12.

"That's a patch," he tells Sam. "You still have three price lists that don't agree. Sooner or later one of them will be wrong, and the system will believe it."

On Wednesday morning, Ray asks Oscar to come out to the dock. Not Sam. Oscar. Oscar brings Sam and Lisa anyway.

For the parallel run, the system prints its overnight slips to a tray of their own on the shipping desk, marked PARALLEL, beside the live ones from Lisa's manual entries. Ray has been through them with a pencil.

"These are right," he says. "They're just in the wrong order."

He fans them out. The system printed them in the order the emails arrived: a restaurant, a Henderson's distribution centre, a bakery, another restaurant. "The US truck loads first. The restaurants go on the afternoon run. I sort the live ones every morning before my guys get in. Now I've got two stacks to sort."

He lays one slip on the desk and puts a sticky note beside it, in Lisa's handwriting: *Toronto group called 9:10, cut to 20.* "Your slip says thirty. It was right at two in the morning. It's wrong now. Which one do I load?"

Oscar looks at the two pieces of paper for a while. "I've been treating the order and the slip as the same thing."

"They're not," Ray says. "The slip is me being told to move a pallet."

They work it out standing at the shipping desk. An order stays a draft until it's released to the warehouse, and the release is the instruction. Ray sets the release times, one for each carrier pickup, and decides which orders get a priority flag. Lisa lists what she has been passing along by phone and sticky note for years: the customers who change orders before nine, the two who want a call before every delivery. Sam names the customers whose dates are commitments, not preferences: Henderson's receiving windows, the Guelph co-op's flyer weeks, Golden Dragon's Thursdays.

Oscar changes the release and print logic that night. Slips print at Ray's release times, sorted by pickup, with the fixed dates on top. Every slip shows when its order was entered or last changed, and a change after release prints a replacement.

The next morning's PARALLEL stack comes out sorted. Ray reads it twice, then puts his pencil behind his ear.

By Friday, the system has processed 53 purchase orders, and Monday's two are the only mismatches. Lisa processed the same 53 orders manually, as she normally would, and found the automated version caught a pricing error that she had missed.

"The system caught my mistake?" Lisa says, sounding half-offended and half-impressed.

"The system never gets tired at 3 PM," Oscar says. "You do. Everyone does."

* * *

The following Monday, they go live for real.

Sam arrives at 8:15. She opens her laptop. On her dashboard, a simple web page Oscar built that pulls from the new order system and QuickBooks, she sees:

12 POs received overnight. 10 processed automatically. 2 flagged for review.

She clicks into the exceptions. The first one: a new customer whose company name doesn't match any record. Easy. Lisa will confirm it's a legitimate new account and add them. The second: a PO requesting a product that was discontinued last month. Lisa will call the customer and suggest an alternative.

Two decisions. Two clicks. Five minutes.

The same twelve orders would have taken Lisa two and a half hours to process manually. Price checks, cross-references, data entry, spreadsheet updates, all of it handled while Sam was sleeping.

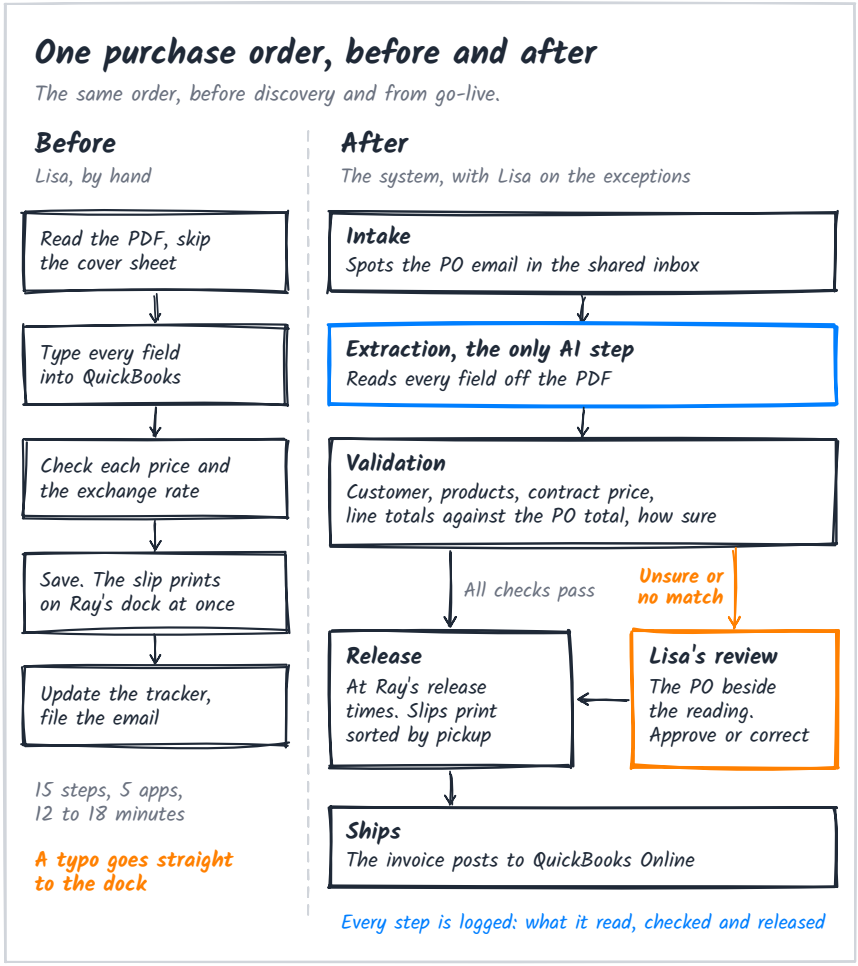
Sam looks at the dashboard for a while. Then she gets up and makes a second coffee, because she has time to.

She calls Oscar. “It works.”

“I know. I was watching the logs.”

“That’s a little creepy.”

“That’s monitoring. It’s what the sixty days are for.” Everything the system did overnight is in that log, he tells her: what it read, what it checked, what it released, and why. “If Henderson’s ever asks why you shipped something, you can show them the whole chain.”



* * *

Three weeks in, Sam is a convert.

The numbers are hard to argue with. Purchase order processing has gone from 12.5 hours per week to approximately 45 minutes of exception review. No errors in the first three weeks, and every PO is validated against the price list and customer database before it's released.

Lisa has 10 extra hours a week. She's using them to call customers she hasn't spoken to in months, chase outstanding invoices that have been sitting in AR for weeks, and work out which products have the best margins by customer segment.

"I didn't know I could do this kind of work," Lisa tells Sam one afternoon, looking up from a spreadsheet that she built herself, not as a workaround, but as an actual analysis tool. "I always thought I was the data entry person."

"You were never the data entry person," Sam says. "You were the person we couldn't afford to waste on data entry."

Lisa doesn't answer right away. Then: "That's the nicest thing you've said to me in eight years." She's joking. Mostly.

Henderson's hasn't said anything. No complaints. No "please confirm" follow-ups. Orders go out correctly and on time. The silence, Sam realizes, is the sound of things working.

Ray notices too, in his own way. "Third day in a row nothing's wrong," he says to no one in particular, holding a packing slip up to the light on a Tuesday afternoon. He sounds almost suspicious, like a man who's been burned too many times to trust a streak. "Henderson's keeps printing twice, though. Same numbers both times." Nobody asks him about it.

* * *

Here is the thing Sam hasn't told anyone.

She's been processing Henderson's POs herself. By hand. The old way.

Not all of them. Just the big ones. The weekly standing orders for the US distribution centres. The high-value seasonal orders. The ones where, if something goes wrong, Henderson's notices within hours.

She tells herself it's temporary. Just until she's sure about the cover sheet, the US-dollar pricing, the volume discounts, the product codes Henderson's uses that don't quite match MapleCo's catalogue.

Every night she pulls a comparison report: her entries against the system's, line by line. They match. They have matched every night for three weeks. Every morning she keys in the next one anyway.

On a Thursday afternoon, Sam is manually entering Henderson's weekly standing order. It's the forty-third PO she's touched this week, because she's doing the Henderson's ones on top of her regular work. She's tired. She's been at her desk since 7 AM. She's answering emails between line items.

The PO says 48 cases Grade A Amber, 24 cases Dark, 12 cases Golden. She types it in, cross-references the pricing, saves the order, and updates the tracker.

She doesn't notice the mistake. The system checks every line against the PO it came from. It would have flagged it.

