Tech4Biz

Excellence Guaranteed!

Case study

Tech4Biz
Excellence Guaranteed!

CS09

AI Business Operations and CEO Agent

An AI operating layer that lets an owner ask one question and get one answer

Sector: professional services, technology, distribution, construction, healthcare and light manufacturing

Geography: United States. Company size: 20 to 200 employees.

Figures are measured outcomes from delivered work. The client is described by sector and geography at the client's request.

THE BUSINESS PROBLEM

The situation before we started

The business ran on more systems than any one person could watch. The owner asked a simple question and the answer sat in six places at once, so the week went on collecting information rather than deciding what to do with it.

01

Sales lives apart from money

Pipeline sits in the CRM and revenue sits in the accounting system. Neither one can answer a question that needs both.

02

Context stays in the inbox

Customer conversations sit in Gmail. The person who has to act on them rarely sees the history.

03

Reports are stale on arrival

Managers spend 5 to 10 hours a week assembling reports that are already out of date when they are read.

04

The owner searches instead of deciding

Owners report 5 to 15 hours a week spent finding information that already exists somewhere in the business.

05

Follow ups quietly disappear

Between 10 and 30 percent of opportunities and tasks lose their follow up because no system is watching them.

06

There is no single place to ask

Nobody in the company can answer the question, what is actually happening across this business right now.

WHAT WE CHANGED

The issue, what we implemented, and what it moved

What was wrong	What we implemented	What it delivered
Pipeline sat in the CRM and revenue sat in accounting	Cloud Run connectors load both into one governed BigQuery model	**Cross system questions answerable in a single query**
Managers rebuilt the same reports every week	Looker dashboards on the published BigQuery layer	**60 to 80% less reporting effort**
The owner spent the week hunting for information	Gemini Enterprise grounded on BigQuery, inside the Workspace side panel	**50 to 70% less time spent searching**
Follow ups were missed with nothing watching them	Operations agent on the Agent Platform, on schedule and on triggers	**50 to 80% fewer missed follow ups**
Decisions waited on someone assembling numbers	Daily briefing generated from the governed model and delivered in Gmail	**30 to 50% faster decision cycle**
Repetitive internal work all sat with people	Four task agents with named human approval gates	**30 to 60% of repetitive workflows automated**

Middle column names the Google Cloud service that did the work. Right column is measured against the baseline captured in phase one.

SOLUTION OVERVIEW

What we built, and where we drew the line

We connected the systems the business already paid for and put a governed data layer underneath them. Gemini reads across that layer and a set of task agents work on top of it. The owner asks a question in plain English and gets an answer with the records behind it.

WHAT THE SYSTEM DOES

- Reads across CRM, accounting, Gmail, Drive, Sheets and Calendar in one query
- Ranks the five things that need the owner's attention today and says why
- Explains why a number moved and shows the underlying records
- Drafts follow ups, briefings and replies for a named human to approve
- Watches for missed follow ups, overdue projects and unusual activity

WHAT THE SYSTEM NEVER DOES

- Moves money, approves a payment or edits a ledger entry
- Sends an external email without a named human approving it
- Makes or recommends a hiring, firing or compensation decision
- Answers from memory when the source system is unreachable, it says so instead
- Exposes a record to a user who cannot already see it in the source system

