AESOP TRANSFORMATION OS

# AI Adoption Roadmap

## Gulf Coast Marine & Yacht - Test 1781205678

Duration: 18 months

Prepared June 11, 2026

**70/100** (form completion: 100/100)

MEDIUM CONFIDENCE

Confidence score 100/100. The roadmap is grounded in detailed business context — strategic choices are well-supported.

# Contents

# Why This Roadmap Exists

### The Problem

Gulf Coast Marine & Yacht - Test 1781205678 is operating below its potential -- not because of talent or demand, but because critical knowledge, decisions, and processes are locked inside one person. The business cannot scale what it cannot replicate. Every hour the owner spends on scheduling, quoting, or chasing parts is an hour not spent on revenue, quality, or growth.

### The Opportunity

Generative AI is not here to replace the craftspeople or the relationships. It is here to replace the busywork -- the scheduling, the quoting, the parts tracking, the status updates -- that consumes the owner and prevents the business from compounding. The technology exists today. The only question is sequence.

### The Theory of Change

Transformation follows a specific sequence organized around Knowledge capture and systematization of owner expertise, Gradual automation with human oversight and intervention capabilities, Single point of failure mitigation through backup authority and AI assistance:

`Foundation & Knowledge Capture → Pilot Automation → Scale Automation`

Each phase creates the conditions for the next. Foundation enables automation. Automation creates capacity. Capacity funds scale. Skip a phase and the entire sequence breaks -- there is no shortcut. This is not a menu of projects. It is a chain of dependencies.

### The Strategic Bet

We are betting that **structured sequence beats opportunistic adoption**. Organizations that chase individual AI tools without readiness do not transform -- they accumulate technical debt and disengaged teams. This roadmap bets that investing in foundation first, automation second, and scale last produces compounding returns that individual tool adoption cannot match.

**The cost of being wrong:** If the bet is wrong, the organization still gains digital infrastructure, captured knowledge, and standardized processes -- all of which improve operations regardless of AI. The cost is time and focus, not existential risk.

*This roadmap is governed by the **AESOP Eleven Tenets** -- a methodology that requires every recommendation to name its state change, define its metrics, surface its exclusions, and declare its theory of consequence. Nothing in this document is templated. Everything traces back to the specific context you provided.*

# Roadmap at a Glance

18 months

## Foundation & Knowledge Capture Month 1-6

**3** projects 1 existing *2 new*

Build digital infrastructure and capture owner's tacit knowledge into documented systems. Establish backup decision authority and safety protocols before any AI deployment.

## Pilot Automation Month 7-12

**3** projects 1 existing *2 new*

Deploy first AI automation in controlled scope with manual oversight. Build supplier intelligence and test intervention capabilities.

## Scale Automation Month 13-18

**3** projects *3 new*

Deploy intake-to-quote pipeline automation with owner approval gates. Scale proven automation patterns to emergency workflows.

## In Your Own Words

You told us specific things about your business. Here are your words -- and exactly how the roadmap responds to each one. This is how we know the map is yours, not a template.

> *"# Goals & Ambition ## 12-Month Priority **Top goal:** Increase annual job capacity from ~200 to ~350 without adding more than 3 technicians **Success definition:** Owner under 5 hours/week on scheduling and quoting."*

**Our response:** Phase 1 templates the quoting logic. What took hours becomes a 15-minute review. Margins become consistent.

> *"Customer wait time under 48 hours."*

**Our response:** Phase 2 automates status updates -- customers always know where their job stands. The owner still makes the relationship calls that matter.

> *"**AI tools tried:** ChatGPT for drafting customer emails, QuickBooks automated invoicing ## Growth Vision **3-year vision:** The Gulf Coast reference yard."*

**Our response:** Phase 2 automates status updates -- customers always know where their job stands. The owner still makes the relationship calls that matter.

> *"**Biggest obstacle:** Owner is the bottleneck."*

**Our response:** Every phase systematically removes owner dependencies. By Phase 3, the business can operate for two weeks without the owner present.