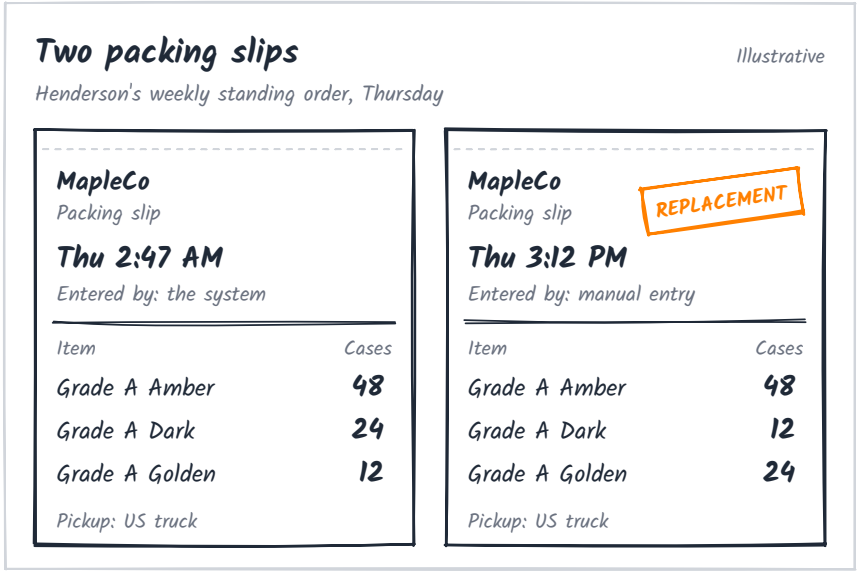
Her entry never reaches those checks. During the parallel run, manual entries skipped validation and released straight to the warehouse, so the system couldn't hold up Lisa's side of the comparison. Sam never switched that off. For three weeks, every one of her entries has released the moment she saved it and printed a replacement slip that

matched the system's. This one doesn't match. Its packing slip replaces the system's, and Ray's crew loads exactly what it says. Henderson's receiving dock counts the pallet against the PO and rejects it. MapleCo gets a call.

Lisa is the one who traces it. She pulls up the PO in the system and sees two entries: the automated one (correct) and Sam's manual one (wrong). The automated entry was created at 2:47 AM. Sam's manual entry was created at 3:12 PM, and it went to the dock without a single check.

Ray gets to Sam's office first.

He doesn't knock. Ray hasn't been in Sam's office since the Christmas party. He walks in, drops two packing slips on her desk, and taps the timestamps, one at a time.



"2:47 AM," he says. "3:12 PM. Guess which one my guys loaded."

He walks out. Lisa comes in behind him and closes the door.

“Henderson’s rejected the pallet. Dark and Golden were flipped.”

“How?”

“You entered it manually. The system had it right. Your entry overrode it.”

Sam looks down at the two packing slips. She can feel it coming. Not from Lisa. From inside her own chest. The thing she’s been avoiding.

“Sam. Why are you still entering Henderson’s orders by hand?”

“I just wanted to make sure…”

“The system has been right every time. You’ve been checking it every night. I know because I see the comparison reports you pull.” Lisa’s voice is steady. Not angry. Something worse than angry. Honest. “The system would have caught this. You’re the reason it didn’t.”

Sam has no answer.

“I catch mistakes for a living, Sam. I’m not going to watch you become the person who creates them because you can’t let go.”

Lisa stands up. She pauses at the door.

“Let the system work, Sam. That’s what you paid for.”

She leaves. Sam sits alone in her office. The two packing slips are still on her desk where Ray dropped them. The correct one says 2:47 AM. Sam was asleep.

She looks at them for a long time.

Then she deletes the comparison report she’s been running every night, and the folder of Henderson’s POs she’s been keying in by hand. She opens the settings page and switches off the bypass. Corrections are still possible. Anyone can still fix an order, but now

the fix goes through the same checks and the same release as everything else, with a reason and a name attached.

Gerald's words come back to her: *You didn't build this business to be its best employee.*

She calls Greg Hollis, explains the error, arranges the correction. She doesn't make excuses. She says it was a manual processing mistake, and that it won't happen again.

* * *

Two days later, Sam calls Oscar.

"I want to automate the payment matching next. And the shipping notifications. And the monthly reporting. Can we do all three at once?"

There's a pause on the other end of the line.

"No."

"I lost three weeks keying Henderson's by hand. I need to make up the time."

"Three builds at once is how you get something that works on test data and breaks in production. The PO system worked because we mapped it, tested it, and ran it alongside Lisa before anyone trusted it."

"Fine," she says. "One at a time."

"Before the next one," Oscar says, "two boring things. Neither one is an automation."

"Oscar."

“One price list instead of three, so the system and Lisa are reading the same numbers. That customer table is a patch, and patches leak. And the one-page AI policy we talked about in my office. Marcus asked me last week how I write the extraction prompts. He’s curious, which is great. Did you ever have that talk with him?”

Sam doesn’t answer that. She laughs instead, a little too hard. “Oscar, we sell maple syrup. We’re not CSIS. Nobody is stealing our secrets. And the price lists are fine now that you’ve got the customer table. I need hours back, not paperwork.”

Another pause.

“It’s your call,” Oscar says. “I’ll put both in writing so they stay on the list. Payment matching next, then?”

“No.” Sam has Henderson’s scorecard out of the drawer. She runs her finger down it. “Order accuracy. Delivery. Invoices. Nothing in here counts how many orders we type. And twice a week somebody on Greg’s team emails me to ask where a truck is.” She puts the scorecard down. “Shipping notifications. That’s the part Henderson’s can see.”

“Then that’s next,” Oscar says.

He prices the shipping notifications at $1,500 plus HST, fixed, and starts work. When a shipping label is created in the carrier system, the tracking number gets captured and emailed to the customer automatically. It bolts onto the pipeline that’s already running.

It goes live in four days. Greg Hollis sends Sam an email she’s never received before: “Hey Sam, whatever you changed with your shipping notifications, keep doing it. We’re getting tracking numbers within minutes now. Impressive.”

Sam screenshots that email and pins it above her desk.

* * *

Marcus has taken the PO system's success as permission. If a machine can read a purchase order, why is he still building buyer reports by hand? So he's been using his personal ChatGPT account to build small tools for himself. A prompt that summarizes customer emails. A template that drafts follow-ups to buyers. A prompt that turns a customer's order history into a trend report he can send before a sales call.

Some of these are genuinely helpful. The problem is what Marcus is feeding into ChatGPT to make them work.

Customer names. Order quantities. Pricing data. Contract terms. Lisa's notes on which customers get which discounts. And, lately, Henderson's product mix.

Marcus isn't being malicious. He's being efficient. And he still wants Henderson's. Twice now, Sam has said she'll think about it. This, to him, looks like a way to show her.

Nobody has told him not to. The AI policy is on Oscar's list, in writing, right under the price lists. Both are still on the list.

They can stay there about three more weeks.

CHAPTER 6

The Guardrails

The call comes at 7:45 AM on a Tuesday.

It's Henderson's. Not Greg Hollis, who sends the POs. Not the accounts payable person who sends the payments. It's someone from their legal and compliance department whose name Sam has never heard before.

"Ms. Laurent? This is Paul Kim from Henderson's vendor compliance team. I need to ask you some questions about your data handling practices."

Sam's stomach drops, though she doesn't yet know why.

Paul Kim explains: Henderson's is a publicly traded grocery chain. They have vendor data requirements. Specifically, they have a clause in their supplier agreement, Section 8.3, which Sam last renewed three years ago and has not read since, that states all vendor employees must follow Henderson's Acceptable Data Use Policy when handling Henderson's proprietary information. This includes order data, pricing, product mix, and promotional plans.

"We've become aware," Paul Kim says, in the careful tone of someone reading from a script, "that your organization may have been inputting Henderson's data into third-party AI tools without authorization."

Sam's mouth goes dry.

"Can you confirm or deny whether Henderson's purchase order data, pricing information, or order volumes have been shared with external AI platforms?"

Sam cannot confirm or deny because she genuinely doesn't know. She tells Paul Kim she'll investigate and call back within 24 hours.

She hangs up. Her hands are shaking.

* * *

She doesn't know the answer. She does know where to start. She's known since February, since the photo on Lisa's phone.

She calls Marcus and Lisa into the boardroom and closes the door.

"Henderson's compliance just called," she says. "Has anyone been putting Henderson's data into AI tools?"

Lisa looks at Marcus. Marcus looks at the table.