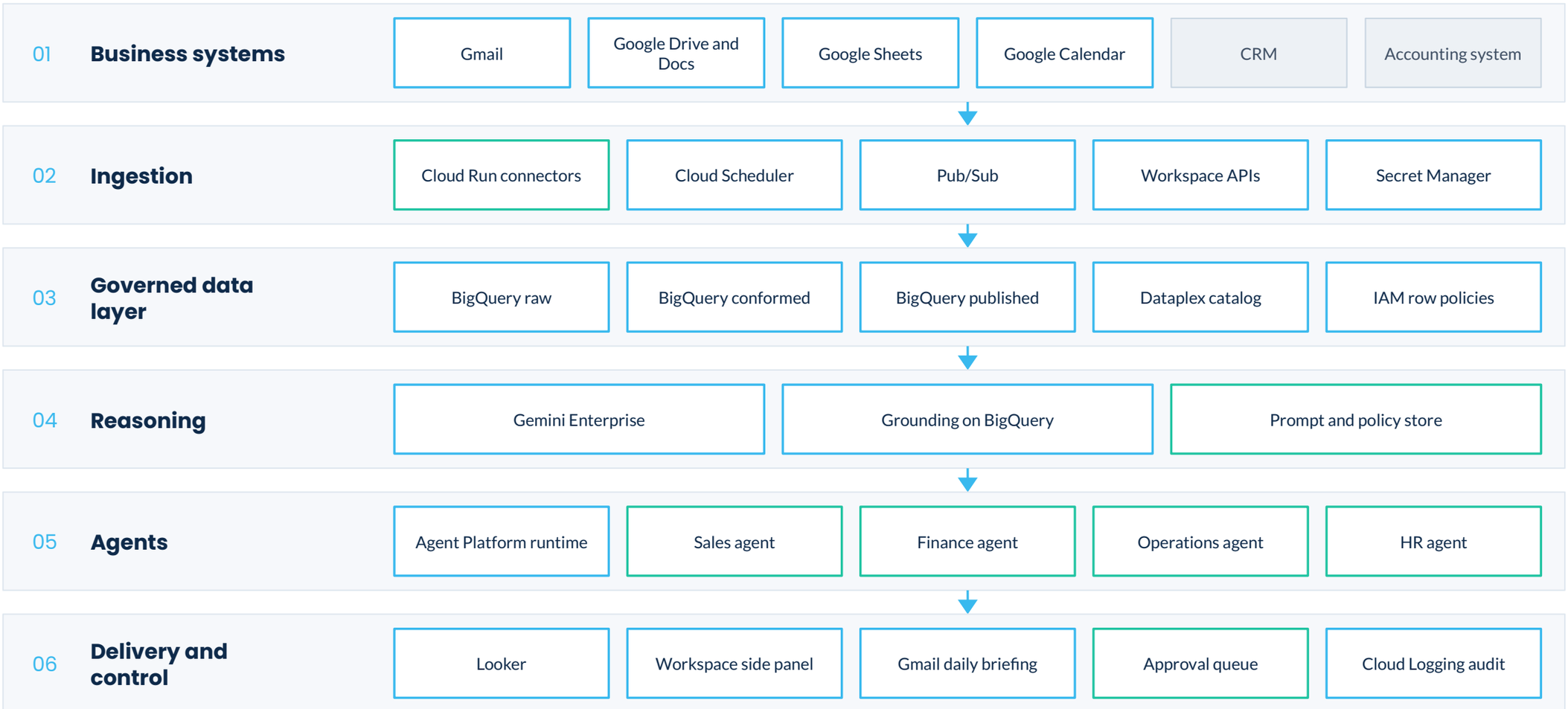
ARCHITECTURE

How the platform is put together

01	**Source systems**	Gmail, Drive, Docs, Sheets, Calendar, Meet, CRM, accounting software and operational spreadsheets
02	**Ingestion**	Cloud Run connectors run on a schedule and on events, with change capture rather than full reloads
03	**Business data layer**	BigQuery holds the governed model. Entities, owners, dates and money are defined once and reused everywhere
04	**Reasoning**	Gemini Enterprise answers only against the governed model, so every answer can be traced to a row
05	**Agents**	Gemini Enterprise Agent Platform runs the sales, finance, operations and HR agents on a schedule and on triggers
06	**Delivery**	Looker dashboards, a Workspace side panel and a daily briefing that lands before the owner opens the laptop

Google Cloud services used Gemini Enterprise · Agent Platform · Google Workspace · BigQuery · Looker · Cloud Run

The components and how they connect



RUNTIME DATA FLOW

What happens when a customer email arrives

01

Capture

The Cloud Run Gmail connector picks up the new thread on its event trigger.

02

Normalise

The message, thread and participants are written into BigQuery raw.

