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we do complicated.

CASE STUDY

Turning Days into Minutes with AI

Demonstrating how the right AI strategy can turn repetitive work into faster, more efficient business processes.

The Problem

Most businesses have a process that started out simple and got harder as the business grew. It still gets done, but it takes more time and more people than it should.

For this client, that process was manually checking financial records against each other every month. What used to take a few days had crept up to a full week, and the whole thing depended on one or two people who knew the process inside and out.

We already knew about this bottleneck from our ongoing technology work with the client. The goal was never just "make it faster." Whatever we built had to follow the same process the team trusted, produce results they could count on, and still give them a chance to review and approve everything before it was final.



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PERCENT

of organizations now use AI in at least one business function.

Source: McKinsey, The State of AI 2025

1012 38th Avenue N, Suite 301, Myrtle Beach, SC 29577 / 843-353-2929 / www.archetypesc.com

The Solution



We didn't just replace the client's process, we learned it first. Our team worked through each step, decision, and exception to understand how the monthly workflow actually worked and where AI and automation could make the biggest impact.

We then built an AI agent using Microsoft Copilot, ChatGPT, and Claude to follow those same steps automatically, using the business rules the team already trusted. This approach combines AI strategy, automation, data, and governance into a solution that's both efficient and built for the client's existing environment. Because it uses tools the client already licenses, the same approach can extend to other workflows without adding new software.

Security and human oversight were built in from the start. Every result is reviewed by staff before it's finalized, while the client's existing governance and security controls help keep sensitive data protected.

The goal isn't to replace people. It's to give them their time back, turning a week of repetitive work into time they can spend on tasks that need their expertise and judgment.

The Results

Processing time dropped from roughly four days to just 15 minutes, while keeping the same review process and reducing reliance on one or two employees.

This project has become a model for how we help Microsoft 365 and technology consulting clients turn manual, rules-based processes into smarter, AI-powered workflows.

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PERCENT

Reduction in processing time. A workflow that once required **four days can now be completed in approximately 15 minutes**.