"I did a trend analysis," he says. "For Greg. It's their own order history. They're ordering fifteen percent more Amber this quarter. I think they're building up for a holiday promotion." He swallows. "I thought if Greg saw what we could do, you might…" He doesn't finish. "It was just ChatGPT."

"Did you send it to him?"

"Last Thursday."

"Show me."

Marcus opens his laptop and turns it around. The email to Greg Hollis is short and proud. Nobody asked him to send it. Under his signature

is one more line: *Here's the full interactive breakdown I ran for you!*

"Click the link," Sam says.

He clicks.

It's a ChatGPT share link. The whole conversation opens in a browser tab, readable by anyone who has the URL. Marcus scrolls, slower and slower. Six weeks of Henderson's purchase orders, pasted in raw. Product codes. Volumes. Per-unit pricing, the pricing that's under NDA. The addresses of their distribution centres. Lisa's notes on Henderson's volume discounts, copied straight out of her pricing sheet.

All of it typed into the consumer version of ChatGPT. No business account. No data processing agreement. And unless Marcus switched off a setting he's never heard of, OpenAI can use all of it to train future models.

Lisa reads her own notes on the screen and closes her eyes.

Nobody says anything. The page just sits there, open to anyone with the link, the way it has been since last Thursday. Greg clicked it. Of course he did. And then he did what Henderson's supplier agreement requires him to do. He forwarded it to compliance.

Sam's first instinct is anger. It doesn't last.

Most of this isn't Marcus's fault. Marcus was never told not to do this. Sam was supposed to tell him. Oscar asked her to, in his office, back in March. She wrote it down. Then Lisa called about Henderson's report, and the note stayed in her notebook. And before that, in February, she read one of his ChatGPT summaries and told him it was good.

There is no AI policy at MapleCo. Oscar recommended one twice, and twice Sam decided it could wait.

* * *

Sam calls Oscar.

She waits for the "I told you so." It doesn't come. Instead, Oscar asks a practical question.

"How bad is the Henderson's situation?"

"I don't know. Their compliance guy wants to talk tomorrow. I don't even know what to tell him."

"First, have Marcus delete that share link. Right now, while we're talking. Then tell him the truth. It was unauthorized use by an employee who wasn't given guidance. It wasn't malicious. You're implementing a policy immediately. And you're putting data controls in place."

"Will that be enough?"

"I don't know. But lying is worse. Henderson's is a public company. They've seen this before. They know every supplier has employees using AI tools. What they want to know is whether you're aware of it and whether you're doing something about it."

* * *

But the Henderson's situation is only half the crisis.

The other half arrives that same afternoon. Sam gets an email from a customer, a small restaurant chain in Niagara, saying they received an invoice dated for this month with last month's pricing. The old, lower

pricing. The new system posted the invoice when the order shipped, at the price on the master list. But the master list didn't have the price increase Sam agreed to over the phone with the chain's owner two weeks ago. She mentioned it to Lisa in the hallway. Since then, Lisa has been correcting the price by hand on every one of their orders, with a reason and her name attached each time. This one came in on a Saturday and shipped Monday at seven, before Lisa got to her desk. The automation didn't know about the increase, because the new price lived in a phone call, then in Lisa's head, and nowhere else.

It's the Tofino deposit all over again, Sam realizes. Agree to something out loud. Write it down later. Later never comes.

Sam issues a corrected invoice. The dollar amount is small. The chain's owner doesn't call back.

At 6:30, Marcus knocks on her door frame. He's holding a stack of paper.

He sets it on her desk without a word. It's the list. Every tool he's used since January. Every dataset he's pasted, with dates. The share link, marked *deleted, 9:04 AM*. Four pages, single-spaced.

"Nobody asked me for that," he says. "I figured somebody would." He takes a breath. "And if it helps with Henderson's, you can tell them the person responsible doesn't work here anymore. I'll write the letter tonight."

Sam reads the first page. Then the second. Then she pushes the stack back across the desk.

"You're not resigning."

"Sam…"

“You did something dumb with a tool nobody told you how to use. Telling you was my job, and I didn’t do it.” She taps the list. “You’re the only person in this building who knows exactly what we’ve put where. So you’re going to own the approved tool list.”

Marcus stands there for a second, like he’s waiting for the catch.

“Go home, Marcus.”

He goes.

That night, Sam sits in her office long after everyone has gone home.

How many of these failures are the system’s, she wonders, *and how many are mine?*

She picks up the phone. It’s 9 PM. She calls Oscar anyway.

He picks up on the second ring. She tells him about Niagara. He listens to all of it.

“That’s four this month,” he says. “Can you separate them?”

Sam thinks. “Marcus’s ChatGPT thing. That’s governance.”

“Good. What else?”

“The pricing error. We have three price lists that don’t agree. You told me to fix that and I said it could wait. That’s… data integrity? The system exposed a problem that was already there.”

“Good. What else?”

“Nobody caught the pricing error before it went to the customer. We need monitoring. Sanity checks.”

“Good. And the fourth one?”

Sam is quiet for a long time.

“The fourth one is me,” she says. “I was processing Henderson’s orders by hand because I didn’t trust the system. I caused the error. The system had it right. I overrode it.”

Oscar is quiet for a moment. “That’s the only one I can’t build for you.”

Sam stares at the ceiling. Out on the dock, the night crew is loading the last truck.

* * *

The next morning, Sam calls Paul Kim back, the way she promised.

She tells the truth. An employee, without malicious intent, used a consumer AI tool to analyze Henderson’s order data, then shared a link to it with Greg. The employee was not given guidance because MapleCo did not have an AI policy. That is MapleCo’s failure, not his. The link is deleted. She sends Paul Kim Marcus’s list: every tool, every dataset, every date, compiled before anyone asked for it. A one-page AI policy will be on his desk within two weeks, with the controls behind it.

Then she answers the rest of his question. Yes, Henderson’s purchase orders go through AI at MapleCo every day: the PO system reads them. It runs on a business account under a data agreement, and Oscar has it documented: which provider sees what, where it’s stored, and who can read the logs.

Paul Kim listens. He asks a few questions. Then he says: “Ms. Laurent, I appreciate your transparency. Most suppliers we flag on this either deny it or scramble to hire a lawyer.”

Sam waits for the but.

“But deleting a link doesn’t prove nobody kept a copy, and transparency doesn’t undo the exposure. We’re placing MapleCo on a 90-day vendor probation. During that period, we’ll be monitoring your data handling practices. We’ll need a copy of your AI policy, the documentation for that PO system, a signed attestation from every employee who handles Henderson’s data, and a quarterly compliance report. If everything checks out at 90 days, you return to standard vendor status.”

“And if it doesn’t?”

“Then we have a different conversation.”

Henderson’s also cuts its order volume by 15% for the length of the probation. Not as punishment, Paul Kim explains. As risk management. They’re diversifying supply until they’re satisfied MapleCo’s controls are in place.

Sam hangs up. The account isn’t lost. But it’s wounded. Fifteen percent of Henderson’s is real money, and for the next three months every order carries extra weight.

Greg’s end-of-June deadline is a week away, and her numbers are finally moving. Now there’s a second clock. This one is ninety days long, and it has paperwork.

* * *

Over the next two weeks, Sam and Oscar build three things.

The AI Policy. It’s one page. It says: use only the AI tools and accounts on the approved list, only with the data the list allows, and only for the purposes it allows. The list names each tool, the account, what data it may see, and who approved it. The PO system is on it,

under its data agreement. Marcus keeps the list. Sam approves what goes on it and reviews it every quarter. When in doubt, ask before pasting.

Sam shows it to Lisa. Lisa says, “This should have existed six months ago.” Sam agrees.

She shows it to Marcus. He reads it twice, then asks to be the one who walks the team through it. Sam says yes. It’s his list now.

Then she calls Dave. A one-page policy is a promise. Dave makes it harder to break. By Friday, MapleCo has a business ChatGPT workspace whose terms keep its data out of model training, and everyone signs in to it with their company account. Other AI sites are blocked on the office network and on every company laptop. The one thing Dave can’t do is block personal ChatGPT without blocking the business workspace, because they’re the same website. Personal accounts are the policy’s job.

“Now this,” Dave says, “is my trade.”

Oscar takes the other half: what data his automations touch, where it’s stored, and who can read the logs. “Marcus keeps the list,” he says. “Dave locks the doors. I watch the pipes.”

Oscar adds one more principle. “Your policy covers data. It should also say where the line is.”

