

AI READINESS AUDIT · \$297

AI Readiness Audit Sample Report

What an Applied Agency AI audit looks like when it lands in your inbox.

PREPARED FOR (FICTIONAL)

Northstar Heating & Cooling

Novi, MI · ~15 employees · HVAC service & install

INTERVIEW DATE

May 22, 2026

DELIVERED

May 24, 2026

AUDIT LEAD

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SAMPLE

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EXECUTIVE SUMMARY

Where AI fits at Northstar Heating & Cooling.

Northstar runs a tight 15-person service-and-install operation in Novi with ~\$2.2M annual revenue, two dispatch lines, and twelve techs across HVAC, water heater, and IAQ work. The owner and the service manager are the two bottlenecks — every call, every quote, and every customer escalation routes through one of them. That's a ceiling, not a workflow.

We mapped seven candidate automations against the Impact vs. Effort Matrix. **Three Quick Wins** stand out — and every one of them runs on off-the-shelf tools you can set up yourself. The whole package costs roughly **\$280/month in subscriptions** and a weekend of setup for a tech-comfortable team member. Set up in-house, hand the plan to a contractor, or have us build it — the choice is yours, and we lay out all three below.

Conservatively, those three Quick Wins recover **\$4,200–\$6,800 in revenue per month** from missed calls, slow lead response, and dropped follow-ups. Against ~\$280/month in tools, the math isn't close.

The headline finding

Northstar is losing an estimated 9–14 jobs per month before they ever enter the pipeline — invisible in QuickBooks, visible in the call log. A voice agent and a 60-second lead response system close that gap without hiring, without more marketing spend, and without disrupting the techs in the field.

What's in this report

- **1. Business snapshot** — what we heard, in the owner's words.
- **2. Top pain points** — where the hours and the revenue are actually leaking.
- **3. Impact vs. Effort Matrix** — every candidate automation, plotted.
- **4. Top three opportunities** — what to build first, with tools and scope.
- **5. Tool stack recommendation** — specific platforms, by name.
- **6. 7-day implementation plan** — what to start Monday.
- **7. ROI summary** — payback, monthly recovery, year-one math.
- **8. Do not automate yet** — the work that isn't ready, and why.

01 · BUSINESS SNAPSHOT

What we heard during the 45-minute interview.

Headcount	15 — owner, 1 service manager, 1 dispatcher, 12 techs
Revenue	~\$2.2M annual; 60% service, 30% install, 10% maintenance plans
Service area	Novi, Northville, Wixom, Farmington Hills, Commerce Twp.
Inbound volume	~85 calls/wk + ~25 web leads/wk + ~10 referral inbounds/wk
Current tools	ServiceTitan (dispatch + CRM), QuickBooks Online, Google LSA, Gmail, manual SMS
Data hygiene	ServiceTitan well-maintained; tech notes inconsistent; review process manual
Team comfort	Owner = high comfort with tools; dispatcher = moderate; techs = mixed
Past attempts	Tried a chatbot in 2024 (removed — too generic); no automation since
Budget signal	Open to \$5K–\$15K for the right first build; needs payback in 90 days

What the owner said

"I know we're losing calls. I just don't know how many, and I don't know which ones. When my dispatcher's on the other line, the second call goes to voicemail. Half the time, by the time we call back, they've already booked with someone else."

02 · TOP PAIN POINTS IDENTIFIED

Where the hours and the revenue are leaking.

Three of these leaks are pure revenue — money walking out the door before a job ever gets booked. Here's our estimate of what each one costs Northstar every month:



Estimated monthly revenue at risk, by pain point. Ranges reflect seasonal swing (heating season pushes the high end).

A. Missed inbound calls during peak hours

Between 9 AM and 2 PM, the single dispatcher is on call #1 when call #2 lands. Call #2 hits voicemail. Owner estimates 4–7 voicemails/week; an unknown number of callers don't leave one. Revenue impact: estimated 6–10 missed jobs/month at avg ticket \$480 = **\$2,800–\$4,800/month**.

B. Slow response to Google LSA web leads

~25 LSA leads/week. Dispatcher's stated target is a 30-minute callback; actual median is 1.5 hours. By the 90-minute mark, ~35% of leads have booked with a competitor. Revenue impact: estimated 3–4 lost jobs/month = **\$1,400–\$2,000/month**.

