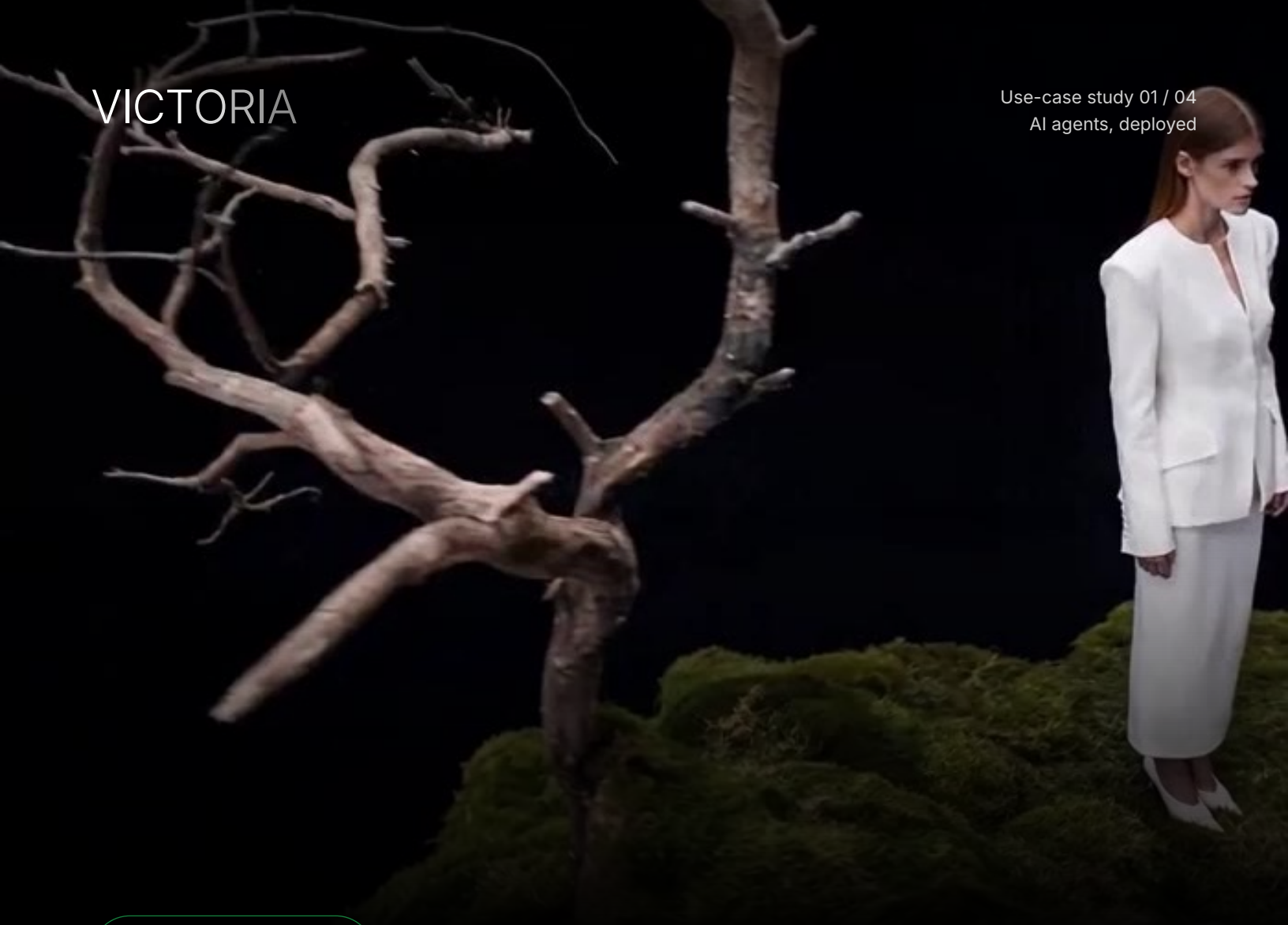


Built on WhatsApp

Field operations · WhatsApp document automation

The WhatsApp Voice Note to Document Agent

Crews send a WhatsApp voice note. The paperwork writes itself, on brand, matched to the right job, and filed the same day.