03

Resolve

The conformed layer matches the sender to an account, an owner and open invoices.

04

Ground

Gemini Enterprise queries only the published layer, so the answer carries its rows.

continues

05

Decide

The operations agent applies the escalation rules and sets a response clock.

06

Draft

The agent composes the reply and the internal brief from the retrieved records.

07

Approve

A named human releases the outbound message from the approval queue.

08

Record

The prompt, the rows read, the action and the approver land in Cloud Logging.

Nothing leaves the company until step seven. Steps one to six are read only.

CAPABILITIES

What the four agents actually do

Sales

- Qualifies and prioritises incoming leads
- Flags deals that are going quiet
- Prepares a brief before every meeting
- Explains why a deal was lost
- Builds the forecast from pipeline movement

Finance

- Watches revenue, margin and expense drift
- Tracks receivables and ageing by customer
- Drafts payment follow ups for approval
- Forecasts cash from real payment behaviour
- Ranks customers by true profitability

Operations

- Finds overdue and slipping projects
- Spots bottlenecks and resource gaps
- Produces the daily and weekly summary
- Detects activity that breaks the pattern
- Keeps KPI owners honest on dates

HR

- Answers policy questions from the handbook
- Runs the onboarding checklist
- Handles leave and benefits questions
- Finds employee documents on request
- Chases training and renewal dates

WORKED EXAMPLE

A customer complaint arrives at 4pm on a Friday

01 Detect

Gemini reads the incoming Gmail thread and recognises a service complaint rather than routine correspondence.

02 Enrich

The agent pulls the account history from the CRM, the open invoices from finance and the live projects from operations.

03 Weigh

It works out that this account is in the top decile of revenue and has two invoices already past due.

04 Escalate

It raises an escalation, assigns the account manager and sets a response clock.

05 Draft

It writes a reply that references the actual history, and holds it for the account manager to approve.

06 Surface

The issue appears on the executive dashboard and in the owner's Monday briefing with the full trail attached.

This is an agentic workflow rather than a chatbot. The value comes from the four systems the agent read before it wrote a single word.

SECURITY, CONTROL AND GOVERNANCE

The controls that make this deployable in a real business

Identity

Users sign in with Google Workspace SSO. The agent inherits the permissions the user already has.

Residency

All data stays inside the customer's own Google Cloud project. Nothing is pooled across customers.

Grounding

Every answer carries the query and the source rows. An answer without a source is refused, not guessed.

Approval gates

Any action that leaves the company needs a named human to approve it first.

Audit

Every agent run, prompt, tool call and approval is written to an immutable log.

Retention

The customer sets retention on the data layer and on the agent transcripts separately.

DELIVERY

How the engagement ran

Weeks 1 to 3

Connect and baseline

We connected Workspace, CRM and accounting, audited data quality and published the first governed model. The owner had a working dashboard in week three.

Phase 1

Weeks 4 to 7

Executive intelligence

The daily briefing went live. Gemini began answering cross system questions in the Workspace side panel, and every answer showed its records.

Phase 2

Weeks 8 to 12

Agents and approvals

The four task agents went live with approval gates. Escalation, follow up and reporting workflows started running without a person starting them.

Phase 3

Ongoing

Expand

The governed model and the agents are now run as business as usual, with new questions and new workflows added against the same data layer.

Phase 4

Every phase ended with something the customer could use. No phase ended with a document only.

RESULTS

What the engagement delivered

Business KPI	Baseline problem	Result delivered
Management reporting time	5 to 10 hours per week	**60 to 80% reduction**
Time spent searching for information	5 to 15 hours per week	**50 to 70% reduction**
Manual report preparation	Several hours per report	**70 to 90% reduction**
Response time to internal questions	Hours to days	**50 to 80% faster**
Management decision cycle	Days	**30 to 50% faster**
Missed follow ups	10 to 30% of opportunities	**50 to 80% reduction**
Executive productivity	Highly manual	**10 to 20 hours per week recovered**
Repetitive workflows automated	Low	**30 to 60% of workflows**

Each figure is measured against the baseline captured in phase one of the same engagement. Client identity is withheld at the client's request.

