

A BUSINESS PARABLE

The Business Owner's Playbook for AI & Automation

*How to Stop Being the Glue
Holding Your Business Together*

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About the Author

Most people discover automation at work. Someone shows them an Excel macro or they stumble across Zapier.

I discovered it in a dungeon full of scorpions.

When I was 12, I was obsessed with a game called RuneScape, a medieval fantasy world where you mine rocks for iron ore and sell it for gold. The problem? Mining is boring. You click a rock. You wait. You click again. Your inventory fills up, you walk to the bank, deposit everything, and do it all over again. Forever.

I wanted the gold, but I did not want to click rocks for three hours after school every day. So I found a bot online, installed it on the family computer at 10 PM, and went to bed. When I woke up, I had thousands of ore in my bank and millions of gold pieces. I felt like a criminal mastermind. I was 12, and I had just automated my first process.

Years later, I built my own bot using UiPath, a professional automation platform that normally handles invoice processing and data entry, and pointed it at RuneScape scorpions. It could fight, heal, catch fish, cook the fish, and go back to fighting. On a loop. Indefinitely.

I got banned. A game moderator wandered into the dungeon, tried to talk to me, and my bot just kept fighting scorpions. Then it got stuck in a corner like a mannequin in medieval armor. Ban hammer: activated.

I haven't built a RuneScape bot since. But the skills I used? Those went somewhere much more productive.

Today I run DigitalStaff, a business automation agency based in London, Ontario. We've spent seven years building custom AI and automation for over 30 organizations: construction companies, healthcare clinics, distributors, law firms, Indigenous communities, and anyone else who's tired of clicking rocks.

The thing is, what I do now isn't that different from what I was doing at 12. The process my clients describe is always the same: open an email, download an attachment, enter the data into their system, file it, move on to the next one, repeat. Same structure. Same repetition. Same waste of human time.

The difference is the stakes. And the fact that nobody bans you for automating your accounts payable.

This book is the guide I wish someone had handed me, and the guide I wish I could hand every business owner who calls me exhausted, overwhelmed, and convinced that "maybe we just need to hire another person."

You don't need another person. You need to stop being the glue.

* * *

Who This Book Is For

You run a business. Maybe you started it. Maybe you inherited it. Maybe you were promoted into running it and some days you wish you hadn't been.

Your company does somewhere between \$2 million and \$50 million in revenue. You have 5 to 50 employees. The business has grown, maybe doubled or tripled in the last few years, and that growth is both the best thing that's happened to you and the thing that's slowly killing you.

You've heard about AI. You've probably played with ChatGPT. Someone on your team definitely has. You know your processes are inefficient, but you don't know where to start fixing them, and frankly, you don't have the time to figure it out because you're too busy doing the manual work that the fixing is supposed to eliminate.

You're pragmatic. You're allergic to buzzwords. When someone says "digital transformation" your eyes glaze over. You don't want a pitch. You want someone to show you, specifically, what this looks like for a business like yours.

This book follows Sam, the owner of a Canadian maple syrup company, as she goes from drowning in manual work to running a business that actually runs without her being involved in every single decision. Along the way, she makes every mistake I've seen business owners make: hiring to solve a process problem, buying shiny technology that doesn't fit, duct-taping

together automations that blow up at 2 AM. And eventually, she finds a better way.

Her story is a composite of dozens of real clients I've worked with. The details are maple syrup. The lessons are universal.

If you've ever thought "there has to be a better way to do this," this book is for you.

* * *

CHAPTER 1

Monday Morning

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 supplier portal where she coordinates orders with her producers in Quebec. Tab four:

a Google Sheet that tracks order status, received, ordered from supplier, 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 supplier portal, types in the order, 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, and then does it all again for the next order.

She does this forty to sixty times a week. Personally. Because she doesn't trust anyone else to get Henderson's pricing right.

The order desk does it too. Between them, the team spends roughly 25 hours a week on data entry, copying numbers from one screen and typing them into another screen. Not analyzing. Not strategizing. Not building relationships with buyers. Just moving data that already exists in one system into another system that refuses to talk to the first one.

Sam didn't build Maple Syrup Co. She inherited it, in a sense. MapleCo was founded in 1978 as a practical Quebec packing and distribution operation. By the time Sam came aboard as owner twelve years ago, it was a respected independent supplier with a national reputation, around 45 employees, and roughly \$50 million in annual revenue selling branded, private-label, and foodservice maple products across Canada and the US. It had grown through grit, relationships, and a simple promise: commercial-scale maple with human-scale service.

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, five hundred 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 \$10 million is now held together with duct tape and institutional knowledge at \$50 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 shipping cost increases. She knows that Mrs. Chen at Golden Dragon Restaurant Supply always orders Grade A Dark but actually prefers Grade A Amber and just doesn't know the difference. 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 from PDF purchase orders into QuickBooks. Line by line. Field by field. Every single order.

She's not doing this because she's bad at her job. She's doing this because the systems around her were never set up to do it any other way. 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.

Lisa is too valuable to lose. She's also too valuable to waste.

* * *

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. This is an important distinction that most consultants fail to make.

* * *

Here's what Sam's week looks like.

Monday: Process weekend purchase orders. Chase tracking numbers for Friday's shipments. Reconcile last week's payments against invoices. Realize two payments don't match because someone typed the wrong invoice number. Spend an hour finding the discrepancy.

Tuesday: Send out this week's supplier orders. Manually re-enter every line item from the customer POs into the supplier's web portal. Follow up on three late shipments by calling the carrier. Update the spreadsheet.

Wednesday: Process more POs. Create invoices in QuickBooks for everything that shipped. Manually email each invoice to each customer. Realize one invoice went out with last month's pricing because the price sheet update never made it from the Google Sheet to QuickBooks.

Thursday: Customer calls. Wrong grade of syrup shipped. Sam tracks it back through the chain: the PO said Grade A Amber, someone entered Grade A Dark in the supplier order, the supplier shipped what was ordered, and the customer got the wrong product. Fifteen minutes of data entry error. Two hours of phone calls, a reshipped order, and a credit note to fix.

Friday: Month-end approaches. Lisa starts the bank reconciliation, matching every payment in the bank account to an invoice in QuickBooks. This takes two full days because their biggest customers pay multiple invoices in a single wire transfer with a cryptic reference number. 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."

And underneath all of this, every single day: emails. The shared inbox is a river. Purchase orders mixed with tracking requests mixed with payment confirmations mixed with supplier quotes mixed with spam. The order desk triages it manually. They do their best. Things still fall through the cracks.

Sam works sixty hours a week. Lisa works close to fifty. They're not lazy. They're not bad at their jobs. They're running a \$50 million business on

systems that were designed for a \$10 million business, and the gap between those two things is eating them alive.

* * *

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 watched TV.

But here's the part Sam won't say out loud, not yet: some small, stubborn part of her needs it to be this way. If the business falls apart without her, that means she matters. That means she's essential. That means the thing she built (or inherited, or grew, or held together with her bare hands for twelve years) is real and important and hers.

She confuses being essential with being effective. It's the survival rule that built the company. And it's the same rule that's now choking it.

* * *

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 drives 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 at the warehouse when she arrives. He watches her pull pallets and says nothing for a while. Then: "This is the third time this quarter, Sam."

"I know."

"I flagged it both times before. Sent emails."

"I know, Ray."

"Emails that nobody answered because the inbox is where information goes to be forgotten."

Sam doesn't have a response to that, because Ray is right. She loads the courier van and drives home.

She doesn't have to do any of this personally. She does it because she gives a damn. Because she knows that MapleCo's reputation was built on relationships like this one, and every time the systems fail, it's those relationships that take the hit.

On the drive home, she does the math. The wrong-grade error wasn't a mystery. She traced it in five minutes: the PO said Amber, but when the order was entered into the supplier system, someone typed Dark. A typo.

One field, one letter different, one distracted moment in the middle of entering the twentieth order that afternoon.

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. The error was caused by a human being asked to manually retype data from one screen into another screen, for the twentieth time that day, while also answering the phone and sorting the shared inbox.

This isn't a people failure. It's a system failure.