Best fit

Construction, plumbing, electrical and field service trades

Business constraint

Supply constrained
Gives the team capacity back

Connects to

WhatsApp · Job records · SharePoint

The problem

Field teams carry a document load that was designed for a desk.

Foremen and technicians have to complete site registers, risk assessments and plant registers. After a long day on site, nobody wants to sit down and type it all up. So the paperwork runs days behind the work, and the business carries that gap as cost and as risk.

The hidden costs

01	**Paid hours spent typing**	Skilled people spend part of every week turning what they already know into forms.
02	**Records days behind the work**	Late safety and compliance records are a real exposure, not an admin nuisance.
03	**New tools nobody adopts**	Asking a field crew to learn another app is a change-management cost of its own.

Before and after

Today

× Notes on paper or memory, typed up days later

× Documents rebuilt by hand in different formats

× Office staff chasing missing registers

× Compliance gaps discovered at audit time

With the agent

→ A WhatsApp voice note sent from site, in seconds

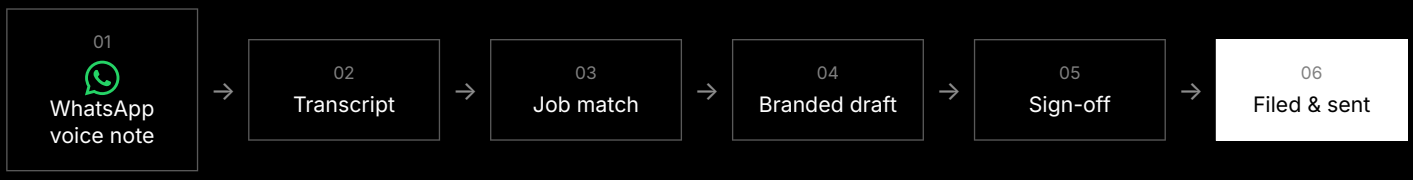
→ A branded draft matched to the correct job

→ A person reviews and signs off the draft

→ Filed and sent automatically, same day

How the agent works

Six steps. People stay in the loop.



01	**Capture on site**	A crew member sends a voice note on WhatsApp, the app they already use every day. Nothing new to learn.
02	**Transcribe**	The agent turns the recording into clean text and pulls out the facts the document needs.
03	**Match to the job**	It finds the right project in the job records, so every document lands against the correct site.
04	**Draft on brand**	It writes the register or risk assessment into the company's own branded PDF template.
05	**Human sign-off**	Every document starts as a draft. A responsible person reviews, corrects and signs it off.
06	**File and send**	The signed document is saved to SharePoint automatically and sent to whoever needs it.

Connects to

WhatsApp · Speech to text · Job and project records · Branded PDF templates · SharePoint · Email

Built-in controls

Draft first, always

Nothing is filed until a person has reviewed and signed it.

Traceable

Each document links back to the original voice note and the job it belongs to.

One document first

Start with the form the team hates most, prove it, then add the next.

The business case

The time and risk math

ILLUSTRATIVE MODEL

25

paid hours a week

5 foremen × 5 hours of paperwork each

1,250

hours a year

25 hours × 50 working weeks

Same day

records

instead of days behind the work

Multiply the hours by your loaded hourly cost to put a dollar figure on it, then add the value of closing the compliance gap.

WHY IT GETS ADOPTED

Nobody has to learn anything new. Everyone already knows how to send a voice note, and everyone already knows what goes into the document. That is why this agent gets used from week one.