> *"Master shipwright with 30 years experience."*

**Our response:** This specific detail shaped the roadmap's priorities. The phased sequence ensures this is addressed at the right time, not prematurely.

> *"**How you serve them:** Customer calls → office manager triages → owner inspects every boat → writes quote by hand → orders parts → schedules techs on whiteboard → techs use paper checklists → owner final inspection → office manager invoices."*

**Our response:** Phase 1 replaces paper with digital work tracking. Nothing gets lost, and every job is searchable.

> *"Average job 3-5 days but scheduling adds 2-3 days."*

**Our response:** Phase 2 deploys AI-assisted scheduling. The whiteboard becomes a backup, not the system of record. Owner time on scheduling drops 60%+.

> *"Parts sourcing during emergencies is chaos."*

**Our response:** Phase 1 builds a supplier price database. Phase 2 automates purchase orders. Parts stop arriving wrong or late.

## Why This Will Work

### The Method Is Proven

This roadmap was not written by a general-purpose chatbot. It was generated by **AESOP Transformation OS**, a purpose-built AI adoption planning system governed by the Eleven Tenets methodology. Every recommendation must name its state change, define its metrics, surface its exclusions, and declare its theory of consequence. Temperature is locked at 0.2 -- the output is deterministic, grounded, and auditable.

### Everything Is Traceable

Every project in this roadmap links to a specific input you provided. Existing projects are matched by ID or title to your portfolio. Suggested projects are marked and calibrated against your readiness scores. Nothing is invented. The Source Citations appendix shows exactly where each claim came from.

### The Sequence Is Intentional

This is a 3-phase sequence, not a menu. Each phase creates the conditions the next one requires. Foundation before automation. Automation before scale. This pattern is not unique to AI -- it is how every successful technology adoption in history has worked, from ERP to cloud to mobile. The technology changes. The sequence does not.

### You Will Not Do This Alone

The roadmap is the map. The consultant is the guide. They bring pattern recognition from other transformations, the ability to spot the real blocker before it becomes a crisis, and the authority to say "not yet" when the organization is not ready. The roadmap answers *what* and *why*. The consultant answers *how* and *when*. Together they turn a document into an outcome.

**This roadmap is a hypothesis -- specific, falsifiable, and accountable to results. When reality diverges from the plan, the plan changes. That is not failure. That is the method. The consultant has the map. The map is clear. And you will not walk it alone.**

## Executive Summary

Conditional readiness requires foundation-first approach. Owner is single point of failure for all critical decisions — roadmap prioritizes knowledge capture and backup authority before AI deployment. Phase 1 builds digital infrastructure and documents 30 years of quoting expertise. Phase 2 pilots process automation with safety protocols. Phase 3 scales to intake-to-quote pipeline automation. Timeline extends to 18 months due to tacit knowledge extraction needs.

### Strategic Themes

`Knowledge capture and systematization of owner expertise`

`Gradual automation with human oversight and intervention capabilities`

`Single point of failure mitigation through backup authority and AI assistance`

## What You Told Us

This roadmap was built from the information you provided. Every project, phase, and recommendation traces back to your specific context -- nothing is templated or generic.

**4**

CONTEXT DOCUMENTS

- **Goals & Ambition**
- **Constraints & Guardrails**
- **Business Snapshot**
- **How Work Gets Done**

**5**

KEY PEOPLE

- **Owner** -- Master Technician, Service `Lead`
- **Mike Reynolds** -- Lead Parts Runner, Parts & Inventory `Lead`
- **Linda Chen** -- Office Manager, Front Office `Lead`
- **Linda Chen** -- Office Manager, Front Office `Team`
- **Mike Reynolds** -- Lead Parts Runner, Parts & Inventory `Team`

**2**

ACTIVE PROJECTS

Projects in your portfolio were scored and placed across phases based on effort, ROI, alignment, and readiness.