Sam pulls into her driveway at 8:30 PM. Her daughter's hockey practice ended an hour ago. Her husband 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 nods. She 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 blinks.

"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 not a growth problem. That's a process problem."

Sam nods again, but this time something snags. She doesn't respond. She writes it down in her notebook, and they move on to tax planning.

She doesn't realize it yet, but Gerald just told her the theme of the next six months of her life.

* * *

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, reconciling payments, and fixing errors. That's 25 hours a week, more than 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.

* * *

The fix starts with asking a different question. Not "What technology should we buy?" but "What problem are we actually trying to solve?"

* * *

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. This isn't a phone call. It's a document. It's data. 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 forty-seven purchase orders in the shared inbox and no time to think about anything.

A week later, Sam does what every overwhelmed business owner does.

She hires someone.

His name is Jordan. He's 26, sharp, genuinely eager, and desperate to prove himself. He came 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. But he's the kind of person who, once he's in something, wants to make it better. "Good with computers," Lisa said when she recommended him. He starts at \$48,000 a year. Sam's logic is simple: Lisa is drowning, so let's add another pair of hands. More people, more capacity, problem solved.

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.

Here's what actually happened: Sam added a second person to a broken process. Jordan is now doing 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 have eight years of context about 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 now paying \$48,000 a year, plus CPP, EI, benefits, equipment, the three months of training time Lisa spent getting Jordan up to speed, to have two people doing the work that a well-designed system should be doing automatically. All-in, Jordan costs the business about \$65,000 in year one. The error rate didn't drop. The hours didn't drop for Sam. And the Henderson's account is still shaky because the fundamental problem, humans retyping data between disconnected systems, hasn't changed.

Sam doesn't realize this yet. She thinks she just needs to give Jordan more time.

Jordan, for his part, knows something is off. He's not stupid. He can feel himself becoming another cog in a machine that doesn't work, and it's eating at him. He didn't leave a startup to spend his days copy-pasting between browser tabs. He came here to matter.

* * *

Two months after hiring Jordan, Sam makes her second mistake.

She attends a virtual demo.

A software company, let's call them CloudSyncPro, reaches out with a polished email about their "AI-powered supply chain platform." The demo is impressive. Slick interface, animated dashboards, a salesperson who uses the word "seamless" eleven times in forty minutes. The platform promises to connect her ordering, inventory, shipping, and invoicing into a single unified system.

Sam is hopeful. This feels like the answer. Something purpose-built for exactly her problem.

CloudSyncPro costs \$2,500 a month. That's \$30,000 a year. Sam signs the contract.

Six months later, the platform is shelfware.

Here's what went wrong: 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 handle the specific way Henderson's sends POs, as PDF attachments with a cover sheet that has to be ignored. It doesn't connect natively to QuickBooks Online, only QuickBooks Enterprise, which is a different product. The "integration" they promised required a \$15,000 custom setup fee that wasn't in the original quote.

Buying a giant bottling line for a sugar shack doesn't make you a bigger operation. It just makes you a sugar shack with expensive equipment gathering dust.

Sam asked "Should we use this AI platform?" when she should have asked "What specific problem am I trying to solve, and what's the simplest way to solve it?"

The technology wasn't the problem. The question was.

Ray, when he heard about CloudSyncPro, had offered his assessment in six words: "So it's another thing that doesn't." He was not invited to the next software review meeting. He was, as it turned out, completely correct.

* * *

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

Jordan, remember, the one who's "good with computers," comes to Sam with an idea. He's been playing with Zapier and ChatGPT on his own time, and he thinks he can automate the purchase order email responses.

"Look," he says, pulling up his laptop. "When a PO comes into the shared inbox, this Zapier zap detects the email, sends the PDF to ChatGPT to

extract the order details, and then automatically sends a confirmation email back to the customer. I tested it with ten emails. It works."

Sam is impressed. This is initiative. This is exactly the kind of thing she hired Jordan to do. And Jordan is practically vibrating with the need for this to be the thing that proves he was worth hiring.

"Ship it," she says.

Jordan 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. Estimated ship date: Friday."

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.

On a Sunday night at 2:14 AM, the carrier API that Zapier pings to estimate shipping dates goes down for maintenance. Zapier retries the failed step. The retry triggers the entire workflow from the start. For every PO that came in over the weekend, the confirmation email gets sent again. And again. And again.

Monday morning, Sam opens her inbox to find 47 emails from confused and angry customers who each received between three and eight identical confirmation emails overnight. Henderson's procurement manager, the one who gave Sam the 90-day ultimatum, has forwarded the emails to his VP with a note that Sam will never see but can imagine.

Jordan is devastated. He didn't know about retry logic. He didn't know automations need error handling. He didn't know that what works on ten test emails can detonate spectacularly on two hundred real ones. He sits at his

desk looking like someone who just accidentally set fire to the very building he was trying to improve.

And here's the part that nobody talks about: while Jordan scrambles to turn off the Zapier zap and Sam sends individual apology emails to her biggest customers, Lisa discovers something else. She looks at Jordan's ChatGPT history and sees that for weeks, he's been pasting actual customer purchase orders, complete with company names, contact information, order quantities, and pricing, into ChatGPT to test his extraction prompts.

Customer data. In a public AI tool. With no policy, no guidelines, and no one who thought to ask whether that was okay.

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 Jordan is allowed to paste into the internet."

Sam doesn't even know what a data processing agreement is yet. She will.

* * *

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

She adds up the damage.

Jordan's salary and onboarding: \$65,000 and counting. The CloudSyncPro license she's still paying for: \$30,000 a year. The courier she paid out of pocket for the Mrs. Chen reshipping: \$180. The customer credits she'll have to issue for the email fiasco: maybe \$2,000. The time she and Lisa spent cleaning up the mess: at least 20 hours between them.

But the real cost isn't in dollars. It's in trust. Henderson's is quieter than usual. Mrs. Chen hasn't placed an order this month. And Sam, who built

MapleCo's reputation on personal relationships and reliability, feels like she's watching both erode.

She tried hiring. It didn't fix the process.

She tried buying technology. It didn't fit the business.

She tried building it herself with duct tape and AI. It blew up at 2 AM on a Sunday.

Three swings. Three misses. All of them reasonable decisions made by a smart person, and all of them wrong because they started from the wrong place.

Sam didn't start by understanding her actual problem. She started by grabbing the nearest thing that floated. When you're drowning, you don't analyze the current. You just grab.

* * *

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 clicks it. She reads a blog post by some guy named Oscar who apparently built his first automation bot in a video game when he was 12 and got banned for it.

Despite herself, she laughs. She reads another post. Then another.

At 11 PM, because this is apparently the only time Sam has to herself, she fills out a contact form on the DigitalStaff website. 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 blinks. That's actually a good question.

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. She's expecting buzzwords. She's expecting "AI-powered solutions" and "digital transformation" and "seamless integration."

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

Sam blinks. And then she talks. For forty-five minutes, she talks. About Lisa, about Jordan, 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 bank reconciliation 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. Everyone who tried to help you so far, the new hire, the software vendor, even Jordan with his Zapier thing, they all started with a tool and worked backwards to your problem. That's why none of it stuck."

Sam is quiet for a moment. "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.

"That," Oscar says, "is why discovery comes first. Every client tells me their process is simple. Discovery proves them wrong every time. That's not a bad thing. That's the whole point."

* * *

Sam hangs up and sits with a strange feeling she can't name.

Nobody has talked to her about her business like that before. Not the CloudSyncPro salesperson, who talked about features. Not Jordan, who talked about tools. Not even Gerald, who talks about numbers.

Oscar talked about her *process*. The actual, step-by-step, mundane, boring, real-life sequence of things that happen when a purchase order arrives. And he didn't do it to sell her anything. He did it because, and she's starting to understand this, you can't fix what you don't see. And you can't see what you've never been asked to describe.

It sounds so obvious. Sam can't believe she missed it three times.

But here's the thing: almost everyone does.

Oscar's job, Sam is starting to realize, is to help you see clearly first. Then help you build something that actually works.

She picks up her phone and schedules a discovery session.

* * *

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 a framed screenshot of what appears to be a medieval video game character standing in a mine.

"Is that RuneScape?" Sam asks.