C. After-hours emergencies routing to voicemail

Heating emergencies in Jan–Mar and AC failures in Jun–Aug generate after-hours calls. Currently all go to voicemail; owner checks at 7 AM. At least 2 emergencies/month convert to a competitor before Northstar opens. Revenue impact: estimated **\$900–\$1,400/month** in lost emergency premiums.

D. Tech debrief and job notes are inconsistent

Tech notes in ServiceTitan are entered same-day ~60% of the time. Affects warranty claims, follow-up scheduling, and review-request timing. Not a revenue leak — a quality and trust leak.

E. Review requests are manual and sporadic

Owner sends review requests when he remembers. Current Google review velocity: ~1.5/month. Local pack ranking suffers; competitor pulling 4–6/month. Long-term revenue impact, hard to quantify.

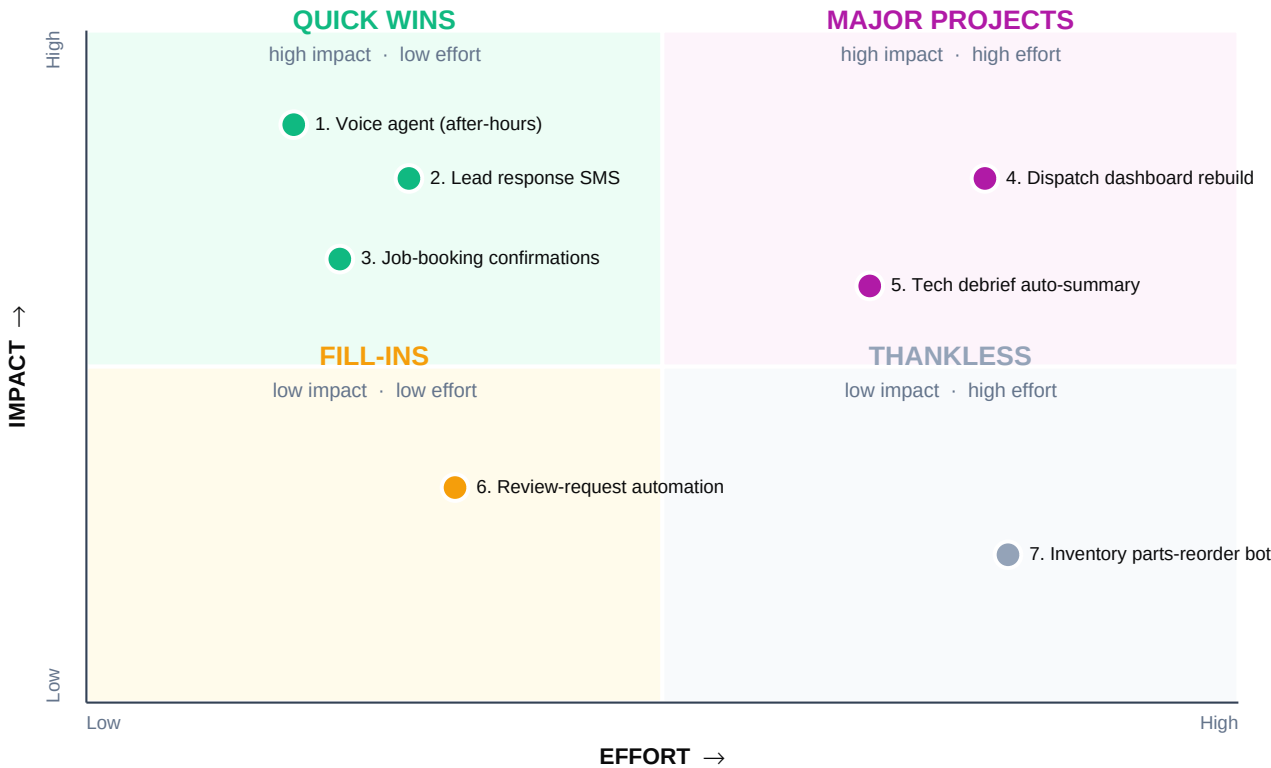
Combined revenue at risk

Pain points A + B + C alone represent **\$5,100–\$8,200 in recoverable monthly revenue** — and those are the three with the cleanest automation path. We address all three in the Quick Wins section.

03 · IMPACT VS. EFFORT MATRIX

Every candidate automation, plotted.

We map every opportunity we identify against two axes: **Impact** (revenue, hours saved, or risk reduced) and **Effort** (build complexity, change management, data prep). The goal is to name what to build first — and just as importantly, what to skip.