“Routine, repetitive work is safe to automate with monitoring. Reading a PO, matching it against the database, sending a tracking number. The system does the work, and a person reviews the exceptions. Pricing exceptions, contract-sensitive communication, compliance reporting, anything where a wrong answer could damage a customer relationship or create legal exposure: that stays with a person. The system prepares. A person decides.”

“So if Henderson’s asks for a custom pricing agreement…”

“The system pulls the numbers and drafts the comparison. You make the call, and you send the email.”

Sam adds it to the policy. One paragraph. It takes five minutes.

The Single Source of Truth. This one takes a full week, and most of it happens at the boardroom table.

Oscar puts the three price lists on the big screen side by side: the master Google Sheet, the price list in QuickBooks, and Henderson’s contract rates in US dollars. Lisa brings a highlighter and a coffee the size of a flower vase. Sam brings the guilt.

In the first hour, they find forty-one products where at least two of the three disagree.

Some are easy. A price increase from February that made it into the Google Sheet and never reached QuickBooks. A gift basket MapleCo stopped making two years ago, still on the list, still with a price, still occasionally ordered.

Some aren’t. Three restaurant customers are on rates that exist in neither list. Lisa knows all three by heart. Sam agreed to one of them at a trade show in Toronto and wrote it on a napkin.

“Is the napkin still around?” Oscar asks.

“The napkin,” Lisa says, “is me.”

They go line by line. Every disagreement gets the same three questions: which number is right, who decided, and where is it written down? When the answer to the third question is “Lisa,” it goes into the database with a note saying who agreed to it, when it starts, and when it ends.

By Friday there's one price for every product and every customer, with Henderson's in US dollars at the contract rate. The automation prices every order from the database, and every invoice it posts to QuickBooks carries the same number. When a price changes, it changes once, in one place, and everything downstream updates automatically.

It comes with one rule, which Sam writes on the boardroom whiteboard herself: *No price, discount, or deposit exists until it's in the database.* Not a phone call. Not a hallway conversation. Not a napkin. Not a promise made from a campground in Tofino.

The Monitoring Layer. Oscar splits it into two jobs. The first is validation: every price on every order and every invoice has to match the database, or it doesn't go out. The second is watching for patterns nobody would spot one order at a time. A new customer gets flagged. A product code that isn't in the catalogue gets flagged. So does an invoice total far from a customer's usual, and so does anyone changing the same customer's price by hand, order after order.

"The usual-total check wouldn't have caught Niagara," Oscar says. "Last month's lower price *is* their usual. What should have caught it was Lisa changing their price on every order for two weeks. The system logged every one of those changes, and nothing alerted on them. That one's mine."

"No check finds a price nobody wrote down," he adds. "The rule on the whiteboard does that. This just tells us when someone's working around it."

Lisa reviews the flags each morning. It takes ten minutes.

* * *

That weekend, Sam sits in the stands at Maya's summer hockey camp.

She doesn't bring her laptop. She does bring her phone, and she checks it four times before the first drill is over.

It buzzes. An automated notification from the PO system: "Saturday batch: 3 POs received, 3 processed, 0 exceptions."

She reads it, smiles, and puts the phone back in her pocket.

Two minutes later, she takes it out and reads it again. Nothing has changed. She knows nothing has changed. She checks anyway.

CHAPTER 7

6:15 AM

Sam's alarm goes off at 6:15 AM.

Not 5:47. She changed it six weeks ago and has not changed it back.

She makes coffee first. Then she checks her phone.

The dashboard shows:

Purchase orders: 8 received overnight, 7 processed automatically, 1 exception flagged (new customer, needs verification).

Shipping notifications: All tracking numbers sent within 15 minutes of label creation.

Payment matching: Yesterday's deposits matched against open invoices. Two items need review: a Henderson's wire that covers four invoices (the system matched three and flagged the fourth for Lisa), and a restaurant payment that came in $86 short with no explanation, which the system won't accept on its own.

Monitoring: No anomalies. All systems green.

Sam reads the exception summaries. The new customer looks legitimate. It's a referral from Mrs. Chen, who has started sending other restaurant owners Sam's way. Sam approves the new account in the system and moves on.

Three decisions. Eight minutes.

The payment matching line is new. Phase 2: $10,000 plus HST, built over the summer, during probation, one careful piece at a time. Its support folds into the same monthly fee.

It started on a Wednesday in July, with Lisa's spreadsheet on the boardroom screen. Oscar had asked to see it twice. Twice, Lisa said "after month-end." The third time, she brought it in herself.

"Columns M through Q," she said. "Nobody touches them. Today you get to touch them."

Column M was the amount of the wire. N was the customer, which Lisa worked out from the reference number, because Henderson's reference numbers look like someone sat on a keyboard. O was the invoices she thought the wire covered. P was the difference. Q was a colour. Green meant matched. Yellow meant *probably, check Friday*. Red meant *call Henderson's accounts payable*. Purple, Lisa admitted after some pressure, meant *the bank took a fee, I wrote it off, and nobody needs to know*.

"There's a rule for purple?" Oscar asked.

"There's a rule for everything. It's just never been written down."

It took two afternoons to write it down. Henderson's paid four invoices with one US-dollar wire, minus a bank fee, and Lisa matched them by trying combinations of open invoices until the total landed within a few dollars, at the exchange rate on the day the wire arrived. One customer always short-paid by exactly the amount of a credit note they never mentioned. Another paid US-dollar invoices in Canadian dollars, every time, at whatever rate they felt like that week.

Oscar built the matcher to do what Lisa did, in the order she did it. It clears bank fees and exchange-rate differences under a limit Sam approved, and it stops and asks about everything else, including any

short payment nobody can explain. The first month-end it ran, it matched most of the deposits on its own. Lisa did the rest in an afternoon instead of two days.

“Purple’s in there too,” Oscar told her. “It’s called bank fee variance under the approved limit. Sam’s name is on the limit.”

Lisa looked at the screen for a while. She saved a copy, because she’s Lisa. Then she deleted the columns.

Sam gets to the office at 8:30. Not 7:15.

* * *

Lisa is already at her desk, on the phone with a producer in Quebec, negotiating next season’s rate on Grade A Amber. Her margin sheet is open beside the call. She built it in the spring, out of the hours the PO system gave back, and it is about to change what MapleCo sells.

Last week she booked the boardroom for twenty minutes and set a bottle of Grade A Golden on the table, next to the margin sheet.

“You’ve always called Golden the niche grade,” she said, and turned the sheet around. Golden had the highest margin per unit of anything MapleCo sold, and restaurant orders for it had gone up every month since spring. “I want to pitch a Golden Premium line to the high-end restaurants. Two chefs have already asked for it in a smaller bottle.”

It was the first product recommendation in MapleCo’s history that came with numbers attached. Sam said yes before she’d finished reading.

Lisa didn’t pick up the bottle. “There’s a second thing.”

She had it written down, four lines on an index card. The producer rates. The exception calls to customers. The questions Oscar’s team

brings her when a purchase order doesn't make sense. The sheet on the table. None of it was the job Sam hired her for.

"I spent eight years proving I could absorb boring work without complaining," Lisa said. "Turns out that's not the same as proving what I'm actually good at."

Sam read the card twice. She had known every line on it. She had never seen them in one place.

"You've been doing this job since June," Sam said. "I've been paying you for the old one. What's the number?"

Lisa told her. Sam had a number in mind too. Lisa's was higher. Sam wrote Lisa's down.

* * *

One Friday in September, Lisa closed her laptop at 5:15 because she was done. Actually done. She drove home without rehearsing Monday's inbox in her head. She stopped for groceries without calculating whether she had time. She made dinner at a normal hour and didn't check her phone once.

Nobody threw a party. It was just a Friday. It was the first one in years that started when she left the office.

* * *

Marcus walks in at 8:45 with a coffee and a stack of call notes.

Greg has asked him for a buyer analysis: which Henderson's regions are buying more Amber, and when. Marcus is building it in the company's ChatGPT workspace, from the sales export Lisa set up for exactly this. Both are on the approved list: the workspace, and the

data it's allowed to see. Before anything leaves the building, he walks the figures over to Lisa.

She reads the first page. "This is by quarter. What's Greg deciding with it?"

"Holiday orders." Marcus checks his call notes. "On Monday he said the Northeast ran out of Amber the second week of December. Two years running."

"Then quarters won't show him anything." Lisa breaks the totals into weeks. Every year, the Northeast's Amber orders climb through November and drop back to the standing order in the first week of December. Then she stops at the list of regions. "This one's in twice."