"Long story," Oscar says. "Involves scorpions and a permanent ban. I'll tell you sometime."

He gestures to the whiteboard. "I want to try something. You told me on the phone that you tried three things: hiring, buying software, and building your own with 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: Lisa needs to open QuickBooks, navigate to the same screen, copy data from one field to another, and do this across three apps 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."

Oscar nods slowly. "You just described the entire technology landscape in about thirty seconds. Most vendors will take forty minutes to sell you a platform that blurs all three of those together. But they're fundamentally different problems."

He labels them on the board:

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

Problem 2: RPA. Scripts. 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.

"Now here's where most people go wrong," Oscar says. "Which of these three did CloudSyncPro promise to solve?"

Sam thinks. "All of them? They said it would handle everything."

"Right. And which of these three did Jordan's Zapier experiment try to solve?"

"The third one. The AI one. Reading POs and extracting data."

"Was Zapier the right tool for that?"

Sam is quiet. "No. Zapier is... Problem 1 stuff. Triggers and rules. Jordan bolted ChatGPT onto it to try to handle Problem 3, but the connection between them had no error handling, no monitoring, no..."

She trails off. She can see it now.

"Jordan used the right brain but the wrong body," Oscar says. "ChatGPT can read a PO. But Zapier couldn't hold the whole thing together reliably. And nobody built the part in between."

Sam stares at the whiteboard. 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 Jordan's experiment?"

"Was like asking the grader to also connect the tubing and run the evaporator and do quality control, all at once, with no one watching."

Oscar caps the marker. "Most businesses I work with find that 70 to 80 percent of their pain points are Problem 1. Simple automations. Rules and triggers. AI is the right answer maybe 10 percent of the time. But when it is, it's a game-changer. The trick is matching the tool to the problem, not buying the biggest tool and hoping it fits everything."

Sam does the math. "So for most of my problems, we're talking about the cheap end of the spectrum?"

"For most of your problems, yeah. Your monthly bank reconciliation? That's mostly rule-following with some pattern matching, 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. That's a \$200 automation."

"I've been paying Lisa to do that manually for three years."

"I know."

* * *

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

"Can I ask you something?" Sam says. "Jordan's been using ChatGPT for months. I use it sometimes too. Doesn't that count as having AI in the business?"

Oscar sits down. "It counts as having a smart coworker you can ask questions. It doesn't count as having AI in your business."

He explains: when you open ChatGPT and type a question, you're using an AI assistant. You ask, it answers, you decide what to do with the answer.

You're still the one copying, pasting, making decisions, and taking action. You're still the bottleneck.

An AI system is different. An AI system runs on its own. It reads incoming purchase orders, extracts the line items, checks your inventory, creates a sales order in QuickBooks, and sends a confirmation to the customer. All without you touching it. You see the exceptions. You make the judgment calls. The system handles everything else.

"Using ChatGPT at your desk," Oscar says, "is like having a brilliant intern who you have to supervise every single minute. Building an AI system is like having an employee who handles an entire workflow and only comes to you when something is weird."

"Both are valuable. They're not the same thing."

Sam thinks about all the times she's asked ChatGPT to help her draft an email or summarize a report. It was useful. But nothing changed. She still did the same work the next day.

"So ChatGPT was never going to fix my PO problem," she says.

"Not by itself. ChatGPT is the brain. What you need is the brain plus the hands plus the eyes plus the memory, all wired together. That's a system."

* * *

"Okay," Sam says. "So I need to understand what AI actually can and can't do. Because honestly, half the stuff I read online makes it sound like magic, and the other half makes it sound like it's going to replace all my employees."

Oscar laughs. "It's neither. Here's the short version: AI is great at reading messy documents, classifying things, and summarizing. It's bad at being

right 100% of the time, remembering anything between conversations, and keeping secrets."

"Keeping secrets?"

"If your team is pasting customer data into ChatGPT, that data is going to OpenAI's servers. We'll talk about governance later, but this matters."

Sam thinks about Jordan. She pushes the thought aside.

"The most important thing AI can't do," Oscar says, "is understand context it hasn't been given. AI doesn't know that Mrs. Chen prefers Amber even though she orders Dark. It doesn't know that Henderson's PO format changed last quarter. That context lives in Lisa's head, and if you don't teach it to the system, the system won't know."

"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. Not the judgment. Not the relationships. Not the 'I know this customer is about to have a problem because their order pattern just changed.' That's still human work."

Sam is scribbling notes. This is the first time anyone has explained this to her without either overselling it or dismissing it.

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 their Q3 order history by grade, by distribution center, 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 and looks at Oscar. He hasn't said anything. He's just watching.

"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."

Oscar nods. "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."

Oscar writes nothing. He doesn't need to. Sam just heard herself say it.

* * *

"So the version my team is using, just ChatGPT, on their own, pasting stuff in, that's like having a powerful engine with no car around it."

"That's exactly what it is. The engine is impressive. But without the chassis, the steering, and the brakes, it's just noise and heat."

* * *

Oscar tells Sam one more thing before she leaves.

"Everything you tried taught you something. The hire, the software, the Zapier experiment — each one failed for a different reason, and together they tell you exactly where the real problem is."

He pauses.

"And that is what we're going to do next. We're going to look at your business, really look at it, and figure out where you actually stand."

Sam drives home with something she hasn't felt in months.

Not confidence. Not excitement. Something more useful than both.

Clarity.

* * *

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 she doesn't have a specific agenda. She just wants to see the operation. She's not sure why.

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

"See this?" He points to a small screen mounted near the mainline. "Every tap is on a sensor. If a line drops pressure, 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, Marc'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 Ontario in silence. She doesn't listen to the radio. She doesn't make phone calls.

She keeps thinking about Marc'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. Sam will later learn that Oscar always starts discoveries this way. Laptops create distance. Notebooks create conversation.

"I want to watch," he says. "Not the process you'd describe if I asked you. The process that actually happens. 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 is quiet for a moment. 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, and something shifts. 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 September 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. Sam can't see it, but what he wrote is: *Three sources of truth for pricing. None of them agree. The spreadsheet is not the issue. The fact that it has become a personality is the issue.*

* * *

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 Jordan asking where to find the exchange rate for today), 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. Something in his expression shifts from dismissal to cautious interest. "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 forty to sixty orders a week," Oscar says.

Sam does the math in her head. At 15 minutes per PO, and 50 POs per week, that's 12.5 hours. Just for initial entry. Not counting tracking, invoicing, reconciliation, or any of the dozen other manual steps that follow.

He circles steps 7 through 11. "This is where errors happen. Not because Lisa makes mistakes. Because 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.

"You don't have one workflow," Oscar says quietly. "You have six workflows in a trench coat pretending to be one."

Lisa hasn't said anything since Oscar started drawing. She's been watching him reduce her entire day to fifteen lines on a whiteboard. Each step clean and numbered and obvious. She's spent eight years learning to do this fast, to do it right, to be the person the business can't run without. And now a man with a notebook has turned it into a diagram that looks like it was designed to be handed to a machine.

She doesn't say anything to Sam. She goes to lunch, sits in her car for ten minutes, and comes back. She processes the next PO. But something has shifted, and she doesn't have a name for it yet.

* * *

Oscar flips to a new section of the whiteboard.

"I need to show you something that's going to be uncomfortable."

He draws five boxes in a row, like steps on a staircase.

Stage 1: Manual. Everything done by hand. Spreadsheets, email, paper. This is where MapleCo was fifteen years ago.

Stage 2: Tool-Assisted. You have software, QuickBooks, maybe a CRM, but humans do all the connecting work between systems. "This is where you are right now. You have tools, but you're the glue."

Stage 3: Semi-Automated. Some workflows are automated, but you still need to kick things off or handle exceptions manually. "This is where most of my clients want to get to first."

Stage 4: Systematized. Core processes run on their own. Humans handle exceptions and strategy. "This is where the magic happens. Not because of the technology, because the business owner stops being the bottleneck."

Stage 5: Optimized. The system learns and improves. Process mining, predictive analytics, continuous optimization. "This is where large enterprises are. You don't need to worry about this yet."

"Where do you think MapleCo is?" Oscar asks.