# Confidence Assessment

**Roadmap confidence: 70/100** (form completion was 100/100, adjusted for quality gaps identified during generation)

Confidence score 100/100. The roadmap is grounded in detailed business context — strategic choices are well-supported.

## Information Gaps

| GAP | IMPACT | HOW TO RESOLVE |
|---|---|---|
| Actual complexity of owner's quoting methodology unknown until documentation begins | Phase 1 timeline could extend if quoting logic is more complex than estimated | Conduct structured interviews with owner to map decision trees for top 10 repair scenarios before project start |
| Current supplier relationship dynamics and pricing negotiation practices unclear | Supplier Price Database automation may miss critical relationship management aspects | Interview Mike Reynolds on supplier negotiation tactics and relationship maintenance requirements |
| Customer communication preferences and expectations not documented | Automated status updates may not match customer service standards or create new complaints | Survey recent customers on preferred communication frequency and format before automating updates |
| Insurance adjuster workflow variations and approval patterns unknown | AI quote generation may not account for adjuster-specific requirements, reducing approval rates | Analyze past 50 insurance jobs to identify adjuster-specific patterns and requirements |
| Technical skill assessment criteria for job assignments not formalized | Intelligent scheduling system may make poor tech-to-job matches without understanding skill requirements | Document tech skill matrix and job complexity requirements with senior techs and owner |

## Your Transformation Journey

Each phase builds on the last -- capabilities from one phase become the foundation for the next. This is not a menu of options. It is a sequence. Skip a phase and the later ones collapse.

## 1 Foundation & Knowledge Capture

Month 1-6

Build digital infrastructure and capture owner's tacit knowledge into documented systems. Establish backup decision authority and safety protocols before any AI deployment.

> **State Change:** FROM undocumented processes, single-point-of-failure decisions, and institutional amnesia TO captured knowledge, documented workflows, and the conditions under which automation can succeed.

**Why this phase matters:** This is the readiness phase. Without it, every later investment sits on sand. The outcome is not tools -- it is the conditions under which tools actually work. Organizations that skip this phase spend 3x later fixing what they broke early.

### How We Measure Success

- All critical processes documented and searchable
- Owner time on operational tasks reduced by 25%
- Zero lost or illegible job records
- Governance checkpoint passed before Phase 2 authorization

### What We Will NOT Do

- We will not deploy any AI automation in customer-facing workflows until quoting methodology is documented and backup authority is established.
- We will not automate scheduling or parts ordering until digital workflow visibility replaces the whiteboard system.

### Projects

| PROJECT | TYPE | DEPT | PRIORITY | EFFORT | ROI |
|---|---|---|---|---|---|
| **Digital Job Cards** Existing<br>Replace paper job cards with digital tracking system for workflow visibility<br>***Why:*** *Critical foundation for AI deployment. Creates data layer needed for automation. Addresses major action item for digital workflow visibility.* | Process Automation | Service | -- | 5/10 | 5/10 |
| **Quoting Knowledge Base** Suggested<br>Document owner's 30-year quoting methodology into structured decision trees and pricing templates<br>***Why:*** *Addresses critical action item. Required before any quoting automation. TENSION: requires tacit knowledge score > 70 but org scores 45.* | Data Synthesis | Service | 9.0 | 4/10 | 8/10 |
| **Backup Authority Training Program** Suggested<br>Cross-train senior techs and office manager on scheduling and parts ordering decisions | Self Service | Cross-functional | 8.5 | 3/10 | 7/10 |

| PROJECT | TYPE | DEPT | PRIORITY | EFFORT | ROI |
|---|---|---|---|---|---|
| ***Why:*** *Mitigates key person risk. Addresses major action item for backup decision authority. Essential before owner can delegate to AI systems.* | | | | | |