Marcus fixes it. "So they don't need a bigger November. They need the extra to keep coming through December."

"Put that on page one."

He does, and sends Greg the report as a PDF. Not a link.

He still keeps the approved tool list. It's an administrative job, and he does it like one: a spreadsheet, a quarterly reminder, a column for who approved what. Sam approves anything new for business use. Dave and Oscar look at the technical side first.

In September, when the probation ended, Sam gave him Greg Hollis's weekly call. Not the whole account. Just the call. It's the first piece of Henderson's she has let go of in twelve years.

* * *

Last Tuesday at 10:12 AM, Lisa got an email from Oscar's team.

Their monitoring had flagged that Golden Dragon's purchase orders were suddenly taking three times as long to process. Mrs. Chen had moved to a new ordering system with a new PO layout. Oscar's team had already mapped the new layout, and they'd found three things they couldn't decide on their own.

Two were small. A store code now sat where the delivery address used to be. A pallet deposit line shouldn't become a line on the order. The third was the one that mattered. The new system picked grade names from a dropdown. Did "Dark" on these POs still mean Amber?

Lisa called Mrs. Chen. Mrs. Chen laughed and said the new system chose the words for her now, so yes, Dark meant Dark. Lisa wrote back with all three answers in under ten minutes.

By two o'clock the updated extractor was live, after Oscar's team had run twenty test orders through it first. The rule Lisa had carried in her head for years, the one that cost Sam a courier and an evening last October, was retired for the new layout and kept for anything in the old one, with a note explaining why.

Nobody else at MapleCo noticed anything had happened.

Lisa noticed one thing. For years, people had asked her where the exchange rate was and why the printer was jammed. This time someone had asked her what a purchase order meant, because she was the one who'd know.

When Sam heard about it, she thought about Ray's forklifts.

* * *

Ray Beaulieu, for the record, has not become an evangelist for technology.

The release stack comes off the printer before his crew gets in, sorted by pickup, with the fixed dates on top. Ray reads the top slip, hands the stack to his lead hand, and goes out to look at the trucks. He hasn't phoned the office about a wrong packing slip since June.

He still has his whiteboard. He still has his binder. These days the whiteboard is mostly routing, and the binder mostly stays shut. The time he used to spend cross-referencing goes to the things he actually cares about: loads, routes, and making sure the Grade A Amber doesn't sit next to the heating vent.

* * *

The Henderson's account renewed.

The Q2 scorecard came in first. Order accuracy: 98%. Delivery timeliness: 96%. Invoice consistency: 99%. Above threshold on all three, for the first time in a year. Greg Hollis called to say so, which he didn't have to do.

The 90-day probation ended without incident. Every compliance report was clean. Every attestation was filed. Henderson's restored the 15% they'd pulled during probation, and Greg mentioned that MapleCo was being considered for their holiday promotion lineup. Not confirmed yet, but on the list.

When he told Sam, he said something that she wrote down: "We've been working with you for five years, and the last three months have been the most reliable. Whatever you changed, it shows."

She didn't automate the syrup. She automated everything around the syrup.

* * *

Gerald's quarterly review is the last Thursday in September, in his office above the pharmacy on Dundas Street, with the same pen he has used for twenty years.

He goes through the numbers in order. Revenue is up, by less than last year, and he pencils *Henderson's probation* in the margin beside it. Receivables days are down, because invoices now post the day an order ships. The shipping error rate is the lowest he has on file for MapleCo.

Then he turns to a fresh page.

"Last October," he says, "I told you your margin per hour of your own time was going down." He copies last year's figure onto the page. "How many hours a week are you working now?"

"Forty-five. Some weeks forty." She opens her notebook to the page where she has kept count since July. Gerald copies the numbers out, one week at a time.

Then he divides. He does it slowly, the way he does everything, and then he does it again to check. He writes the new figure under last year's. It's bigger. Not by a little.

He puts down his pen and takes off his glasses.

"Huh," he says.

Then he puts his glasses back on, and they move on to tax planning.

* * *

Oscar comes by the office one afternoon, not for a project meeting, just for coffee.

Sam's working from the boardroom. The whiteboard that Oscar covered in process maps back in March has been erased and rewritten a dozen times since. The current version shows MapleCo's automation roadmap: what's live, what's next, what's planned for next year.

"You've got a roadmap," Oscar says, looking at the board. "In March, you had six browser tabs and a prayer."

Sam laughs. "I also had a $30,000 software licence I was afraid to cancel."

"Did you cancel it?"

"Turned off auto-renew. It dies in January." She pauses. "I added it up, by the way."

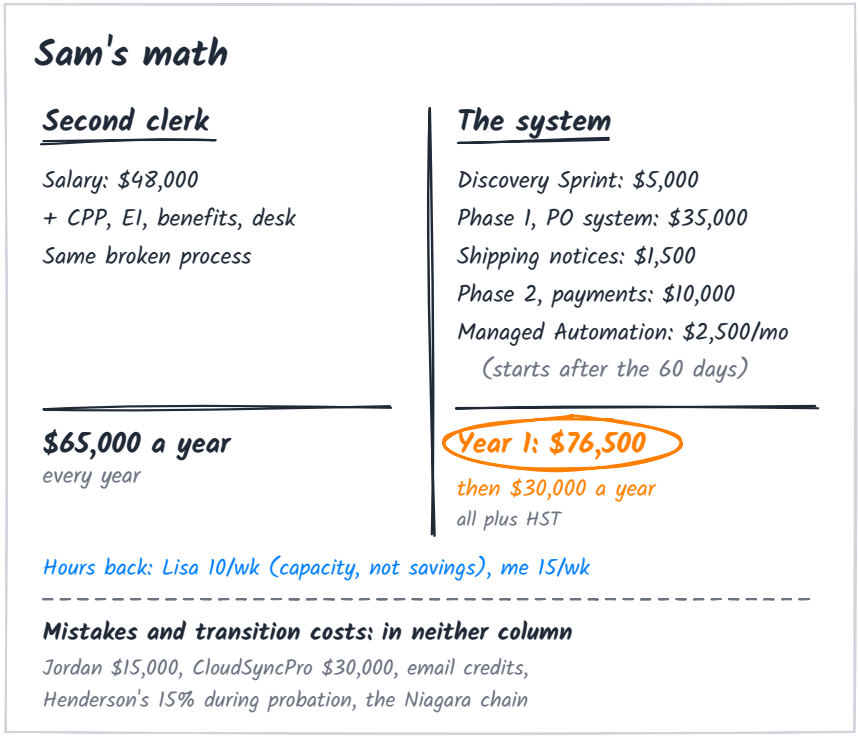
She walks to the whiteboard, grabs a marker, and draws two columns. Oscar watches, his coffee in one hand and his phone in the other.

"Second clerk," she says, writing. "Forty-eight thousand in salary. With CPP, EI, benefits and a desk, $65,000 a year. Every year."

She writes the second column. "The system. Discovery, Phase 1, the shipping notifications and Phase 2: $51,500. Managed Automation starts after the sixty days, so ten months of it in year one. That's $76,500, plus HST." She circles it. "More than the clerk. After that, it's $30,000 a year. Less than half."

Under both columns she draws a line and writes *mistakes and transition costs*. Jordan. CloudSyncPro. The credits after the email blowup. Henderson's 15 percent during probation. The Niagara chain, which had moved to another supplier by the time she called to follow up, politely and for good. "None of that goes in either column. It's spent whichever way I go, and it doesn't prove anything."

Under the second column she writes *Lisa: 10 hours a week*. “Those aren’t savings. She’s still here, and she’s about to cost me more, not less. That’s capacity.” Under it she writes her own: *Sam: 15 hours a week*.



Oscar looks at the whiteboard for a while. “Most people put the old mistakes in the new column. It makes the payback look faster.”

“I thought about it,” Sam says.

She caps the marker and looks at the roadmap. “Who keeps that moving next year? Me?”

“Some clients have us do it. A Fractional Chief Automation Officer: we sit in on the roadmap and keep it moving with them.” Oscar looks at

the board, then out at Lisa's desk. "You don't need that yet."

"How's Ray taking all this?" he asks.

"I asked him what he thought of the new systems. He thought about it for a long time." Sam does Ray's voice, badly. "'The packing slips are right now.' That was the whole review."

* * *

Oscar finishes his coffee and stands up.

"Can I give you one piece of advice?" he says.

"You're going to give it whether I say yes or not."

"Probably." He leans against the doorframe. "The owner has to let go. You can build good systems and still choke the business if you insist on being the monitoring system yourself."