Sam considers. She has QuickBooks. She has a Google Sheet tracker. She has a carrier website. She has a supplier portal. She has software. 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."

Oscar puts down the marker. "That's the answer I get from almost every business owner. And it's almost always wrong by at least one stage."

"What do you mean?"

"Having software isn't the same as being tool-assisted. Being tool-assisted means the tools are actually helping. Your tools are creating work. 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. She wants to say that's not fair, that they have systems, that they're not some paper-and-fax operation.

But she thinks about the six browser tabs. She thinks about the three price lists that don't agree. She thinks about Marc's sugar shack in Quebec, where three people run twelve thousand taps because the monitoring system actually works. And she thinks about her own business, where forty-five people run five hundred orders a week and she still can't take a vacation.

"Stage 2," she says quietly. "Early Stage 2."

"That's right. And there's no shame in that. The shame would be thinking you're at Stage 3 and building for Stage 3 when you're really at Stage 2. That's how you end up spending \$30,000 on software that doesn't fit."

He taps Stage 3. "This is where we're going. Semi-automated. Your highest-pain processes run with minimal human involvement. Lisa goes from data entry to exception management. You go from firefighting to approving."

* * *

"The next step," Oscar says, "is documenting exactly how your business actually works. Not the version on your website. Not the version you'd describe at a networking event. The real one."

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 here's what I've learned from doing this with thirty-plus organizations: every single client tells me their processes are simple. 'Oh, it's straightforward. We get an order, we process it, we ship it.' Then we start mapping it, and it's never simple. There are always exceptions, workarounds, judgment calls, 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.

Sam is quiet for a moment. "You're saying Lisa's workarounds are actually the process documentation."

"Lisa's workarounds ARE the business. Everything else is just 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. Every contractor who's ever disappointed you built the clean version. I want to build the one that actually works for the way you actually work."

* * *

Three days later, Sam calls Oscar.

She's not calling to chat. She's frustrated. Henderson's Q3 report took Lisa two and a half days. Jordan processed a batch of POs with three errors because he was rushing. A supplier in Quebec missed a shipment 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. I've answered more questions in the last two weeks than I answered in my entire due diligence when I took over MapleCo. When does the fixing start?"

There's a pause. When Oscar speaks, his voice is calm but direct.

"What would you like me to fix first?"

"The PO processing. Obviously."

"OK. Which customers send POs as PDFs? Which send them as inline email text? Which send them by fax?"

"I... Lisa would know that."

"What's the most common exception type? Pricing mismatch, unknown product code, or format the system can't read?"

"I don't know."

"If the system encounters a PO with a product code it doesn't recognize, should it reject the order, flag it for review, or try to match it against similar codes?"

Sam is quiet.

"That's why we're still asking questions. You want me to build the right thing. The right thing requires knowing the answers to about two hundred questions like those. Every contractor who disappointed you skipped this

part. They built the clean version. The obvious version. And it broke the first time it encountered something that wasn't obvious."

Sam's jaw tightens. She knows he's right. She hates that he's right. She hates that being right means another week of questions before anything changes.

"How much longer?" she asks.

"We're close. One more meeting with Lisa, and I'll have what I need to start building."

Sam hangs up. She calls Gerald.

"Your automation guy is driving me crazy. All he does is ask questions."

"Is he wrong?" Gerald says.

Sam doesn't answer. Because he's not.

* * *

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 that one supplier requires orders placed before noon EST to ship same-day. She knows that the Golden grade has a longer lead time than Amber or Dark.

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

They map out invoicing next. Then the bank reconciliation. 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."

They both sit with that for a moment. Sam makes a mental note.

* * *

The next day, Sam sends Oscar a photo of the three legal pads.

Oscar replies: "This is perfect. This is exactly what I need. Most people send me a three-bullet summary. You sent me the truth."

Then he adds: "By the way, that thing you said about Lisa and the bus? That's not just a risk management problem. That's actually the strongest argument for automation I can make."

"How so?"

"When you automate a process, you're not just saving time. You're extracting institutional knowledge from people's heads and encoding it into a system. Every rule Lisa follows, every judgment call she makes, every workaround she's invented, we capture that. We make it visible. We make it repeatable. If Lisa goes on vacation, gets sick, or, god forbid, decides to leave, the system doesn't forget."

Sam thinks about this for a long time.

"So it's not about replacing Lisa."

"It never is. It's about making sure the business doesn't depend on any single person's memory. Including yours."

Especially hers.

* * *

And once you see clearly, you're ready for your first win.

* * *

CHAPTER 5

The First Win

Oscar studies Sam's legal pads for three days. Then he calls her.

"I want to start with purchase order processing," he says. "Not because it's the biggest problem. Your bank reconciliation 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.

That extracted data gets matched against MapleCo's customer database and price list. If everything checks out, known customer, valid products, correct

pricing, the system creates a draft sales order in QuickBooks and a corresponding supplier order for the Quebec producers.

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 catalog 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."

Sam is quiet for a moment. "How long does this take to set up?"

"Four to six weeks for the full build. First two weeks are discovery and design, which we've mostly done. Next two weeks are building and testing. Final one to two weeks are running it alongside Lisa's manual process to make sure nothing's missed."

"And the cost?"

"Thirty-five thousand," Oscar says. "That covers discovery, the AI extraction engine, the QuickBooks integration, testing, and three months of support after go-live."

Sam does the math. Jordan cost \$65,000 in year one and didn't fix the process. CloudSyncPro cost \$30,000 and sat on a shelf. This costs less than either. It doesn't call in sick, doesn't need training, and processes orders at 3 AM without complaint.

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

"For now, yes. Eventually, for routine orders from known customers with standard pricing, the system can process them straight through and Lisa only sees exceptions. But we start with full review. Trust is earned, not assumed."

Sam thinks about the Zapier disaster. Trust is earned.

"Do it," she says.

* * *

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?"

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.

During the second week, Jordan makes a suggestion. He's been watching the edge case mapping and he has an idea.

"Why don't we just have the system reject anything it can't parse perfectly? We can handle the weird ones manually for now and train the system on them later. That way we launch faster."

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

"I don't know. Five percent? Ten?"

"It's closer to twenty. And those twenty percent include every Henderson's PO, because Henderson's includes a cover sheet that the system has to learn to skip. They include every PO from the Niagara restaurants, because half of them still fax. They include every new customer, because the system won't recognize the format. You want to manually handle twenty percent of our orders so you can launch a week earlier?"

Jordan's face reddens. "I'm just saying we don't have to be perfect on day one."

"We don't. But we have to be correct for Henderson's on day one. Because Henderson's is thirty percent of our revenue and they just sent us a scorecard that says we're below threshold on accuracy. If the new system bounces their POs into a 'handle manually' pile, we haven't solved anything. We've just given the problem a new address."

The room is quiet. Oscar doesn't intervene. He lets it sit.

Jordan looks at Lisa for a long moment. Then he nods. "OK. Show me the Henderson's cover sheet thing. I want to understand the format."

It's not a resolution. It's the beginning of one.

Lisa, who has been quietly observing Oscar's process with the cautious respect of someone who's seen her workflows described by outsiders before (always incorrectly), says to Sam later: "He's the first one who's bothered to ask how I actually do it, instead of telling me how I should be doing it."

Though even Oscar gets it wrong once.

During the second week of the build, 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 stares at 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 crosses out two lines in his notebook and rewrites them. "This is why I don't build from documentation alone. The documentation is always version one. The person is version twelve."

Lisa almost smiles. Almost.

Oscar also spends an afternoon in the warehouse with Ray. He doesn't bring a laptop. He brings a notebook and a coffee and sits on a folding chair near the shipping desk for three hours. Ray, despite himself, starts talking.

"The packing slips don't always match the sales orders," Ray says at one point. "So I check against both. And sometimes neither one is right, because someone updated the order after the slip was printed but before I pulled the pallet."

Oscar writes this down. "How often does that happen?"

"Once or twice a week. I've got a system." Ray gestures vaguely at the whiteboard and a binder that looks like it predates email.

"Your system works," Oscar says. "I'm not going to replace it. 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. "After I train it on the three misses, it'll be above ninety-eight. The remaining two percent will always be exceptions, and that's fine. That's what Lisa's for."