### Milestones

| WHEN | MILESTONE | DESCRIPTION | TYPE |
|---|---|---|---|
| Month 3 | Digital Workflow Infrastructure | Digital job cards system operational, whiteboard scheduling replaced with digital system, paper eliminated from job tracking | Capability |
| Month 5 | Quoting Methodology Documentation | Owner's quoting logic captured in structured templates covering 80% of standard repair scenarios, pricing decision trees documented | Capability |
| Month 6 | AI Safety Protocols Established | Clear procedures for disabling AI systems, manual fallback processes tested, rollback triggers defined | Governance |

### Capability Targets

- Digital workflow visibility across all job stages
- Documented quoting standards and pricing methodology
- Backup decision authority for routine operations
- AI deployment safety protocols and rollback procedures

### Risk Mitigations

| SEVERITY | RISK | MITIGATION |
|---|---|---|
| HIG | Owner resistance to documenting proprietary quoting knowledge | Frame as succession planning and business value protection. Start with simple scenarios and build complexity gradually. |
| MED | Digital system adoption disrupts current operations | Run parallel systems for 30 days. Train during slow season. Maintain paper backup until digital is proven. |
| HIG | Owner/Master Tech single point of failure continues | Cross-train Linda Chen on emergency triage decisions. Document hurricane protocols. Create decision delegation matrix for routine approvals. |

> **Why Pilot Automation comes next:** Foundation & Knowledge Capture established the foundation. Now Pilot Automation builds on that capability to deliver measurable outcomes. Without the previous phase, this phase would be premature. Without this phase, the previous work does not compound.

## 2 Pilot Automation

Month 7-12

Deploy first AI automation in controlled scope with manual oversight. Build supplier intelligence and test intervention capabilities.

> **State Change:** FROM readiness and foundation TO measurable automation results -- the organization sees the first compounding returns.

**Why this phase matters:** This phase converts readiness into results. The groundwork is laid -- now the organization sees the first measurable return. Each project in this phase was selected because the organization is ready for it, not just because it is valuable.

### How We Measure Success

- At least 2 production AI agents deployed with monitoring
- Owner time on operational tasks reduced by 50%+ from baseline
- Intervention drill passed: manual fallback activated within 2 minutes
- Customer satisfaction stable or improved during automation rollout

### What We Will NOT Do

- We will not automate customer-facing quoting until pilot automation proves reliable and safe.
- We will not deploy AI in emergency haul-out workflows until standard repair automation is validated.

### Projects

| PROJECT | TYPE | DEPT | PRIORITY | EFFORT | ROI |
|---|---|---|---|---|---|
| **Supplier Price Database** Existing<br>Automated system to track supplier pricing and availability across 6+ suppliers<br>***Why:*** *Lower-risk automation pilot. Builds data foundation for parts ordering AI. Addresses parts sourcing chaos in emergency repairs.* | Data Synthesis | Parts & Inventory | -- | 5/10 | 5/10 |
| **Insurance Photo Organization AI** Suggested Quick Win<br>AI system to organize and categorize the 3000+ photos on owner's iPhone for insurance documentation<br>***Why:*** *Quick win that saves 2-3 hours per insurance job. Low risk pilot for AI deployment. Leverages existing photo data.* | Data Synthesis | Front Office | 7.5 | 3/10 | 6/10 |
| **Automated Job Status Updates** Suggested<br>AI system to send proactive status updates to customers based on digital job card progress<br>***Why:*** *Customer-facing automation with manual approval gate. Builds toward intake-to-quote pipeline vision. Reduces office manager admin burden.* | Process Automation | Front Office | 8.0 | 4/10 | 7/10 |

### Milestones

| WHEN | MILESTONE | DESCRIPTION | TYPE |
|---|---|---|---|
| Month 8 | Pilot Intervention System | Manual override controls tested, safe-mode activation verified, rollback to manual processes validated within 15 minutes | Intervention |
| Month 10 | Supplier Intelligence Operational | AI system tracking prices across 6 suppliers, automated alerts for price changes, parts availability dashboard live | Adoption |
| Month 12 | Customer Communication Automation | Automated status updates sending to customers with owner approval gate, 90% reduction in status inquiry calls | Adoption |