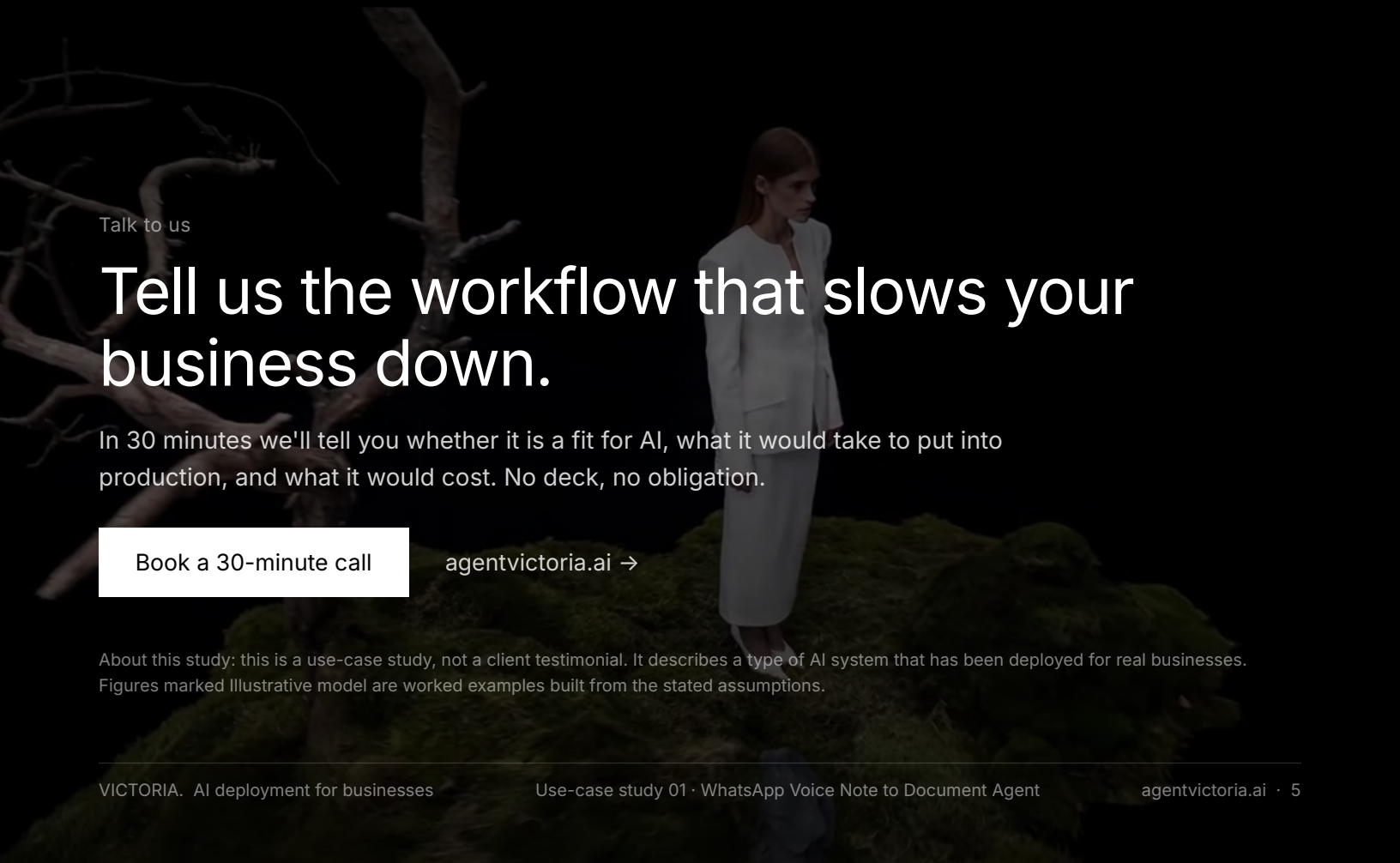
The question that starts the conversation

“Which document does your team hate filling out the most?”

How Victoria delivers it

Five phases. Testing is one of them.

01	**Scope & data readiness**	One document type, one owner, one number to move: hours of paperwork per foreman.
02	**Build against your systems**	Wired into your messaging, job records and document store, not a standalone app.
03	**Test on your real cases**	Run against real voice notes and past documents before any crew relies on it.
04	**Deploy with controls**	Draft-first sign-off, audit trail and a kill switch from day one.
05	**Run & improve**	Measured monthly, then extended to the next document the team wants gone.



Talk to us

Tell us the workflow that slows your business down.

In 30 minutes we'll tell you whether it is a fit for AI, what it would take to put into production, and what it would cost. No deck, no obligation.

Book a 30-minute call

agentvictoria.ai →

About this study: this is a use-case study, not a client testimonial. It describes a type of AI system that has been deployed for real businesses. Figures marked Illustrative model are worked examples built from the stated assumptions.