He adjusts the system. The second batch runs at 49 out of 50.

* * *

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 a customer-specific pricing table. Tuesday: 12 for 12.

By Friday, the system has processed 53 purchase orders with zero errors. 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. "That's not a knock on you. That's the point."

* * *

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 QuickBooks and the order tracking system, 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 stares at the dashboard and feels something she hasn't felt in a very long time.

Space.

Not free time. She has plenty to do. But mental space. Breathing room. The feeling of arriving at work and not being immediately underwater.

She calls Oscar. "It works."

"I know. I was watching the logs."

"That's a little creepy."

"That's monitoring. We'll talk about that too." He pauses. "Want to see what actually happened while you were sleeping?"

He pulls up the log on his laptop and walks her through it.

"Step one: the system scanned your inbox and found twelve PO attachments. Different formats, different layouts, some with cover sheets. That's the AI part — it reads documents it's never seen before and pulls out every field. Step two: each extracted order gets checked against your customer database and price list. Known customer? Valid product? Correct price? That's not AI, that's just rules. Yes or no. Step three: clean orders go straight to a draft sales order in QuickBooks and a supplier order for Quebec. Anything uncertain goes to Lisa's queue with a plain-English summary of what didn't match. Step four: every action gets recorded. Every decision the system made, every field it extracted, every match it confirmed — logged and traceable. If Henderson's ever asks 'why did you ship this,' you can show them the exact chain. Step five: I get alerts if anything looks off. Processing time spikes, error rates change, a customer's order pattern shifts suddenly."

Sam looks at the log. "The AI part is actually smaller than I thought."

"It usually is. Most of the work is boring validation and routing. The AI just handles the messy front door — reading documents that don't follow rules.

Everything after that is just logic."

* * *

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. Error rate: zero, because every PO is validated against the price list and customer database automatically, with no tired-human-at-3-PM risk.

Lisa has 10 extra hours a week. She's using them to call customers she hasn't spoken to in months, reconcile outstanding invoices that have been sitting in AR for weeks, and, for the first time, analyze 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 is quiet for a moment. Then: "That's the nicest thing you've said to me in eight years." She's joking. Mostly.

Jordan, for his part, has been watching the system closely. He's fascinated by the dashboard, the error handling, the way exceptions get routed. He starts asking Oscar questions. Oscar, who will patiently explain anything to anyone who's genuinely curious, starts teaching Jordan how the monitoring works. Jordan's eyes light up in a way Sam hasn't seen since his first week.

Henderson's hasn't said anything. No complaints. No follow-up emails about tracking numbers. Orders go out correctly and on time. The silence, Sam realizes, is the sound of things working.

Ray notices too, in his own way. The packing slips arriving at the warehouse are suddenly, consistently correct. "Huh," he says to no one in particular, examining a packing slip on a Tuesday afternoon. "Third day in a row nothing's wrong." He sounds almost suspicious, like a man who's been burned too many times to trust a streak.

* * *

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 centers. 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 trusts the system. Just until she's sure it handles the Henderson's cover sheet correctly, the USD pricing, the volume discounts, the specific product codes Henderson's uses that don't exactly match MapleCo's internal catalog.

The system has been processing Henderson's POs perfectly for three weeks. She knows this because she's been comparing her manual entries against the system's output every night. They match. Every time. The system is right and Sam keeps processing them by hand anyway.

She can't stop. That's the part she won't say out loud. The system works and she can't bring herself to let it work. Because if the system handles Henderson's, then Sam isn't needed for Henderson's. And if Sam isn't needed for MapleCo's biggest account, then what, exactly, is Sam needed for?

She doesn't think about it in those terms. She tells herself it's prudent. Due diligence. Protecting the relationship. What she's actually doing is protecting her own role as the indispensable person, the one the business can't run

without, the one who has to check everything because checking everything is who she is.

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.

She enters the standing order: 48 cases Grade A Amber, 24 cases Dark, 12 cases Golden. She cross-references the pricing. She creates the supplier order. She updates the tracker.

She doesn't notice that she typed 24 cases of Golden and 12 cases of Dark. She transposed two numbers. The exact kind of error she's made before. The exact kind of error the automation was built to prevent, because the automation cross-references every line item against the original PO and flags discrepancies.

The order goes to the supplier. The supplier ships 24 cases of Golden and 12 cases of Dark. Henderson's receives the wrong quantities. Their warehouse rejects the shipment because it doesn't match the PO. 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. Sam's manual entry is the one that generated the supplier order, because Sam set the system to defer to manual entries when both exist.

Lisa walks into Sam's office and closes the door.

"The Henderson's standing order went out wrong. Wrong quantities. Dark and Golden were flipped."

Sam's stomach drops. "How?"

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

Sam stares at her screen. 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 doesn't say anything.

"I've spent eight years being the person who catches mistakes. 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 Henderson's PO is still on her screen. The correct version, the one the automation generated at 2:47 AM while Sam was asleep, sits right next to her wrong one.

She stares at both entries for a long time.

Then she deletes her manual override settings. Every single one.

It's the hardest thing she's done since taking over MapleCo. Not because it's complicated. Because it means admitting that the system is more reliable than she is. That the business doesn't need her fingers on every keyboard. That being essential and being effective are not the same thing.

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

She calls Henderson's, explains the error, arranges the correction. She doesn't make excuses. She says it was a manual processing mistake that won't happen again. And for the first time, she means it structurally, not just as a promise.

* * *

This is where Sam makes her next mistake. But it's a different kind of mistake now.

She's shaken by the Henderson's error. She's embarrassed. And embarrassment, in Sam, turns into urgency. She wants to fix everything, fast, to prove that the system works and that she can trust it and that the whole experiment wasn't a waste. The part of her that measures her worth by how many problems she solves simultaneously is screaming *catch up*.

"Oscar," she says on a call, "I want to automate the bank reconciliation 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. The kind of pause Sam will learn to recognize as Oscar choosing his words carefully.

"No."

"No? Why not? I've already wasted weeks by... by doing the Henderson's thing manually. I need to make up the time."

"You don't make up time by going faster. You make up time by not breaking things. The PO automation worked because we spent five weeks doing discovery, mapping edge cases, and running it alongside Lisa before we trusted it. If we rush three more processes at the same time, we'll build something that works on test data and breaks in production."

Sam winces. She remembers the 200 duplicate emails. She remembers the \$30,000 in shelfware. And now she remembers the transposed Golden and Dark cases, the ones she created with her own hands because she couldn't let go.

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

Oscar starts work on the shipping notification automation. It's a simple trigger: when a shipping label is created in the carrier system, the tracking number gets captured and emailed to the customer automatically. It's a \$200-level automation that MapleCo has been paying humans to do manually for years.

It goes live in four days. It works perfectly. Henderson's procurement manager 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.

* * *

But the real trouble is building in the background.

The PO system catches the problems that enter through the front door. It validates data, checks pricing, flags exceptions. What it doesn't do, what no automation can do, is govern how people behave.

Jordan has been using the PO system's success as motivation to experiment more. He's not building Zapier zaps this time. He learned that lesson. Instead, he's been using ChatGPT to build small productivity tools for himself. A prompt that summarizes customer emails. A template that drafts supplier follow-up messages. A script that converts Henderson's CSV remittance files into a format Lisa can reconcile faster.

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

Customer names. Order quantities. Pricing data. Contract terms. Henderson's product mix, which is arguably competitive intelligence. Lisa's bank reconciliation notes, which contain payment amounts and bank account references.

Jordan isn't being malicious. He's being efficient. He's doing exactly what millions of employees are doing right now at companies around the world: taking business data and pasting it into a consumer AI tool because it makes their job easier. He wants to matter. He wants to contribute something real. And this, to him, feels like contribution.

Sam doesn't know this is happening. She has no AI policy. She has no guidelines for what data can and can't be shared with external tools. She doesn't even know the question to ask.

Meanwhile, the Henderson's 90-day clock is still ticking. Sam's been so focused on the PO wins that she forgot the bigger picture. Henderson's wants reliability across the board: orders, shipping, invoicing, communication. Sam has fixed one piece. The rest is still held together with spreadsheets and hope.