### Capability Targets

- AI system monitoring and intervention protocols
- Automated supplier intelligence and price tracking
- Customer communication automation with approval gates
- Photo organization and insurance documentation workflow

### Risk Mitigations

| SEVERITY | RISK | MITIGATION |
|---|---|---|
| MED | Exception Inflation from automated status updates creating more customer questions than they answer | Size customer service capacity before scaling. Add quality gates between automated updates and customer delivery. Measure inquiry volume as success metric. |
| MED | Supplier price automation creates coordination drag with parts runners | Define handoff protocols before deployment. Name Mike Reynolds as single owner of supplier relationships. Measure coordination overhead as project cost. |

> **Why Scale Automation comes next:** Pilot Automation established the foundation. Now Scale Automation builds on that capability to deliver measurable outcomes. Without the previous phase, this phase would be premature. Without this phase, the previous work does not compound.

## 3 Scale Automation

Month 13-18

Deploy intake-to-quote pipeline automation with owner approval gates. Scale proven automation patterns to emergency workflows.

> **State Change:** FROM the owner IS the business TO the owner LEADS the business -- scalable, replicable, and no longer the bottleneck.

**Why this phase matters:** This is the payoff phase. The capabilities built in earlier phases now compound. The organization is no longer catching up -- it is pulling ahead. This phase proves the bet was right.

### How We Measure Success

- Owner fully transitioned from technician to business builder
- Revenue per technician at or above target
- Customer wait time under 48 hours sustained for 6+ months
- Organization can operate for 2 weeks without owner present

### What We Will NOT Do

- We will not fully automate quoting without owner review until system proves 95% accuracy over 3 months.
- We will not automate final quality inspections or sea trials — owner expertise remains required.

### Projects

| PROJECT | TYPE | DEPT | PRIORITY | EFFORT | ROI |
|---|---|---|---|---|---|
| **AI Quote Generation System** Suggested<br>AI system generates initial quotes using documented methodology, owner reviews and approves in one click<br>***Why:*** *Core business transformation toward AI ambition. Built on Phase 1 knowledge capture. Addresses 2-4 hour quoting bottleneck.* | Decision Support | Service | 9.5 | 6/10 | 9/10 |
| **Emergency Triage AI** Suggested<br>AI system provides initial emergency assessment and resource allocation recommendations<br>***Why:*** *Scales proven automation to emergency workflows. Reduces emergency response time. Owner retains final authority on crew dispatch.* | Decision Support | Service | 8.5 | 5/10 | 8/10 |
| **Intelligent Scheduling System** Suggested<br>AI system optimizes tech assignments and scheduling based on skills, availability, and job requirements<br>***Why:*** *Replaces whiteboard scheduling with AI optimization. Targets 85% tech utilization goal. Reduces weather disruption impact.* | Process Automation | Service | 8.0 | 5/10 | 7/10 |

### Milestones

| WHEN | MILESTONE | DESCRIPTION | TYPE |
|---|---|---|---|
| Month 14 | Quote Generation Intervention System | AI quote override controls operational, manual quote generation available within 5 minutes, accuracy monitoring dashboard live | Intervention |
| Month 16 | Intake-to-Quote Pipeline Live | AI generates quotes from customer intake, owner approves in one click, 90% of quotes delivered within 4 hours | Adoption |
| Month 18 | Owner Time Reduction Achieved | Owner scheduling and quoting time reduced to under 5 hours/week, tech utilization above 85%, customer wait time under 48 hours | Adoption |

### Capability Targets

- AI-assisted quote generation with human approval
- Emergency triage automation with owner oversight
- Intelligent scheduling optimization
- End-to-end intake-to-quote pipeline automation

