ILLUSTRATIVE SAMPLE. Sample Co. is fictional and every figure is made up. It shows the format of a Nexus Advisory AI Workflow Audit.

Sample Co. (fictional)

Illustrative sample: a regional home-services company (roofing and repair). Fictional business, made-up figures. · About 40 people, one office, two crew leads; a CRM and shared drives, no in-house tech team · Central Texas (fictional) · Prepared for Owner and operations manager (fictional)

EXECUTIVE SUMMARY

$13,740

estimated leak per month across 7 workflows

61.6 h

spent per month on these workflows; about 40 h can come back

$12,876

per month addressed by the top 3 fixes

Fix these first. Ranked by monthly impact times how directly I can build the fix.

1

First reply to web and phone inquiries

Speed-to-lead automation

$7,980

high fit

$1,050 to $1,750

0.2 mo

2

Follow-up on sent estimates

Estimate follow-up on autopilot

$4,320

high fit

$1,750 to $2,800

0.5 mo

3

Job status questions from customers and crews

Job desk

$576

medium fit

$3,500 to $6,125

8.4 mo

Estimates use the assumptions listed at the end; each one is labeled and can be corrected in one line.

AI Workflow Audit: $2,500

Fixed price, one week, paid in full before work starts.
What you paid is credited toward a pilot or build you sign within 30 days of the wrap-up call.

Ken Jackson, Nexus Advisory

EVERY WORKFLOW, RANKED BY IMPACT X FIT

First reply to web and phone inquiries

Sales

leads

10

$7,980

high fit

Follow-up on sent estimates

Sales

leads

11.3

$4,320

high fit

Job status questions from customers and crews

Operations

time

16

$576

medium fit

Finding warranty terms, specs and past job files

Operations

time

13.3

$480

medium fit

Monday numbers

Management

time

6

$288

medium fit

Website forms and links

Marketing

time

1

$48

high fit

Payroll and job costing

Finance

time

4

$48

low fit

RECOMMENDED BUILDS

1. Speed-to-lead automation

Fixes: First reply to web and phone inquiries · Sales · high fit

How it runs today

Web form and missed-call inquiries land in a shared inbox. The office manager forwards them to an estimator when she gets to them. *Tools: Website form, Shared inbox, CRM.*

Where it leaks

In the sample, the median first reply is 4 business hours; 9 of 40 inquiries checked had no reply logged at all.

Proposed fix

Every new lead gets an instant first reply, a call task and an alert; one test lead proves each source lands with the right tag.

Why I can build it

CRM automations are work I build every week.

Impact estimate

```
60/mo x 10 min x 1 person = 10 h/mo; 70% recoverable = 7 h x $60/h = $420
60 leads/mo x 3% more won x $4,200 per win = $7,560
Per win: ASSUMPTION: average gross profit per closed job
```

Build option: 6 to 10 hours · $1,050 to $1,750 Pays back in about 0.2 months at the estimate

2. Estimate follow-up on autopilot

Fixes: Follow-up on sent estimates · Sales · high fit

How it runs today

Estimators send quotes from their own email. Follow-up happens when someone remembers. *Tools: Estimating spreadsheet, Email, CRM.*

Where it leaks

In the sample, 22 of 45 open estimates had no follow-up after the first send.

Proposed fix

Each sent estimate starts a short follow-up sequence and a call task; any reply stops it and alerts the estimator.

Why I can build it

Email sequences and CRM tag rules are in my standard toolkit.

Impact estimate

```
45/mo x 15 min x 1 person = 11.3 h/mo; 80% recoverable = 9 h x $60/h = $540
45 leads/mo x 2% more won x $4,200 per win = $3,780
Per win: same per-job value
```

Build option: 10 to 16 hours · $1,750 to $2,800 Pays back in about 0.5 months at the estimate

3. Job desk

Fixes: Job status questions from customers and crews · Operations · medium fit

How it runs today

Customers call the office for status; the office calls or texts the crew lead to find out. *Tools: Phone, Texts, Scheduling board.*

Where it leaks

In the sample, the office logged about 30 status calls a week.

Proposed fix

One page per active job: schedule, materials, open questions and who owes what, pulled from texts, email and CRM notes.

Why I can build it

I build AI agents; the connectors to your email and chat are checked first.

Impact estimate

```
120/mo x 8 min x 1 person = 16 h/mo; 60% recoverable = 9.6 h x $60/h = $576
```

Build option: 20 to 35 hours · $3,500 to $6,125 Pays back in about 8.4 months at the estimate

THE REST

Finding warranty terms, specs and past job files

In the sample, new hires asked the same senior estimator most of these questions.

Ask-the-company assistant

medium fit

30 to 60 hours · $5,250 to $10,500

Monday numbers

In the sample, the sheet was skipped 3 of the last 8 weeks.

Weekly numbers page

medium fit

8 to 14 hours · $1,400 to $2,450

Website forms and links

In the sample, the quote form on the mobile site failed silently.

Monthly website and compliance walk

high fit

4 to 6 hours · $700 to $1,050

Payroll and job costing

Covered by the bookkeeper's tools; named here so nothing is left out.

Refer out

low fit

n/a · Referral

ASSUMPTIONS (CORRECT ANY OF THESE AND THE NUMBERS UPDATE)

- An hour of the team's time is valued at $60 (ASSUMPTION for the sample: loaded cost of one office or estimator hour).
- Build prices use $175/hour. Estimates for Ken to confirm before quoting.
- First reply to web and phone inquiries: 60 inquiries a month
- First reply to web and phone inquiries: A first reply inside 5 minutes wins 3 more of every 100 inquiries
- First reply to web and phone inquiries: $4,200 gross profit per job
- Follow-up on sent estimates: 45 estimates a month
- Follow-up on sent estimates: Consistent follow-up closes 2 more of every 100 estimates
- Job status questions from customers and crews: 120 status questions a month
- Job status questions from customers and crews: 8 minutes each to chase down and answer
- Finding warranty terms, specs and past job files: 40 lookups a month
- Finding warranty terms, specs and past job files: 20 minutes each
- Monday numbers: 90 minutes a week
- Website forms and links: 1 hour a month to check by hand
- Payroll and job costing: 2 payroll runs a month

SOURCES AND METHOD

- Impact = hours recovered x hourly value + leads won back x value per win + direct dollars. Rank = impact x fit (high 1.0, medium 0.6, low 0.2).
- No results are promised. Figures are estimates from the interview and the files below.
- SAMPLE ONLY. This report shows the format of a real AI Workflow Audit. The company, people, tools and figures are invented.
- In a real audit this list names every document, export and interview the findings come from.