And Oscar? Oscar knows all of this is coming. He's seen it at every client. The first win creates confidence. Confidence creates speed. Speed without governance creates the conditions for something to go very wrong.

He hasn't mentioned it yet. Not because he doesn't see it, but because, and this is something Sam will eventually appreciate, Oscar knows that some lessons only land when the student is ready to hear them.

That readiness is about three weeks away.

* * *

CHAPTER 6

The Guardrails

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

It's Henderson's. Not the procurement manager 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 David 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.

David 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 signed 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," David 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 David Kim she'll investigate and call back within 24 hours.

She hangs up. Her hands are shaking.

* * *

Here is what happened.

Jordan, who has been using ChatGPT to build productivity shortcuts for weeks, created a particularly useful tool: a prompt that analyzes Henderson's weekly POs and identifies trends. "They're ordering 15% more Amber this quarter," he'd told Sam proudly. "I think they're prepping for a fall promotion."

The analysis was correct. The problem was how Jordan got it. He had pasted six weeks of Henderson's purchase orders, complete with product codes, volumes, per-unit pricing, and distribution center addresses, into ChatGPT. On the consumer version. With no enterprise agreement. No data processing agreement. No guarantee that the data wouldn't be used to train future models.

Henderson's found out because their own compliance monitoring flagged it. They run periodic checks on supplier data exposure, and Jordan's ChatGPT session, or rather, the patterns it generated, triggered an alert.

Sam doesn't know any of this yet. She only knows that her biggest customer's legal team is on the phone and the words "data handling" and "AI tools" are being used in the same sentence.

* * *

Sam calls Jordan into the boardroom.

"Have you been putting Henderson's data into ChatGPT?"

Jordan goes pale. Not because he was hiding it, because he genuinely didn't think it was a problem. "I was just analyzing their order patterns. I wasn't sending it to anyone. It was just... ChatGPT."

"What exactly did you paste in?"

Jordan pulls up his conversation history. Sam reads the prompts. She sees Henderson's PO numbers, their product-specific pricing (which is under NDA), their distribution center locations, their order volumes going back two months.

Sam's first instinct is anger. Her second instinct, the one that makes her a good leader, is honesty.

This isn't Jordan's fault. Jordan was never told not to do this. There is no AI policy at MapleCo. There are no guidelines about what data can and can't go into which tools. Sam never thought to create one because, until six weeks ago, "AI" wasn't part of how her business operated.

The truth is that employees everywhere are doing exactly what Jordan did: using consumer AI tools with consumer terms of service to handle business data their employers don't know about.

Sam didn't have a shadow AI problem. She had a governance vacuum.

After Sam leaves the boardroom, Jordan sits at his desk and opens his ChatGPT history. He scrolls through weeks of conversations. Henderson's PO numbers. Pricing data. Distribution center addresses. Each one felt like progress when he typed it. Each one now looks like evidence.

He opens a new email. Types "Resignation" in the subject line. Stares at it for ten minutes. Doesn't send it. Closes the tab. Then he starts making a list

of every tool he's used and every dataset he's touched, because if Sam asks — and she will — he wants to have the answer ready.

* * *

Sam calls Oscar.

She expects him to be surprised. He isn't.

"This was going to happen," he says. "Not because Jordan did something wrong. Because you didn't have guardrails. Every company I work with either creates an AI policy before something goes wrong or creates one after. The 'after' version is more expensive."

Sam 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."

"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 in 2026 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 invoice was generated by the new automation system, which pulled prices from the master list. But the master list hadn't been updated to reflect the price increase that Sam communicated verbally to Lisa two weeks ago, which Lisa had been manually overriding in QuickBooks on a per-order basis, which the automation system doesn't know about because nobody told it.

The system did exactly what it was designed to do — it just didn't know what it didn't know.

Sam issues a corrected invoice. The dollar amount is small. But it's the principle: the automation confidently sent out wrong data because the source data was wrong. And nobody caught it because the whole point of automation is that you don't have to check every transaction.

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

The PO automation: brilliant. Transformed her mornings. Freed Lisa. Impressed Henderson's.

Her own manual override: humiliating. She caused the exact error the system was designed to prevent, because she couldn't let go.

The governance gap: dangerous. One employee's well-intentioned ChatGPT use almost cost them their biggest account.

The pricing error: embarrassing. The system did exactly what it was told, and what it was told was wrong.

Sam wonders: *How many of these failures are the system's, 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. "I was wondering when you'd call."

"How did you know?"

"Because this is the part that always happens. The first win feels like the end of the story. It's actually the middle."

* * *

"You had four failures this month," he says. "Can you separate them?"

Sam thinks. "Jordan's ChatGPT thing. That's governance."

"Good. What else?"

"The pricing error. The system used the wrong price list because we have three versions that don't agree. 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 doesn't say anything for a moment. When he does, his voice is different. Softer. "That one's the most important, Sam. The first three are structural. Policy, data, monitoring. Those are problems I can help you build solutions for. The fourth one is about whether you're willing to actually let those solutions work."

"Lisa said something similar. Less diplomatically."

"Lisa's been watching you hold the whole company together with your bare hands for twelve years. She knows what it costs. She also knows you can't keep doing it."

Sam stares at the ceiling.

"Every automation that breaks teaches you something a successful one never could," Oscar says. "And the hardest lesson is that sometimes the bottleneck is the person who built the business. Fixing that one is harder than fixing any system."

Sam doesn't respond. She doesn't need to. He's right, and they both know it.

"So what do I do?"

"You do what you did after every other failure, but smarter. You don't stop. You don't go backwards. You build the guardrails. And this time, you build them around yourself too."

* * *

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

The AI Policy. It's one page. It says: MapleCo employees may use AI tools for internal productivity. No customer data, financial data, or competitive information may be entered into any AI tool without written approval. The approved tool list is maintained by Sam and reviewed quarterly. 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 Jordan. Jordan reads it, nods, and says, "I'm sorry about the Henderson's thing. I really didn't know." Sam believes him. She also gives

him a new job: Jordan is now responsible for maintaining the approved tool list and onboarding the team when new tools are added. His Zapier instincts and ChatGPT curiosity, it turns out, make him the perfect person to own this, as long as there are guardrails.

Oscar adds one more principle. "Your policy covers data. But not every process carries the same risk, and your team needs to know where the line is."

He draws it simply: "Administrative repetition — reading a PO, extracting fields, matching against a database, sending a tracking notification — that's safe to automate with monitoring. The system does the work, a person reviews the exceptions."

"But pricing exceptions, contract-sensitive communication, compliance reporting, anything where a wrong answer damages a customer relationship or creates legal exposure — that stays human-reviewed. The system does the prep. It organizes, flags, summarizes. But a person makes the call."

Sam thinks about Henderson's. "So the PO extraction is on one side of that line. But if Henderson's asks for a custom pricing agreement..."

"A person handles that. Every time. The system can pull the data and draft the comparison, but the decision and the communication stay human. That's not a limitation. That's the design."

Sam adds it to the policy. One paragraph. It takes five minutes. It will save them from a conversation they don't want to have with David Kim again.

The Single Source of Truth. Oscar helps Sam consolidate her pricing into one database that feeds both QuickBooks and the automation system. No more three-way disagreements between the Google Sheet, QuickBooks, and customer-specific side deals. When a price changes, it changes once, in one place, and everything downstream updates automatically.

This is harder than it sounds. It takes a full week. But when it's done, the leaky tubing is sealed.

The Monitoring Layer. Oscar adds automated checks to the PO and invoicing systems. Any invoice total that deviates more than 10 percent from the historical average for that customer gets flagged. Any new customer gets flagged for manual review. Any order with a product code that doesn't match the catalog gets flagged.

Lisa reviews the flags each morning. It takes ten minutes. It catches the things that previously would have slipped through until a customer called to complain.

* * *

Sam calls David Kim at Henderson's.

She tells the truth. An employee, without malicious intent, used a consumer AI tool to analyze Henderson's order data. The employee was not given guidance because MapleCo did not have an AI policy. That has been corrected. Here is the policy. Here are the controls. It will not happen again.