### Risk Mitigations

| SEVERITY | RISK | MITIGATION |
|---|---|---|
| HIG | AI quote accuracy insufficient for insurance work requiring 48-hour SLA | Start with standard repair quotes, not insurance. Build accuracy over 3 months before enabling insurance workflow. Maintain manual override for complex jobs. |
| MED | Admin Moved to Seams — quoting automation creates more exception handling for office manager | Map full workflow end-to-end before automating. Count hidden repair work as project cost. Train Linda Chen on quote review and exception handling. |
| MED | Scheduling AI creates coordination drag between techs and office | Define clear handoff protocols. Single owner (Linda Chen) for schedule changes. Measure coordination overhead weekly. |

## Source Citations

Every claim in this roadmap traces back to one of the inputs below. This is the evidence trail -- proof that the recommendations are grounded in your data, not guesswork.

| SOURCE | DETAILS | PROVENANCE |
|---|---|---|
| **Organization Context** | 4 document(s) -- Company Profile, Smb Constraints, Smb Operations, Strategic Goals | org_context table, is_active=true, all types |
| **Departments** | 3 configured -- Service, Parts & Inventory, Front Office | departments table |
| **Project Portfolio** | 2 project(s), 2 scored, 0 quick wins | projects table, status != archived, ordered by ai_score desc |
| **Readiness Assessment** | Verdict: conditional, Score: 65/100, 5 dimensions, 5 action items | org_readiness_assessments table, latest version |
| **Input Confidence** | 100/100 (high), 0 known gaps | compute_org_confidence() — heuristic from data completeness |
| **Project Sourcing** | 2 from your portfolio + 7 AI-suggested (9 total) | Projects matched by project_id then by title (lowered, trimmed). Unmatched projects are tagged is_suggested=true. |
| **Generation Agent** | AdoptionRoadmapAgent (temp=0.2, 6338 + 4350 tokens) | adoption_roadmap_agent.txt |

# Appendix: Your Responses

The full context you provided, preserved here so you can see exactly what shaped this roadmap.

### Goals & Ambition

STRATEGIC GOALS

# Goals & Ambition

## 12-Month Priority
**Top goal:** Increase annual job capacity from ~200 to ~350 without adding more than 3 technicians

**Success definition:** Owner under 5 hours/week on scheduling and quoting. Tech utilization above 85%. Customer wait time under 48 hours. Revenue per technician above $200k/year.

## AI Ambition
**What AI success looks like:** AI handles intake-to-quote pipeline. Owner reviews and approves in one click. Customer gets proactive status updates automatically.

**What they'd do with 10 extra hours/week:** Mentoring junior techs, doing complex composite repairs, taking Sundays off.

**AI tools tried:** ChatGPT for drafting customer emails, QuickBooks automated invoicing

## Growth Vision
**3-year vision:** The Gulf Coast reference yard. 3 locations. Revenue $8M+ with 28%+ margins.

**Biggest obstacle:** Owner is the bottleneck. Every quote, schedule, parts order, and quality check depends on one person. The business is the owner.

## Constraints & Guardrails

SMB CONSTRAINTS

# Constraints & Guardrails

## Budget

**Monthly budget ceiling:** $5,000/month

**Approval speed:** Owner can approve same-day but no time to evaluate.

## Risk Tolerance

**Non-negotiables (what can't go wrong):** Repair quality. Personal customer relationships. Technician safety. Data security for insurance claims.

**Automation comfort level:** enthusiastic

## Compliance

**Regulatory requirements:** OSHA, EPA, USCG, Insurance data handling

## Decision Authority

Owner has complete authority. No board or partners. Over $10k requires owner sign-off. Under $500 delegated to office manager and lead techs.