Sam winces. "The Henderson's override."

"The Henderson's override. Every owner I work with hits that wall. Building something that works without you isn't a loss. It's the whole point."

Sam looks at the roadmap. "You could have told me that on day one."

"Would you have heard it?"

She thinks about it. "No."

"That's why I didn't."

"You've checked our dashboard three times since you sat down," Sam says. "For a coffee."

Oscar looks at the phone in his hand. He puts it in his pocket.

“Old habit,” he says.

Sam walks him out.

* * *

On the first Friday in October, at 3:45 PM, Greg Hollis emails.

Henderson’s wants a product-by-product breakdown and a proposed assortment for the holiday promotion. Sixty-two stores, custom mix, regional preferences. He needs it by Wednesday.

Maya’s first game of the season starts at 5:00. The arena is twenty minutes away.

A year ago, this is the email that would have kept Sam at her desk until midnight, pulling numbers from three spreadsheets that didn’t agree. She’d have done it from a campground if she had to. She has.

Sam starts opening tabs.

Lisa looks up from her margin analysis. “Go to the rink.”

“It’s Henderson’s.”

“I know who it is. The data’s in one place now. Marcus and I have this.”

Sam looks at the email. Then at Lisa, who hasn’t gone back to her screen, and at Marcus, who already has the Henderson’s export open. Then she closes the tabs, one at a time, shuts the laptop, and picks up her coat.

She’s halfway to the door when Lisa says it anyway. “Sam. Go.”

“I’m going.”

* * *

Sam gets to the arena with ten minutes to spare. Ben is already in the stands behind the net Maya defends in the first period, his coat on the seat beside him. He moves it when he sees her. He doesn't make a thing of it. He just hands her the second coffee he bought on the off chance.

During warm-up, Maya spots her through the cage and does a double take. Then she taps her stick on the ice, twice, which Sam is fairly sure is goalie for *hi, Mom*.

The game starts. Sam's phone is in her pocket, not her hand.

At the end of the first period, her hand goes to her pocket on its own. Twelve years of muscle memory. There's one text, from Lisa:

Henderson's proposal sent. Five days early, Golden Premium margin breakdown attached. Marcus checked every SKU. Ray says hi, which is a first. Also, I took away your QuickBooks login until Monday. Watch the game.

Sam laughs out loud, loud enough that the parent on her other side looks over. She holds the side button until the screen goes black and drops the phone into her coat pocket.

Ben watches her do it. He doesn't say anything. He bumps her shoulder with his, once, and leaves it there. They stand up together as Maya skates back out to her crease.

Maya's team wins 3-1. Sam walks to the parking lot with her arm around her kid and Ben carrying the goalie bag, talking about the game, not about invoices.

A year ago, Sam was a data entry clerk who happened to own a maple syrup company.

Today, she's the owner again.

Afterword

In Chapter 1, Sam sits in her driveway with the engine off and thinks: *There has to be a better way to do this.* Most owners who call me have had that thought somewhere, usually late at night. The businesses that thrive are the ones where it leads to action.

Sam's story is fictional. Her company doesn't exist. But her problems do. I've seen them in construction companies where the bookkeeper enters every subcontractor invoice twice, once in the project management system, once in the accounting system. I've seen them in healthcare clinics where the billing team spends half their day fighting with payer portals. I've seen them in law firms where the practice management software is so old it can't connect to anything, so the staff prints documents and re-enters data by hand. I've seen them in Indigenous band offices where overworked administrators spend days assembling federal reports that could be generated in hours.

Every one of those organizations had a Sam. Every one of them had a Lisa, someone brilliant, buried under work that didn't deserve their talent. And every one of them had the same realization, sooner or later: the problem isn't the people. It's the systems.

Systems aren't the whole story, though. Sam's fourth failure was Sam. I don't write this from the finish line. I juggle customer projects, sup-

port, and products of my own too. I can get interested in the next useful thing to build while some ordinary piece of work still depends on me remembering to do it. Knowing how to automate something doesn't automatically make you good at delegating it, or at stepping away from it. That's part of why this subject matters to me.

If you keep five things from Sam's year, keep these.

Start with your problem, not with technology. Sam hired, bought software and had Dave wire up a zap before anyone wrote down what the work actually was. Each fix was aimed at a problem nobody had described.

See your business clearly. The real process is the one Lisa does, with the cover sheet, the three price lists and the rule about Golden Dragon. The three-sentence version is the one that gets automated wrong.

Start small. One workflow, tested on orders it had never seen, run alongside the manual process until the results matched. Then the next one.

Build guardrails. A one-page AI policy, one price list, and monitoring that tells someone when a person is working around the system. Sam built all three after they cost her. Build yours before.

Invest in your people. The system gave Lisa back ten hours a week. What made them worth something was Lisa.

The rest follows.

About the Author

I run DigitalStaff, a business automation agency in London, Ontario. Since 2017, we've built custom AI and automation for more than 50 organizations across construction, healthcare, distribution, legal, education, non-profit and Indigenous communities.

I found automation at twelve: a bot I downloaded to mine iron ore in RuneScape overnight on the family computer. Years later I built my own, one that fought scorpions. That's the one I tell Sam about in Chapter 3. I still can't play RuneScape.

Bring me one workflow

If Sam's story sounds familiar, book a free intro call with me. Bring one workflow that eats your team's week, and a completed discovery worksheet from Appendix A if you've filled one in. You tell me how the work actually happens today. I'll tell you what's worth automating, what isn't, and roughly what it would take.

Book a time at digitalstaff.ca/contact.

Thank you for reading. Now go build something.

Appendix A: Your 90-Day Playbook

Sam's story took a year, and most of that year was detours: a hire, a software licence, a zap that went off at 2 AM, an override, and two boring fixes she put off until they bit her. Strip out the detours and the first real win fits in about ninety days.

Ninety days gets you a first win, not a finished system. The schedule below is an example. Yours will stretch or shrink with the work.

Weeks 1 to 2: Pick the problem

Pick one problem and measure the baseline: hours a week, errors a month, how long a customer waits. Find out which AI tools your people already use, and for what. Name an owner for the problem and an owner for the AI rules. Put the minimum AI rules and the approved accounts in place. Appendix D is a starting point.

Sam wrote her AI policy after the crisis. Write yours in week one.

Weeks 3 to 4: Document it

Write down the real steps and the exceptions, the ugly version. The worksheet below helps. Decide which data source wins when two of them disagree. Check your providers' terms and your customer agree-

ments before customer data goes near a new tool. Choose the pilot. Decide what success looks like, and what the fallback is if it doesn't work.

Weeks 5 to 8: Build and test one workflow

Build one bounded workflow. Test it on representative samples, then on samples nobody has tuned it against. Keep a person reviewing anything the system is unsure about, release work in a controlled way, and log and monitor everything. Run it in parallel with the manual process where that makes sense. You won't find every edge case in advance, so plan for the ones you miss.

Weeks 9 to 10: Measure and tighten

Measure the results against your baseline. Strengthen training and controls where the pilot showed gaps. Clean up the old tools, spreadsheets and stored data the new workflow replaced. Confirm your people can still run the fallback.

Weeks 11 to 12: Choose what's next

Use the measured results to choose the next process. Write down who owns the new workflow and who supports it.

The goal isn't to automate everything. The goal is to stop being the glue, to build systems that let your business run without requiring your involvement in every transaction, every approval, every email.

The Numbers That Matter

When it's working, here's what you should see:

Hours reclaimed: In Sam's case, about ten hours a week for Lisa plus two days at every month-end, and about fifteen hours a week for

Sam, once the PO system, the shipping notifications and payment matching were all running. Measure yours against the baseline you took in week one.

Error reduction: An illustrative target, not a promise: something like 90 to 95% fewer data entry mistakes on the workflow you automated. Your baseline tells you whether you got there.

Response time: Customer inquiries answered in minutes, not hours.

Owner time: Your work shifts from operational to strategic, from data entry to decision-making.

Key-person risk: Reduced, because the system holds the knowledge that used to live in one person's head. Appendix B helps you find it.

Outside the Story

Every price in Sam's story is an example: what a project of MapleCo's scope costs. Outside the story, DigitalStaff offers four things.

Discovery Sprint. The work mapped as it actually happens, exceptions included, and a written roadmap with a fixed price for each piece worth building. The roadmap is yours either way.

Builds. One workflow at a time, at a fixed price agreed after discovery, with monitoring and support after go-live.