- Quick Wins** Ship in 30 days. Highest ROI per dollar.
- Major Projects** Worth doing, but plan and scope deliberately.
- Fill-ins** Run when capacity opens up. Don't lead with these.
- Thankless** Skip. Cost outweighs benefit at your scale.

04 · TOP THREE OPPORTUNITIES

Three Quick Wins you can ship yourself.

These are the three highest-ROI automations for Northstar — and none require custom development. Each runs on off-the-shelf tools with templates and a setup wizard, so a tech-comfortable team member can stand them up over a weekend. Each card shows a realistic do-it-yourself estimate plus what it costs if you'd rather hand it to us. **Doing all three together is the smart play** — they sit on the same plumbing (Twilio, ServiceTitan webhooks, one Make.com account), which is why we group them.

1. Voice agent for inbound calls

QUICK WIN

An AI voice agent picks up call #2 (and #3, and after-hours) on your existing number, collects service address, system type, issue, and preferred window, books straight into ServiceTitan, and texts the dispatcher a brief the moment the call ends.

Off-the-shelf tools: Vapi (or Bland.ai) · ServiceTitan API · Twilio

DO IT YOURSELF

~8-12 hrs **setup** using Vapi's HVAC template + your call script. ~\$180/mo in tools. No code — it's a guided flow builder.

PREFER DONE-FOR-YOU?

We configure, test, and deploy it in ~2 weeks. One-time build: **\$3,000-4,500**.

Success metric: 90%+ of inbound calls handled without the dispatcher. Recover 6-10 jobs/month.

2. 60-second lead response SMS

QUICK WIN

Every Google LSA form submission triggers an automatic text within 60 seconds — acknowledges the request, confirms the details, and asks one question: urgent, or can we schedule? The reply routes to an emergency callback or a booking link.

Off-the-shelf tools: Make.com · Twilio · ServiceTitan webhook

DO IT YOURSELF

~4-6 hrs **setup** with a Make.com template. ~\$60/mo in tools. Drag-and-drop, no developer needed.

PREFER DONE-FOR-YOU?

We build and connect it in under a week. One-time build: **\$1,800-2,500**.

Success metric: Median lead-response time from 90 min to under 60 sec. Recover 2-4 jobs/month.

3. Booking confirmations & day-of reminders

QUICK WIN

Two automatic texts: a confirmation when the job is booked, and a morning-of reminder with the tech's name and a live ETA link. Cuts no-shows and the dispatcher's reminder calls.

Off-the-shelf tools: ServiceTitan automation rules · Twilio · Google Maps ETA

DO IT YOURSELF

~3-5 hrs **setup** — most of this is built into ServiceTitan's native rules already. ~\$40/mo.

PREFER DONE-FOR-YOU?

We turn it on and tune it in a few days. One-time build: **\$1,500-2,200**.

Success metric: No-show rate from ~8% to under 3%. Dispatcher recovers ~3 hrs/week.

05 · RECOMMENDED TOOL STACK

Specific platforms, by name.

Layer	Recommendation	Why this, not the alternative
Voice agent	Vapi (primary) or Bland.ai	Both handle call transfer, structured data capture, and ServiceTitan-style integrations. Vapi has lower latency; Bland is cheaper at volume. Either works.
SMS / telephony	Twilio Programmable Messaging	Already a Northstar vendor for tech notifications. Reuse the existing account; no new contracts.
Orchestration	Make.com (Pro, ~\$29/mo)	Better error handling than Zapier at the volume Northstar will hit. n8n is the self-hosted alternative if you want full data control later — not needed at this scale yet.
CRM / dispatch	ServiceTitan (no change)	Already in place, well-maintained, and supports the webhooks the automations need. No reason to migrate.
Review automation	NiceJob or Podium (later)	Defer. The pain is real but the ROI is lower than the three Quick Wins. Revisit in 90 days.
AI model layer	OpenAI GPT-4o-mini	Cheap, fast, accurate for the urgent-vs-schedulable SMS classification. No premium model needed at this scope.

What we deliberately didn't recommend

No new CRM. No HubSpot. No Salesforce. No custom-trained model. Northstar's ServiceTitan instance is already doing 80% of the work — the AI layer sits on top of it. The cheapest, fastest build is the one that respects the system already in place.