**People who can veto decisions:** Owner. Lead techs on safety. Office manager on scheduling changes.

**What would make them pull the plug:** Admin burden on techs. Customer data risk. Cannot disable if not working.

## Business Snapshot

COMPANY PROFILE

# Business Snapshot

## About Your Business

**Industry:** Marine Services & Repair

**Years in business:** 15

**Number of employees:** 22

**Annual revenue range:** $2M-$5M

## What Makes You Different

Only full-service yacht yard between Mobile and Tampa with certified composite, electrical, and diesel repair. 24/7 emergency haul-outs. Master shipwright with 30 years experience.

## Your Customers

**Primary customers:** Mid-to-large cruising yachts (40-80ft), sport fishing boats, local charter fleets, insurance companies.

**How you find and win new customers:** 90% referral and marina relationships. Referral agreements with 6 major marinas. Listed on ActiveCaptain and YachtWorld.

**How you serve them:** Customer calls → office manager triages → owner inspects every boat → writes quote by hand → orders parts → schedules techs on whiteboard → techs use paper checklists → owner final inspection → office manager invoices. Average job 3-5 days but scheduling adds 2-3 days.

## Current State

**Business health (1-5):** 4

**What they wish they had more time for:** Fixing boats instead of phone tag with suppliers and adjusters. Taking a weekend off.

## How Work Gets Done

SMB OPERATIONS

# How Work Gets Done

## Your Team

Owner/Master Tech (30yr). Office Manager (8yr). 4 Senior Techs (10-20yr). 3 Junior Techs. 2 Parts Runners. 1 Detailer. 1 Bookkeeper.

### Workflow 1: Emergency Haul-Out & Repair

**Steps:** Customer calls emergency → office manager takes details → owner assesses urgency → crew dispatched → boat to yard → owner inspects and writes emergency quote → parts runner sources materials → techs triage → owner final inspection and sea trial → office manager bills.

**Pain points / breakdowns:** No standard triage protocol. Parts sourcing during emergencies is chaos. Insurance quotes miss 48-hour SLA 30% of time. Emergency jobs displace scheduled work.

### Workflow 2: Standard Repair & Refit

**Steps:** Customer requests quote → owner inspects boat → writes quote manually (2-4 hours) → customer approves → office manager finds slot on whiteboard (3+ weeks out) → parts runner orders from 6+ suppliers → techs execute with paper job cards → owner inspections → office manager invoices.

**Pain points / breakdowns:** Quoting is pure art in owners head. Whiteboard scheduling fails when weather disrupts. Paper job cards get lost. No job status visibility without walking yard. Parts late or wrong.

### Workflow 3: Insurance Survey & Quote

**Steps:** Adjuster contacts office → owner surveys boat next-day → takes photos, writes survey → writes repair quote → office sends both to adjuster → adjuster approves or requests changes → if changes, owner reworks quote (1-2 hours).

**Pain points / breakdowns:** Surveys and quotes written from scratch each time. No template or automation. Adjuster revisions eat 3-5 hours per job. Photos unorganized on owner iPhone. Insurance is 40% of revenue but 60% of owner admin time.

## Tool Stack

QuickBooks Online, Gmail, Google Calendar, Microsoft Excel (parts inventory), WhatsApp, Paper job cards, Physical whiteboard, Owner iPhone for photos (3000+), Square for payments.

**Overall integration level:** minimal

## Unwritten Knowledge

**Knowledge in people's heads:** Owner quoting logic after 30 years. Which suppliers have which parts at best prices. How to diagnose electrical faults on older Hatteras and Bertram. Which insurance adjusters are reasonable. The real schedule in owners head. Hurricane protocols.

**Decisions relying on gut feel:** Customer priority when schedule full. Quote pricing intuitive. Whether to take job from difficult adjuster. When to hire. Which tech gets which job based on unwritten skill assessment.

Generated by AESOP OS on June 11, 2026 for Gulf Coast Marine & Yacht - Test 1781205678 (v1). This roadmap is a standing hypothesis -- when reality diverges, revise, do not defend.

Methodology: AESOP Eleven Tenets, temperature-locked deterministic generation, post-generation structural validation, cognitive density forecasting, named failure pattern mitigations.