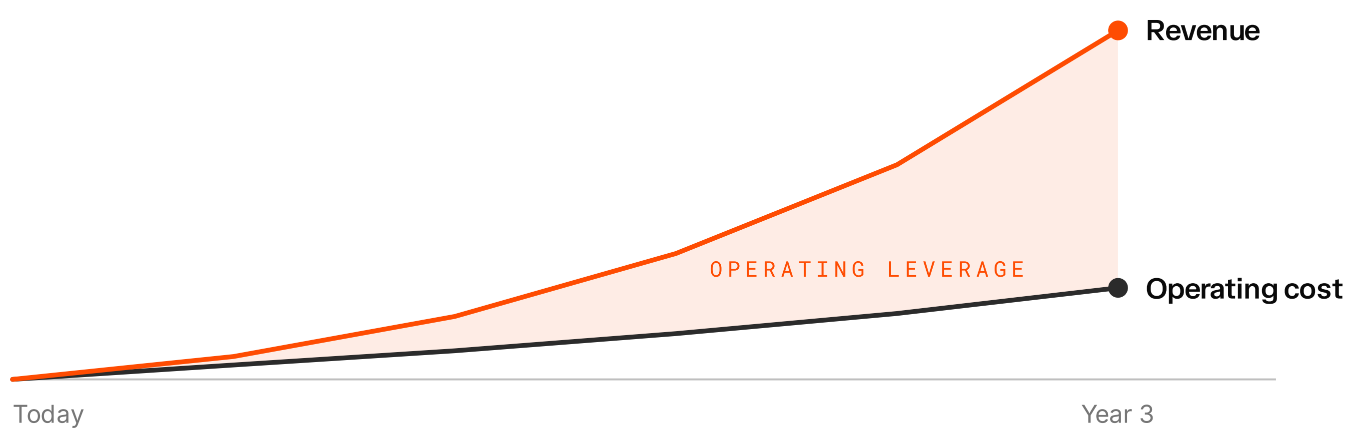
TEN IDEAS

The Top 10 AI and Automation Ideas for Mid-Market Companies

The companies pulling ahead right now are not cutting their way there. They are **investing in AI and automation to create operating leverage** — growing revenue faster than they have to grow the cost base to support it.

The mechanism is simple. Every hour returned to someone you already employ is capacity you do not have to hire. Every margin point you stop giving away drops straight through. Do that in four or five places at once and the two lines separate.



Illustrative shape, not a forecast. It is what the arithmetic produces when several of the ideas that follow land together and the capacity they return gets pointed at growth.

The pages that follow are the top 10 AI and automation ideas we keep hearing about from our clients, whatever industry they sit in.

They cluster in three places: **sales**, **finance** and **operations**.

Grow revenue without growing the team

Four places where selling capacity is created rather than hired.

01 Give your team their selling week back

Before the call, AI builds the enriched target list and drafts the pre-call brief. After it, a sixty-second voice note or a forwarded email becomes the CRM entry, from the phone, the same day.

> Sales teams commonly put **40%** of the week into admin — and at one company, about **half** of all customer touches never got entered at all.

02 Quotes and proposals out the same day

Standard and repeat quotes draft themselves from your own product, pricing and configuration data. Long customer documents get read automatically, so the lines that matter are extracted rather than hunted for. Complex work still gets a person; routine work stops consuming one.

03 The quotes that go quiet

A scheduled sweep finds silent quotes, stalled proposals and abandoned carts, and sends a personalized recapture with one click to buy or book a call.

> At one company, **57–60%** of quotes never got an answer at all.

04 New hires productive in months, not years

Product, pricing and process knowledge becomes a maintained assistant instead of a binder, so a new person can answer without routing through a senior one. A 12 to 16 month ramp is common in complex selling; cutting it by a third pulls a full quarter of revenue forward per hire.

Protect the margin you already earn

Three places where price, cost and program decisions get made on evidence.

05 Knowing the competitor's price first

An agent captures competitor list and promotional pricing from published sources on a schedule and matches it to your equivalents, so the picture is ready the week finance sets the annual increase rather than gathered by hand afterward.

> A quarter of a point on the annual increase is **$452,500** a year at one company's $181M of revenue — the increase you already planned, simply landing a little higher.

06 Supplier costs that move both ways

Monitor the inputs and contracts behind your largest spend categories, pair each movement against your own usage and coverage, and put a recommendation in front of a person. When costs rise you buy ahead. When they fall, vendors get asked for the decrease instead of the window quietly closing.

07 The programs you renew on autopilot

Rebates, incentives, co-op marketing and volume programs get renewed each year on judgment. The analysis compares customers on a program against similar ones without it and ranks every program by margin returned per dollar spent.

> One company renews **$2.5M** across about 30 programs every year. Repointing a single average program is **$83K** a year.

Free the capacity you are already paying for

Three places where cash and hours are sitting in plain sight.

08 AP and AR that only touch the exceptions

On payables: read the invoice, three-way match it, post the clean ones, and flag any line outside tolerance before payment rather than after. On receivables: apply payments to invoices automatically and work a prioritized past-due queue with the outreach already drafted.

> Published benchmark: **78%** lower cost per invoice. And one day of DSO on a $181M business is roughly **$496K** of cash.

09 The questions your team answers over and over

A read-only assistant over your own systems answers status, availability, pricing and account questions in plain language, wherever the question arrives. Nothing gets written back, and nobody has to change how they work.

> One company's service desk fields **100 to 120** calls a day on questions the system already knows — about **4,100 hours** a year of chasing.

10 The re-keying tax

Data gets entered once; a bot re-keys it into every customer, partner or regulator portal inside the window, and people keep the exceptions. One company runs 23 customer portals — about two full-time people.

Where the value shows up

Ranges are actual sized opportunities from client engagements, built on each company's own volumes, hours, rates and spend bases.

AREA	WHAT CHANGES	TYPICAL ANNUAL VALUE
Sales capacity & pipeline	Selling hours returned; more first meetings	**$400K – $675K**
Quoting & proposals	Same-day quotes; senior people freed from routine ones	**$100K – $600K**
Knowledge & onboarding	Answers self-served; new-hire ramp compressed	**$180K – $530K**
Pricing, programs & purchased cost	Margin protected on sell side, recovered on buy side	**$85K – $500K**
AP & AR	Exceptions-only processing; cash pulled forward	**$50K – $120K each**
Working capital & cash cycle	Payments applied same-day; idle cash and stock released	**$350K – $3.2M**

Directional estimates of value at stake, not savings guarantees. Where an input had to be assumed we used the conservative end of the stated range. Your numbers will differ — running the exercise on them is usually the most useful part.

THE NEXT STEP

Let's find where the operating leverage sits in your business.

A short working session maps these ideas against your own volumes, hours and cost bases — which ones pay, and what the first one takes. Most lists come back shorter than expected.