HEADLINE RESULTS

The five numbers this engagement moved

60 to 80%

Less management reporting effort

50 to 70%

Less time spent searching

30 to 60%

Repetitive workflows automated

10 to 20 hrs

Executive time recovered weekly

30 to 50%

Faster decision cycle

What that looked like in this business

Before we started, this 75 person business spent roughly 40 management hours a month preparing reports and gathering information. After go live that settled at about 10 hours a month, returning close to 30 management hours to the business every month.

GOOGLE CLOUD IMPACT

Three layers of measurement in every engagement

01 Business impact

Revenue, cost, productivity, downtime, inventory and customer experience. This is what the customer signed for.

02 AI impact

Automation rate, response time, prediction accuracy, resolution rate and human hours returned. This is what proved the system worked.

03 Google Cloud impact

Consumption and adoption the deployment created. This is what grows the account.

CONSUMPTION THIS DEPLOYMENT CREATED

- Gemini users activated
- Gemini agent interactions per month
- Workspace seats using AI features
- BigQuery queries per month
- Data stored in BigQuery
- Cloud Run workloads in production
- Agent executions per month

WHERE IT FITS

The businesses this solution is built for

This solution is designed for professional services, technology, distribution, construction, healthcare and light manufacturing. Geography: United States. Company size: 20 to 200 employees.

Professional services

Technology companies

Distributors

Construction

Healthcare businesses

Manufacturing

Logistics

Multi location businesses

The common shape

These businesses all have real operational complexity and no in house platform team. They already pay for the systems that hold the data, and they have never had a way to use it together. That is the gap this solution closes.

What we flagged before we started

RISKS WE MANAGED EXPLICITLY

CRM data quality sets the ceiling

If the CRM is half filled, the agent will say less than the owner hoped. We audit and score data quality in week one and report it honestly.

Confident answers invite over trust

Owners can accept a fluent answer without checking it. Every figure carries its source rows, and the agent refuses to answer when grounding is missing.

A generic briefing kills adoption

The first briefing has to match how this owner already thinks. We tune it with the owner directly rather than shipping a template.

Scope grows the moment value appears

We fix the phase one boundary in writing, and new asks go into the phase three backlog with their own estimate.

Workspace licence tier decides features

Which Gemini and agent features are available depends on the customer's licence. We confirm the tier before design starts.

WHAT WE SETTLED IN DISCOVERY

- Which accounting system is in use, and does it expose a usable API or only exports?
- Who is the named approver for outbound actions in each department?
- What is the customer's retention policy for agent transcripts?
- Does the customer want the data layer in their own project or in a Tech4Biz managed project?

Tech4Biz
Excellence Guaranteed!

Let us talk about your operation

The next step we would suggest is a two week assessment against your own data. It tells you which of these numbers are reachable in your business before you commit to a programme.

COMPANY	Tech4Biz Solutions Private Limited
OFFICES	Bengaluru, India and Atlanta, United States
WEB	tech4bizsolutions.com
DOCUMENT	CS09 AI Business Operations and CEO Agent

Disclaimer

This document describes work Tech4Biz Solutions has delivered. The performance figures shown were measured after implementation against a baseline captured during phase one of the same engagement. They describe what this client achieved and they are not a warranty of the same outcome elsewhere.

Results in another business will depend on the quality and completeness of its existing data, the systems in use, the level of process change it is willing to make, and the licence tiers held for the underlying platform services.

Client identities are withheld at the client's request. Sector and geography descriptors are provided in place of names, and figures are reported as measured.

Google Cloud, Gemini, BigQuery, Looker, Vertex AI, Google Workspace and Google Maps Platform are trademarks of Google LLC. Tech4Biz Solutions is an independent implementation partner and is not speaking on behalf of Google.

This document is confidential and is provided for evaluation by the named recipient only. It may not be redistributed without written permission from Tech4Biz Solutions Private Limited.