Managed Automation. A monthly service after a build: hosting, monitoring that alerts around the clock, a person who responds within your plan's response time, fixes, and retuning when something changes.

Fractional Chief Automation Officer. Roadmap leadership plus build capacity, for owners who want someone driving the roadmap with them.

For current prices, see digitalstaff.ca/pricing.

Worksheet: Process Discovery

These are Oscar's questions from Chapter 4, laid out as a worksheet. Fill one in for each of your three most painful processes. Sam and Lisa filled three legal pads.

Write the ugly version: one step per row, in the order the steps really happen, including the one where step four is "call the owner because she's the only one who knows the password." Count active time, the minutes someone is actually working on it, separately from waiting and interruptions. Then list where it breaks, and every rule that lives in someone's head.

Example: a customer purchase order at MapleCo, before automation

Starts when a PO email lands in the shared inbox. *Ends when* the packing slip prints on Ray's dock. *Who:* Lisa, every step.

#	Step	System	Data moved	Active time	Waiting, interruptions
1	Spot the PO, save the PDF	Shared inbox	PDF, email to desktop	1 min	Sits until Lisa gets to it
2	Start a sales order, type every field	QuickBooks Online	Customer, PO number, lines: PDF to QuickBooks	5 to 8 min	Phone calls, emails, the printer
3	Check each price	Price sheet, contracts	Prices, sheet to QuickBooks	2 to 4 min	Asking Sam about a deal only she knows
4	Check the exchange rate (US customers)	Bank website	Rate, bank to QuickBooks	1 min	

#	Step	System	Data moved	Active time	Waiting, interruptions
5	Save. The packing slip prints	QuickBooks Online	Order, QuickBooks to Ray's printer	1 min	
6	Add a tracker row, mark it Received	Google Sheet	PO details, QuickBooks to sheet	2 min	
7	File the email	Shared inbox	None	Under 1 min	

Totals: 12 to 18 minutes of active time per order, about 50 orders a week. Six interruptions in one two-hour morning.

Where it breaks

- Step 2: a wrong quantity or grade, typed while the phone rings.
- Step 3: three price lists that don't agree, and prices agreed by phone that aren't on any of them.
- Step 5: an order changes after its slip prints, and the dock loads from the old slip.

Exception rules nobody wrote down

- Henderson's: skip page one. It's a cover sheet.
- Henderson's: a PO priced under the contract rate means they're working from an old agreement. Send the current one before filling the order.
- Golden Dragon: "Dark" means Grade A Amber.
- Carbon-paper faxes: if a quantity is smudged, call the restaurant. Don't guess.

Now yours. Process: _____

Starts when: _____

Ends when: _____

#	Step	Who	System	Data moved (from, to)	Active time	Waiting, interruptions
1						
2						
3						
4						
5						
6						
7						
8						

Where it breaks

- Step _____: _____
- Step _____: _____

Exception rules nobody wrote down

- When _____, do _____
- When _____, do _____

Worksheet: Sam's Math

Compare hiring and automating for the same work, over the same period, in the same units: one year, the same workflows, dollars before tax, hours per week. Sam's numbers are filled in as an example.

Line	Hire a second clerk	Automate the work
Work covered	PO entry, tracking emails, payment matching	The same three workflows
Cost, year one	$65,000, plus a recruiter's fee and training time	$76,500: $51,500 for discovery and three fixed-price builds, plus ten months of Managed Automation at $2,500
Cost, each year after	$65,000, plus raises	$30,000
Avoided hire (all-in: salary, CPP, EI, benefits, equipment)	None. This is the hire.	$65,000 a year
Cash costs reduced (credits, couriers, reships, write-offs)	Few. The process stays the same.	Fewer credits, couriers and reships. Measure them; don't guess.
Staff capacity recovered (capacity, not payroll savings)	A new person's hours, minus the training	Lisa: about 10 hours a week, plus two days at month-end
Owner hours recovered	Little. Sam still checks everything.	Sam: about 15 hours a week
Customer and concentration risk	The rules still live in people's heads	The rules live in the system. Henderson's is back above threshold.

Mistakes and transition costs. Keep these on their own line, in neither column: Henderson's 15% cut during probation, the Niagara customer Sam lost, the credits after the email blowup.

Sunk costs. Leave out what you've already spent. Jordan's $15,000 and CloudSyncPro's $30,000 are gone whichever way Sam goes. They don't make either column look better or worse.

Now yours:

Line	Hire	Automate
Work covered	_____	_____
Cost, year one	_____	_____
Cost, each year after	_____	_____
Avoided hire (all-in)	_____	_____
Cash costs reduced	_____	_____
Staff capacity recovered	_____	_____
Owner hours recovered	_____	_____
Customer and concentration risk	_____	_____
Mistakes and transition costs (separate)	_____	_____

Self-Check: The Readiness Staircase

Check one workflow at a time, such as purchase orders. Different workflows can sit at different stages: your invoicing might be at Stage 3 while your purchase orders are still at Stage 2. Tick every statement that's true for the workflow. It sits at the highest stage where you can tick every box.

Stage 1: Manual. Everything done by hand. Spreadsheets, email, paper.

- ☐ There's no business software for this work, or nobody uses it.
- ☐ The only record of the work is paper, email or a spreadsheet.

Stage 2: Tool-Assisted. You have software, but people do all the connecting work between systems. You're the glue.

- ☐ The work runs through business software, such as accounting, inventory or a CRM.
- ☐ People copy the same information from one system into another by hand.
- ☐ Nothing moves to the next step unless a person moves it.

Stage 3: Semi-Automated. Some steps run on their own, but someone still kicks them off or handles exceptions by hand.

- ☐ At least one step runs without anyone touching it, such as a confirmation or a tracking email.
- ☐ When the system can't handle something, it goes to a named person with what they need to decide.
- ☐ Someone gets an alert when a step fails, before a customer notices.

Stage 4: Systematized. Core processes run on their own. People handle exceptions and strategy.

- [ ] Routine cases run start to finish without a person, and people see only the exceptions.
- [ ] Every action is logged, so you can show a customer why something happened.
- [ ] The business rules, such as prices and customer quirks, live in the system, with an owner for each.

Stage 5: Optimized. The system learns and improves.

- [ ] You measure the workflow continuously and change it based on what the numbers show.
- [ ] The system surfaces improvements from its own data, without waiting for someone to notice a problem.

The honest answer: If your team opens five applications to process one order, those tools aren't assisting them. Your team is working for the tools. Sam picked Stage 3 for her purchase orders. She was early Stage 2.

Appendix B: Your Lisa

Every business runs on rules nobody wrote down. They live in one person's head, and they work until that person is out sick, on vacation, or gone. Sam found hers the expensive way. Find yours on purpose.

The worked example: Golden Dragon

- **The rule:** Golden Dragon writes "Dark" on every purchase order, but they want Grade A Amber.
- **Who knows it:** Lisa. Mrs. Chen told her on the phone, years ago.
- **Where it's written:** Nowhere.
- **What breaks when she's away:** whoever covers types what the paper says. Golden Dragon got Dark three times in one year. The third time cost Sam a courier, a credit note, an evening, and a line from her best restaurant customer: "We need to be able to count on the order being right."
- **Where it lives now:** one line in the customer table. When Golden Dragon moved to a new ordering system, Oscar's team asked Lisa whether the rule still applied. It was retired for the new layout and kept for the old one, with a note saying why.

Where to look

- What does your Lisa change on an order before she enters it?
- Which customers change their orders before nine, or want a call before every delivery?
- Which prices, discounts or deposits were agreed out loud? Sam's were on a napkin, in a hallway and in a phone call.
- Which passwords does only one person know?
- If your Lisa took two weeks off, what would someone have to call her about?

Your list

The rule	Who knows it	Where it's written	What breaks if they're away	Owner from now on

Appendix C: Lisa and Ray's Questions

Take this page to any automation demo, including ours. Every question comes from Sam's story.

- [ ] **Does it skip the cover sheet?** Lisa asked CloudSyncPro. Bring your three ugliest real documents.
- [ ] **What does it do with a carbon-paper fax?** Ray's question. The right answer is a person, not a confident guess.
- [ ] **How does it match one wire to four invoices?** And what does it do with bank fees, exchange rates and short payments?
- [ ] **What happens when it isn't sure?** Who sees it, with the original beside the reading? How was the threshold tested?
- [ ] **Who gets the alert at 2 AM, and when do they respond?** Get the response time in writing.
- [ ] **Who owns the code, the documentation and the logins?** Is the code yours, licensed, or yours to buy later? Your data, logins and documentation should be yours, in writing.
- [ ] **What happens when a customer changes their PO layout?** Who notices, and who decides what the new fields mean?
- [ ] **What does year two cost?** The monthly fee, what it covers, and what's extra.
- [ ] **Where does our data go, and is it used for training?** Which provider sees it? Who reads the logs? Is there a data agreement?