06 · 7-DAY IMPLEMENTATION PLAN

What to start Monday.

This plan assumes Northstar is building the Quick Wins independently or with a contractor. If you engage us for the Implementation Sprint, days 1–7 collapse into our discovery + scoping week — you do nothing operational, we do the prep.

Day 1 — Monday

Owner + service manager: 30-min alignment call. Decide build order (recommended: voice agent → lead response SMS → confirmations). Sign off on platform choices (Vapi or Bland; Make.com).

Day 2 — Tuesday

Dispatcher: pull last 30 days of voicemail recordings + LSA lead timestamps. Owner: pull ServiceTitan report of last-90-day jobs to baseline win rate and ticket size.

Day 3 — Wednesday

Set up Vapi (or Bland) account. Create initial voice-agent flow with placeholder service-address / issue / window questions. No production calls yet.

Day 4 — Thursday

Connect Twilio number to the voice agent. Run 10 internal test calls — owner, service manager, and two techs. Refine prompt for tone and edge cases (water heater vs. furnace vs. AC).

Day 5 — Friday

Build the ServiceTitan booking integration. Confirm calendar writes, dispatcher SMS brief, and after-hours emergency escalation routes correctly.

Day 6 — Saturday

Soft launch: forward call #2 to the voice agent during dispatcher's lunch hour (12–1 PM). Review every call recording at end of day.

Day 7 — Sunday

Owner review. Decide: full launch Monday (all overflow + after-hours), or one more week of soft launch? Recommended: ship Monday. Iterate live.

Week 2 and beyond

Lead response SMS goes live week 2 (smaller build, sits on top of the same Make.com instance). Confirmations + day-of reminders go live week 3. Full Quick Wins package operational by day 21.

07 · EXPECTED ROI SUMMARY

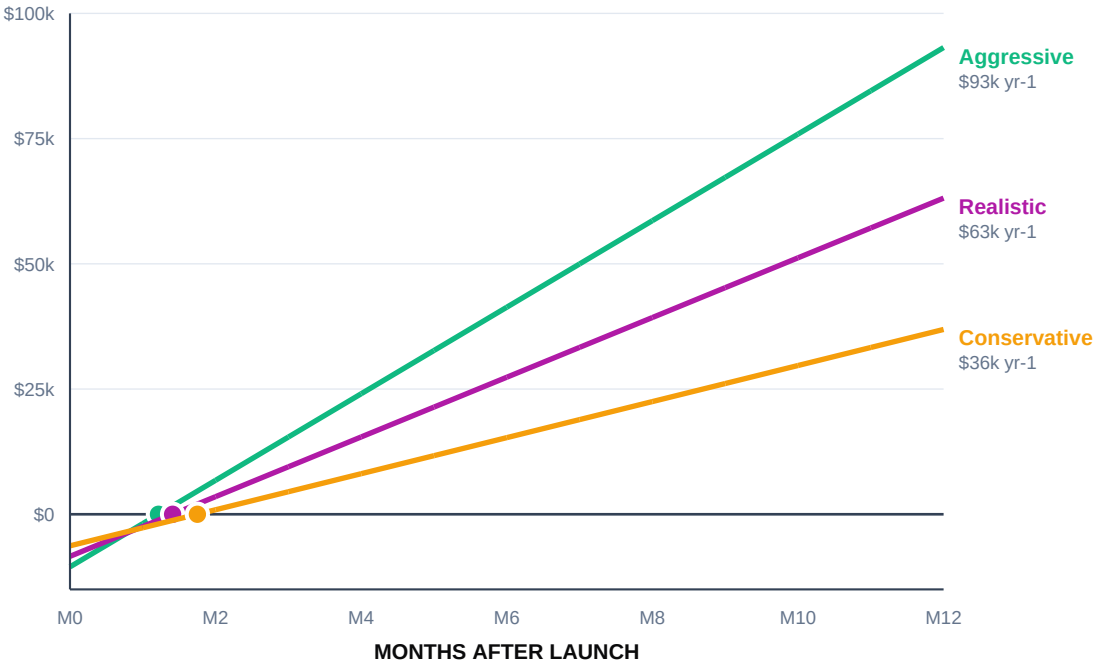
Payback, monthly recovery, year-one math.

Two ways to read this. The **do-it-yourself path** carries almost no build cost — just ~\$280/month in tools and a weekend of your team's time, so it's cash-flow positive in month one. The table below models the more conservative **done-for-you path**, where you pay us a one-time build cost up front. Even on that path, the system pays for itself inside Q1.