David 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 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, 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 reduces their Q4 order volume by 15% during the probationary period. Not as punishment, David 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 the probationary status means every interaction for the next three months carries extra weight. She can't afford a single mistake.

It's not the worst outcome. But it's not the clean save she hoped for.

The 90-day clock hasn't reset. It's been replaced by a different 90-day clock. This one has paperwork.

* * *

That weekend, Sam sits on the bleachers at her daughter's hockey practice.

She doesn't bring her laptop. She doesn't check her phone every five minutes. She watches the kids skate and she thinks about the last three months.

She thinks about the last three months. Every mistake she made was reasonable. Every mistake was wrong. And the hardest lesson wasn't about technology or process or governance. It was about herself.

That her need to be essential — to personally touch every Henderson's order, to be the one the business couldn't survive without — wasn't strength. It was the thing preventing the business from outgrowing her.

Sam isn't sure she's fully fixed that yet. But she's no longer afraid to try.

Her phone buzzes. It's 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.

* * *

CHAPTER 7

Ninety Days Later

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. She checks her phone, not with the desperate urgency of someone bracing for disaster, but with the calm curiosity of someone who trusts that the machine kept running overnight.

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.

Bank reconciliation: Yesterday's deposits matched against open invoices. Two items need manual review, a payment from Henderson's that covers four invoices in one wire transfer (the system matched three, flagged the fourth for Lisa).

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.

She gets to the office at 8:30. Not 7:15. Because there is no longer a reason to beat Lisa to the inbox.

* * *

Lisa is already at her desk, but she's not entering data.

She's on a call with a supplier in Quebec, negotiating a better rate on Grade A Amber for next season. She has a spreadsheet open, not the old colour-coded tracking sheet, but a margin analysis she built herself showing which products have the healthiest margins by customer segment. She's been doing this kind of work for six weeks now, and she's discovered something that surprises everyone: the Golden grade, which Sam always thought of as a niche product, has the highest margin per unit and the fastest-growing demand among their restaurant customers.

Lisa has recommended that Sam launch a "Golden Premium" line targeting high-end restaurants. It's the first strategic product recommendation in MapleCo's history that came from data instead of gut feeling.

One afternoon, she says to Sam: "I spent eight years proving I could absorb boring work without complaining. Turns out that's not the same as proving what I'm actually good at."

Sam doesn't have a response. She just nods and makes a note to never let that happen to another employee again.

That Friday, Lisa closes her laptop at 5:15. Not because she's forcing herself to stop. Because she's done. Actually done. She drives home without rehearsing Monday's inbox in her head. She stops for groceries without calculating whether she has time. She makes dinner at a normal hour and doesn't check her phone once.

It's not a celebration. It's just a Friday. But it's the first Friday in years where her weekend starts when she leaves the office, not at midnight on Sunday when she finally stops dreading Monday. The remarkable thing is how unremarkable it feels. That's how she knows something has actually changed.

* * *

Jordan walks in at 8:45 with a coffee and a laptop.

He's different too. After the Henderson's incident, Sam considered letting him go. Oscar talked her out of it.

"Jordan's instinct is right," Oscar had said. "He saw manual work and wanted to automate it. That's exactly the instinct you need. He just didn't have the framework or the guardrails. Give him those, and he'll be the person who makes sure the systems keep running after I step back."

Jordan is now the automation operations coordinator, a title he made up himself, which Sam allowed because it accurately describes what he does. He monitors the dashboards each morning, reviews system logs, maintains the approved tool list, and serves as the first point of contact when something flags an exception that Lisa or Sam needs to see.

He's also become genuinely good at it. Last week, he noticed that the PO extraction system was taking longer than usual to process orders from a particular customer. He investigated, found that the customer had switched to a new PO template, and, instead of rushing a fix, mapped out the three edge cases the new format introduced before retraining the AI model on the new format. He resolved it before anyone else noticed.

Lisa was the one who spotted what he'd done. She pulled up his change log, saw the edge case notes, and walked over to his desk.

"You mapped the exceptions first," she said.

"Yeah. You taught me that."

Lisa didn't say anything else. She just nodded. But Sam, watching from across the room, saw something shift between them. The kid who wanted quick wins and the woman who knew where things break had finally found a language they both spoke.

* * *

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

What Ray has become is quiet. A specific kind of quiet. The quiet of a man who hasn't had to make a phone call about a wrong packing slip in six weeks.

He still has his whiteboard. He still has his binder. But the information arriving at his dock is now consistently correct, which means he's spending less time cross-referencing and more time doing what he actually cares about: logistics. Routing. Making sure the Grade A Amber doesn't sit next to the heating vent.

When Sam asked him what he thought of the new systems, Ray considered the question for a long time.

"The packing slips are right now," he said.

"And?"

"And what? That's the whole thing. The packing slips are right. I don't need a dashboard to tell me that. I can tell because I'm not on the phone yelling about it."

Oscar, when he heard this story, laughed harder than Sam had ever seen him laugh. "That," he said, "is the best testimonial I've ever received."

* * *

The Henderson's account renewed.

The 90-day probation ended without incident. Every compliance report was clean. Every attestation was filed. And somewhere in that process, Henderson's stopped monitoring MapleCo as a risk and started noticing them as a supplier that had quietly become one of their most reliable. They restored the 15% they'd pulled during probation, and the procurement manager mentioned that MapleCo was being considered for their fall 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."

A week later, Henderson's procurement manager emails asking for a product-by-product breakdown and a proposed assortment for the fall promotion — 47 stores, custom mix, regional preferences. He needs it by Friday.

Three months ago, this would have taken Sam and Lisa the better part of a week: pulling data from three spreadsheets that didn't agree, cross-referencing pricing agreements scribbled in email threads, manually building a proposal in a Word document.

Lisa pulls it together in an afternoon. The data is clean because it lives in one place now. She adds her Golden Premium recommendation, backed by the margin analysis she's been running since the system freed her time. MapleCo sends the proposal two days early.

The procurement manager replies the next morning: "You're the first supplier to break out margin contribution from our side. That's actually really helpful. We're sharing this with category management."

The fall promotion still isn't confirmed. But MapleCo is no longer competing on "please don't drop us." For the first time, they're competing on capability — and the capability only exists because Lisa isn't spending her days retyping purchase orders.

Not everything came back. The Niagara restaurant chain that received the wrong-priced invoice during the chaos had already switched to another supplier by the time Sam called to follow up. They were polite about it. They just moved on. Some mistakes leave marks that can't be undone, and Sam is learning to sit with that instead of pretending otherwise.

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

* * *

Oscar comes by the office one last time, not for a project meeting, but for coffee.

Sam's working from the boardroom. The whiteboard that Oscar covered in process maps three months ago 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. "Three months ago, you had six browser tabs and a prayer."

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

"Did you cancel it?"

"Last week. It felt amazing." She pauses. "I added it up, by the way."

She walks to the whiteboard, grabs a marker, and draws two columns. Oscar watches with his coffee.

"Old way," she says, writing. "Jordan: \$65,000. CloudSyncPro: \$30,000 a year. My own time on Henderson's — fifteen hours a week I shouldn't have been spending, for months. Customer credits from the email disaster: \$2,000. The courier for Mrs. Chen: \$180. Henderson's pulling 15% during probation — I don't even want to calculate that one. And Lisa, buried in data entry for eight years when she should have been doing what she's doing now."

She writes the second column. "New way. Your build: \$35,000. Hosting and support: modest. Lisa gets ten hours a week back. I get five. Error rate goes to near-zero. Henderson's renews and grows." She steps back. "The \$35,000 pays for itself every quarter in recovered hours alone. Before you count the errors it prevents or the accounts it protects. The first \$95,000 bought us lessons. The \$35,000 bought us a business that actually runs."

Oscar looks at the whiteboard. "Most of my clients do that math eventually. The ones who do it before the first \$95,000 are the lucky ones."

They sit with their coffee. Oscar asks how many hours Sam is working per week now.

"Forty-five," she says. "Sometimes forty. It's not that the work disappeared. It's that the work I'm doing now is actually my job. Strategic stuff. Customer relationships. Thinking about where we're going, not putting out fires from where we've been."

"And Lisa?"

"She already asked for a raise. I said yes."

Oscar grins. "And Jordan?"