Appendix D: Sam's AI Policy (Template)

This is the one-page AI policy Sam wrote for MapleCo after Henderson's called. Adapt it for your business. Your obligations depend on your organization, your province and your customer agreements, so check them. In Canada, the privacy commissioners' joint principles for generative AI are a good place to start.

Maple Syrup Co. (MapleCo): AI Use Policy

Purpose. This policy sets out how MapleCo employees may use AI tools at work, so we get the benefit without putting customer, financial or employee information at risk.

Approval owner: [name, role]. **Effective date:** [date].

Approved tools and accounts. Use only company-approved AI tools and accounts for approved work. The approved list names the provider, the account or workspace, what data it may receive, what it may be used for, important settings, and who approved it. Approving a tool does not approve its plugins or connectors.

Data rules. Customer, financial, pricing and contract information may be used only in an approved tool, for an approved purpose,

where the provider's terms keep our data out of model training, and where retention, access and sharing have been reviewed against privacy law and our customer agreements. Use the minimum information needed. Never enter passwords, API keys or access codes. Sensitive employee information needs specific approval.

Review and sharing. People stay responsible for decisions and for anything sent outside the company. Check facts and numbers before relying on an output. Do not create or send shared AI conversations that contain company or customer information without approval. Read the whole shared content before sending.

Human review. Routine, repetitive work can be automated with monitoring. Pricing exceptions, contract-sensitive communication, compliance reporting, and anything where a wrong answer could damage a customer relationship or create legal exposure stay with a person. The system prepares. A person decides.

When unsure, and when something goes wrong. If the tool, account, data, purpose or sharing isn't clearly approved, stop and ask the approval owner. Report accidental uploads or shares right away. Deleting a link does not prove nobody kept a copy.

Ownership and upkeep. The business owner approves use, with technical and contractual review where needed. Employees get examples and acknowledge this policy in writing. Approvals are reviewed quarterly and whenever a provider, setting, connector or workflow changes. Good-faith mistakes are reported without penalty. Repeated violations go through normal management.

Acknowledged by: [name, signature, date]

Appendix E: Technology Glossary

AI (artificial intelligence): Software that works from patterns learned from data instead of fixed rules, so it can handle input that changes, like a purchase order layout it has never seen. It's good at reading, classifying and summarizing. It can also be wrong while sounding sure, which is why its output gets checked. In Sam's PO system, only the reading step is AI.

API (application programming interface): A supported way for one program to read from or write to another without anyone clicking through screens. MapleCo's system posts invoices to QuickBooks Online through its official API. What an API can do varies by product, edition and plan. The standard QuickBooks Online accounting API, for example, doesn't handle sales orders, so MapleCo's system holds each order itself.

Automation: Software that follows rules: when this happens, do that. Predictable, and usually the cheapest place to start. The shipping notifications in Chapter 5 are automation.

Confidence threshold: The line below which the system doesn't trust its own reading of a field, and sends the document to a person instead of guessing. It's set by testing on real samples, because a

model's own sense of how sure it is isn't a guarantee. It's how the carbon-paper fax ends up with Lisa.

Discovery Sprint: DigitalStaff's fixed-price first step. Oscar watches the work as it actually happens, maps the processes and the exceptions, and delivers a written roadmap with a fixed price for each piece worth building. The client keeps the roadmap whether or not they hire DigitalStaff to build it.

Exception: A case the system can't or shouldn't handle on its own: an unknown customer, a price that doesn't match, a field it can't read. It goes to a person with a summary of what didn't match.

Fractional Chief Automation Officer: DigitalStaff's ongoing service for owners who want someone driving the automation roadmap with them, with build capacity included. Oscar mentions it once, in Chapter 7. Sam doesn't need it yet.

Human-in-the-loop: A design where automation handles the routine work and people handle exceptions and approvals. Lisa reviewing flagged POs is human-in-the-loop. It's the right approach for most business automation.

IDP (intelligent document processing): AI that reads documents such as invoices, purchase orders and contracts, and turns them into structured data. It's the part of Sam's PO system that reads the PDFs.

Key-person risk: The risk that the business depends on something only one person knows. Golden Dragon's "Dark means Amber" rule was key-person risk until it went into the customer table.

Managed Automation: DigitalStaff's monthly service after a build: hosting, monitoring that alerts around the clock, a person who responds within the plan's response time (MapleCo's is the same busi-

ness day), fixes, and retuning when something changes, like a customer's PO layout. The client still makes the business calls.

Parallel run: Running a new system alongside the old manual process on the same real work, and comparing the results, before trusting the new system on its own. MapleCo ran one for a week.

Payment matching: Matching each deposit in the bank to the open invoices it pays, including wires that cover several invoices, bank fees and exchange-rate differences. It's one part of a bank reconciliation, not the whole thing. It's what Lisa's columns M through Q did, and what Phase 2 automated.

Process mining: Using your actual system logs to see how your processes really work, as opposed to how you think they work. The digital equivalent of Oscar watching Lisa for a morning.

RPA (robotic process automation): A form of automation that works through a program's screens, clicking and typing the way a person would. It's for systems without a usable API or integration, like a supplier's web portal. Where a supported API exists, use that instead.

Shadow AI: When employees use AI tools the organization hasn't approved, like personal ChatGPT accounts, for work. It's what happened with Henderson's data in Chapter 6. There's a good chance it's happening at your company too.

Single source of truth: One agreed place for a piece of information, like a price, that everything else reads from. MapleCo's price database in Chapter 6 is one, with the rule that no price exists until it's in there.

Appendix F: Platform Quick Reference

A snapshot of common business platforms and the tasks people typically automate around them. It isn't exhaustive, and what you can connect depends on the product, edition and plan you have. It's a starting point for thinking about your stack.

Platform	What it is	Typical tasks to automate
QuickBooks Online	Accounting	Posting invoices and bills, matching payments, syncing customers and items, reporting. Its standard accounting API doesn't handle sales orders.
Sage 300 CRE	Construction accounting	Subcontractor invoice entry, job cost updates, AP approvals. Integration options depend on version and hosting.
NetSuite	ERP	Quote-to-cash steps, vendor bills, payment matching, multi-entity reporting
Salesforce	CRM	Lead routing, opportunity updates, quote generation, syncing accounts to accounting. API access depends on edition.
HubSpot	CRM and marketing	Contact enrichment, lead scoring, pipeline updates, syncing deals to other systems
Xero	Accounting	Bill and invoice entry, bank rules, expense coding

Platform	What it is	Typical tasks to automate
Fishbowl / Cin7	Inventory for distributors	Sales order to pick slip, lot tracking, low-stock alerts, multi-channel inventory sync
Yardi	Property management	Data extraction, investor reporting, make-ready workflows. Access depends on modules and licensing.
PCLaw	Legal practice management	Time entry, billing, client intake. Desktop installs may need screen automation.
Power BI	Business intelligence	Scheduled data refreshes, report distribution
Zapier / Make	Integration platforms	Connecting cloud apps with triggers and multi-step workflows, with error handling if someone designs it in
UiPath	Automation platform	Screen automation for systems without a usable API, document processing, orchestration
Power Automate	Microsoft workflow	Email routing, approvals, SharePoint and Microsoft 365 workflows, desktop screen automation

The rule of thumb: If your platform has a supported API or a native integration, use it. What it allows varies by product, edition and plan, so check before you plan around it. If there's no usable API, as with some older desktop systems and supplier portals, RPA can work through the screen the way a person would. It breaks more easily when the screens change, so it's the fallback, not the first choice.

A BUSINESS PARABLE

Stop Being the Glue

Sam owns a $15 million maple syrup company in Woodstock, Ontario. Revenue is up. She works sixty-hour weeks, her biggest customer is one bad quarter from walking, and the rules her business runs on live in one employee's head.

She hires. She buys software. She has her IT guy wire up a quick fix that goes off at 2 AM. Then she tries something slower: finding out what her business actually does, step by step.

For owners of businesses doing $5 million to $50 million a year, where you and one or two key people are the glue between systems that don't talk to each other.

Oscar ONeill

DIGITALSTAFF.CA