

The Small Business AI Audit

Find where AI can save your business 5+ hours a week. In under 10 minutes.

Most small business owners are losing 10 to 15 hours a week to work that AI can already do. The trick is knowing where to look. Walk through the 7 areas below. Check every box that sounds like your business. Add up your checks at the bottom and you'll know exactly where to start.

1. Lead Response

Most owners lose 2-3 hours a week here.

- ☐ We can't always answer the phone during business hours.
- ☐ Leads from our website or social media wait hours (or days) for a reply.
- ☐ Nobody owns 'first response' on inbound leads.
- ☐ We've lost jobs to a competitor who just answered faster.

AI fix: Install an AI receptionist + chatbot that responds in under 5 minutes, 24/7.

2. Follow-Ups

Most owners lose 3-4 hours a week here.

- ☐ We send a quote and then hope they call back.
- ☐ We don't have a system for day-3, day-7, day-14 follow-up.
- ☐ Our office manager (or owner) is the only one who can follow up.
- ☐ We've found old quotes that never got a single follow-up touch.

AI fix: Automated bid follow-up sequence that runs without your team touching it.

3. Content & Social Media

Most owners lose 2-4 hours a week here.

- ☐ We post when we remember to, which isn't often.
- ☐ Our blog hasn't been updated in months (or years).
- ☐ We have ideas for content but no time to make them.
- ☐ Our competitors are showing up more in Google and AI search than we are.

AI fix: AI marketing coworker that writes, posts, and optimizes weekly.

4. Admin & Scheduling

Most owners lose 3-5 hours a week here.

- ☐ We schedule jobs and appointments manually.
- ☐ We send reminders to clients by hand (or forget to).
- ☐ Paperwork, invoicing, and reporting eats our office manager's afternoons.
- ☐ We can't go on vacation without things falling apart.

AI fix: AI coworker that books, reminds, drafts, and tracks every recurring task.

5. Customer Service & Repeat Questions

Most owners lose 1-2 hours a week here.

- ☐ We answer the same questions every week.
- ☐ Our team interrupts each other to ask things that have been answered before.
- ☐ We don't have a single place that holds 'how we do things here.'
- ☐ Repeat customers ask us things our website should already answer.

AI fix: AI knowledge base + chatbot that answers your top 50 repeat questions.

6. Quotes, Estimates & Proposals

Most owners lose 2-4 hours a week here.

- ☐ Our estimator is buried writing quotes by hand.
- ☐ We use spreadsheets and copy-paste old proposals.
- ☐ Quotes go out slower than we'd like.
- ☐ We've lost jobs because the quote took too long.

AI fix: AI coworker builds the first draft of every quote from your historical data.

7. Reporting & Profitability

Most owners lose 1-2 hours a week here.

- ☐ We don't know which jobs are most profitable until weeks after they close.
- ☐ We don't get a weekly snapshot of marketing or sales numbers.
- ☐ Our 'reports' are 30-page PDFs nobody actually reads.
- ☐ We make decisions based on gut, not data.

AI fix: Plain-English weekly reports that tell you what worked and what's next.

Add Up Your Checks. Here's What They Mean.

0 to 5 checks

You're in good shape. Don't fix what isn't broken. Bookmark this audit and run it again in 6 months as your business grows.

6 to 15 checks

You're losing 5 to 10 hours a week. One AI install would pay for itself inside 60 days. Start with whichever section had the most checks. That's your highest-leverage fix.

16 or more checks

You're losing 15+ hours a week. This is where most business owners are. You don't need another tool. You need an AI coworker installed inside your business that runs the busywork so you can run the business.

Where to Start First

If you're staring at a wall of checked boxes and don't know what to fix first, here's the order we recommend for most small businesses.

- 1. Lead Response.** Nothing else matters if leads are going cold. Fix this first.
- 2. Follow-Ups.** Most businesses lose 30% of closeable jobs to slow follow-up. Fix this second.
- 3. Admin & Scheduling.** Once leads are handled, get your office manager's afternoons back.

Want a Custom Install Plan?

Book a free 30-minute call with Melissa. We'll walk through your audit results, show you where AI can save you the most hours, and hand you a clear install plan. Even if you never hire us, you walk away with a path.

→ scheduler.zoom.us/melissa-elizondo/30-min-consult

AI coworkers I've installed and run live: Divided Sky Roofing (San Marcos), Vital Welding (New Braunfels), New Braunfels Janitorial, Core Business Insurance, NB IT Solutions, Gruene Insurance Group, CVF Enterprise. HVAC and concrete installs in progress.