	Conservative	Realistic	Aggressive
Done-for-you build (one-time)	\$6,300	\$8,400	\$10,500
Platform fees (monthly)	\$240	\$280	\$320
Recovered jobs / month	8	12	16
Avg ticket recovered	\$480	\$520	\$560
Recovered revenue / month	\$3,840	\$6,240	\$8,960
Net month-one return	-\$2,700	-\$2,440	-\$1,860
Net by end of month 3	\$8,580	\$15,800	\$24,420
Year-one net return	\$37,260	\$63,920	\$94,260
Payback period	~70 days	~45 days	~30 days

How we built these numbers. The Conservative column assumes Northstar recovers only 8 jobs per month at \$480 — well below the 11-job recovery the comparable Novi HVAC operator landed in 30 days (see the published case study). The Realistic column tracks closer to that benchmark adjusted for Northstar's larger ticket size. The Aggressive column assumes the operator works the system — reviewing call logs weekly, refining the voice prompt, and pushing tech ETA visibility into the customer flow.

Cumulative net return — done-for-you path, first 12 months



Each line starts below zero (the one-time build cost) and climbs as recovered revenue compounds. The dot marks break-even. On the do-it-yourself path there's no build cost, so the line starts at ~\$0 and only rises.

Bottom line

Even at the Conservative end, the system pays for itself before the end of Q1 and delivers ~\$37K of net year-one return. The Realistic case is a 7.6× year-one return on the build cost.

08 · "DO NOT AUTOMATE YET" LIST

What to skip — for now.

Saying yes to the right automations is half the value of an audit. Saying no to the wrong ones is the other half. The following are real candidates we considered and deliberately pushed back to a later phase, or off the roadmap entirely.

✗ Full dispatch dashboard rebuild

ServiceTitan's native dashboards are 80% of what you need. Building a custom layer adds cost without moving revenue. Revisit only if growth pushes you past 25 techs.

✗ Tech debrief auto-summary (AI transcription of post-job notes)

Real ROI exists here, but the prerequisite is that techs actually record notes consistently — which they currently don't. Fix the human workflow first (tech-tablet SOP); automate the summary after.

✗ Review-request automation

Will likely make the next audit cycle. Right now, the Quick Wins lift call capture; once revenue is growing, the review velocity becomes the next ceiling and we revisit.

✗ Inventory parts-reorder bot

Classic Thankless quadrant for a 15-person shop. Northstar's parts spend doesn't justify the build cost. The bigger operations problem (truck stock variance) is a process fix, not an AI fix.

✗ Custom-trained AI model on Northstar's call history

Premature. Off-the-shelf models (Vapi + GPT-4o-mini) handle the use case at a fraction of the cost with no training data required. Revisit at 50+ techs.

✗ Replacing ServiceTitan with a 'modern' CRM

Not even close to worth it. ServiceTitan works. Migrating would burn 60 days and several thousand dollars of staff time for no operational lift.

09 · NEXT STEPS

What happens after this report.

We deliver the written report inside 48 hours of the interview. Then we get on a **30-minute review call** together — walk through the findings, answer any questions, and decide what (if anything) happens next. There are four common paths from here:

Path A — Build it yourself

Take the 7-day plan, hire a freelance Make.com / Twilio specialist, ship the Quick Wins in-house. Works well for owners who have technical comfort or an ops manager who can own it.

Path B — Hire a contractor from our spec

The tool stack and scope are specific enough that you can get fixed-price bids from any qualified no-code or automation freelancer. The report is the spec.

Path C — Engage us for the build (AI Implementation Sprint)

We take the audit output and ship it. The Quick Wins package builds and deploys in a 4-week sprint; the \$297 audit fee is credited toward the sprint. Fixed scope, fixed price.

Path D — Hold for now

If the report surfaces prerequisites that aren't ready (tech-tablet SOP, data hygiene, internal owner), the right move is to fix those first. We'll tell you that out loud, not bury it.

What we won't do

We won't pressure a decision on the 30-minute review call. We won't auto-enroll Northstar in anything. And we won't recommend a build we don't think pays back. If the answer is "hold," that's a successful audit — you just saved \$8K on a sprint that wasn't ready to ship.

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Named tools, scoped projects, real ROI math — not strategy decks.

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