"The kid's got instincts. He just needed structure."

"And Ray?"

Sam pauses. "Ray said the packing slips are right now. That was his entire review."

"That might be my favourite feedback I've ever gotten."

* * *

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. "You already know the pattern. Start with the problem. Start small. Keep humans in the loop. Build guardrails. Invest in your people. You've done all of that. But there's one more thing, and it's the hardest one."

He pauses.

"The owner lets go. You can build perfect 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. The system was right and you overrode it because you couldn't trust something that didn't need you. Every owner I work with hits that wall eventually. The ones who make it through are the ones who realize that building something that works without them isn't a loss. It's the whole point."

Sam is quiet for a moment. Then: "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."

Sam walks him to the door. She doesn't write anything down. She doesn't need to. This one she'll remember.

* * *

That Friday afternoon, Sam leaves the office at 4:30.

She drives to the arena. Her daughter's team is playing their first game of the season. Sam gets there early enough to find a good seat.

The game starts. Sam watches. Her phone is in her pocket, not her hand.

At the end of the first period, she pulls it out. Not because she's anxious. Just a quick check. The dashboard shows a single notification:

Saturday batch preview: 6 POs queued. All validated. Ready for processing.

She reads it. She smiles. She puts the phone away and watches the rest of the game.

After the final whistle, her daughter's team wins 3-1, Sam walks to the parking lot with her arm around her kid, talking about the game, not about invoices.

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

Today, she's the owner again.

* * *

Afterword

Most people discover automation at work. I discovered it in a dungeon full of scorpions.

The specifics of my story, the RuneScape bots, the ban, the career that followed, are mine. But the pattern is universal. Someone sees a repetitive, tedious process and thinks: *there has to be a better way*. The businesses that thrive are the ones where that thought 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.

Start with your problem, not with technology. See your business clearly.
Start small. Build guardrails. Invest in your people.

The rest follows.

* * *

Oscar O'Neill is the founder of DigitalStaff, a business automation agency based in London, Ontario. Over seven years, he's built custom AI and automation solutions for more than 30 organizations across construction, healthcare, distribution, legal, education, non-profit, and Indigenous communities. He still can't play RuneScape.

If Sam's story sounds familiar and you want to talk about what automation could look like for your business, visit digitalstaff.ca or book a free discovery call.

* * *

Appendix A: Your 90-Day Playbook

Sam's journey took about ninety days from the first call with Oscar to a business that runs differently. Yours can follow a similar timeline. Here's how to think about it.

Month 1: See Clearly

Week 1-2: Identify your top three pain points. What processes eat the most hours? Where do errors happen most? What would break if your key person went on vacation for two weeks?

Week 3-4: Document them honestly. Write down every step, the real version, not the pretty version. Who does what? What tools do they use? Where does data move from one system to another through a human? Where are the workarounds?

Ask yourself: Could I take two weeks off without the business losing orders? How many hours per week does my team spend on data entry? How many different systems contain the same information? Do I have an AI policy?

Month 2: Win Small

Week 5-6: Pick one process. The one with the highest impact and the clearest steps. Usually it's something involving document processing, data entry, or moving information between systems.

Week 7-8: Build it right. Whether you hire help or build internally, do discovery first. Map every edge case. Run the automation alongside the manual process before you trust it. Keep humans in the loop.

What "right" looks like: the system handles the routine cases automatically. Exceptions get flagged for a human decision. Every transaction is logged and auditable. Someone is watching for anomalies.

Month 3: Build the Foundation

Week 9-10: Put guardrails in place. Write your AI policy (one page is enough). Consolidate your data sources. Set up monitoring so you know when something's off before your customers do.

Week 11-12: Plan the next phase. Your first automation freed up time. Use that time to assess what's next. Bank reconciliation? Customer onboarding? Reporting? Pick the next highest-impact process and repeat.

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: 15-20 hours per person, per week, redirected from manual work to strategic work.

Error reduction: 90-95% fewer data entry mistakes.

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: Technology Glossary

Automation: A system that follows rules to perform tasks without human intervention. "When this happens, do that." The simplest and cheapest form of the technology. If your process is predictable and repeatable, start here.

RPA (Robotic Process Automation): Software that mimics human actions on a screen: clicking buttons, copying data, navigating between apps. Best for processes that span multiple applications but follow the same steps every time. Think of it as a very obedient, very fast employee who never improvises.

AI (Artificial Intelligence): Software that makes decisions based on patterns learned from data. Unlike automation and RPA, AI handles ambiguity. It can read a document it's never seen before and extract the relevant information. Best for tasks that require reading, interpreting, or classifying.

RAG (Retrieval-Augmented Generation): A technique that makes AI chatbots smarter by letting them search your actual documents before answering. Instead of making things up, a RAG chatbot looks up the answer in your data. This is how most business chatbots should work.

IDP (Intelligent Document Processing): AI that reads documents, invoices, purchase orders, contracts, and extracts structured data from them. This is what processes Sam's PDFs.

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.

Hyperautomation: Combining multiple technologies, automation, RPA, AI, process mining, into integrated systems. This is where companies end up after Stage 3 or 4 of the readiness model. You don't start here.

Human-in-the-Loop: A design pattern where automation handles the routine work and humans handle exceptions and approvals. Lisa reviewing flagged POs is human-in-the-loop. This is the right approach for most business automation.

Shadow AI: When employees use consumer AI tools (like personal ChatGPT accounts) for work without the organization's knowledge or approval. This is what Jordan did. It's happening at your company too.

* * *

Appendix C: Platform Quick Reference

A snapshot of common business platforms and what can be automated with them. This isn't exhaustive. It's a starting point for thinking about your stack.

Platform	What It Does	Common Automations
QuickBooks	Accounting	Invoice creation, payment matching, bank reconciliation, reporting
Sage 300 CRE	Construction accounting	Job costing sync, AP automation, subcontractor invoice entry
NetSuite	ERP	Quote-to-cash workflows, bank reconciliation, multi-entity reporting
Salesforce	CRM	Lead routing, opportunity updates, quote generation, sync to ERP
HubSpot	CRM & Marketing	Contact enrichment, lead scoring, pipeline automation, SQL sync
Xero	Accounting	Invoice processing, bank feeds, expense categorization
Yardi	Property management	Data extraction, investor reporting, make-ready workflows
PCLaw	Legal practice management	Time entry from mobile, client portal access, billing automation
Power BI	Business intelligence	Automated report generation, scheduled dashboard refreshes
Zapier / Make	Integration platforms	Simple triggers between apps, great for lightweight automations
UiPath	RPA platform	Screen-based automation for legacy systems without APIs
Power Automate	Microsoft workflow	Email routing, approval workflows, SharePoint automation

The rule of thumb: If your platform has an API, we can connect it to anything. If it doesn't, legacy systems, old ERPs, applications that only work through a screen, RPA can still automate it by mimicking what a human would do.

* * *

Appendix D: Sam's AI Policy (Template)

This is the one-page AI policy that Sam created for MapleCo. Adapt it for your business.

Maple Syrup Co. (MapleCo) - AI Usage Policy

Purpose: This policy governs how employees use AI tools in the course of their work at MapleCo.

Approved AI Tools:

- [List your approved tools here, e.g., company ChatGPT Enterprise account, specific automation platforms]
- Only tools on this list may be used for work-related tasks
- The approved list is reviewed quarterly by [name/role]

Data Rules:

- **Never input** into any AI tool: customer data, financial data, pricing information, contract terms, employee personal information, or any data covered by an NDA or data processing agreement
- **Acceptable to input:** General business questions, draft writing (with no confidential details), brainstorming, publicly available information

- **When in doubt, ask before pasting.** Contact [name/role] for guidance.

What to Do If You're Not Sure:

1. Stop before pasting
2. Ask yourself: "Would I be comfortable if this data appeared in a public report?"
3. If no, don't paste it. Check with [name/role] first.

Accountability:

- All employees acknowledge this policy in writing
- Violations are not punitive for first-time, good-faith mistakes, but they must be reported
- Repeated violations after training will be addressed through standard HR processes

This policy is effective [date] and will be reviewed quarterly.

* * *

Thank you for reading. Now go build something.