

AI BUSINESS AUDIT

# WHERE IS YOUR BUSINESS BLEEDING MONEY?

A straight-to-the-point diagnostic to help you find the 5 most common places businesses waste money — and 5 automation ideas to fix it.

## THE DIAGNOSTIC

# 5 Areas Where Businesses Lose Money

Answer honestly. If you're nodding along to more than two of these, you have a real problem — and a real opportunity.

## AREA 01

## Manual Data Movement

"Does anyone on your team copy information from one place and paste it into another — more than once a week?"

## LOOK FOR

- Pulling data from forms into your CRM manually
- Retyping invoice info into spreadsheets
- Exporting reports and reformatting them in Excel
- Moving leads from one tool to another by hand

**Estimated Bleed:** 3–7 hours/week per person doing it. At \$25/hr that's \$300–\$700/month per employee — for work a \$20/month Zapier account could handle.

Someone on my team moves data manually on a regular basis.

## AREA 02

## Lead Follow-Up Gaps

"If someone fills out your contact form at 9pm on a Friday, what actually happens?"

## LOOK FOR

- No auto-response beyond a generic "we'll be in touch"
- Follow-up dependent on one person checking their email
- Leads sitting uncontacted for 24+ hours
- No defined sequence after the first touchpoint

**Estimated Bleed:** Response within 5 minutes = 9x higher conversion. Every lead that waits 24 hours is a lead shopping your competitor.

Our lead follow-up depends on a human remembering to respond — there's no automated sequence in place.

## AREA 03

## Repetitive Customer Support Questions

"Pull up your last 50 support emails or DMs. How many of them ask the same 8–10 questions?"

## LOOK FOR

- "What's included in your service?" — answered daily
- "How long does it take?" — answered daily
- "Can I get a refund?" — answered daily
- Pricing questions you field individually every single time

**Estimated Bleed:** 1 hour/day on repetitive support = \$6,000–\$12,000/year in labor answering questions you've already answered a thousand times.

More than 30% of our support volume is the same questions repeating.

## AREA 04

## Content Production Bottlenecks

"How long does it take from 'we should post about this' to something actually going live?"

## LOOK FOR

- Blog posts that take 4+ hours to write from scratch
- Social posts requiring 3 rounds of approval
- Video content that never gets repurposed into anything else
- Newsletters skipped because "nobody has time this week"

**Estimated Bleed:** Inconsistent content = inconsistent audience growth = inconsistent leads. The cost isn't just labor — it's the compounding opportunity cost of not showing up.

We regularly skip or delay content because it takes too long to produce.

## AREA 05

## Unused or Unread Data

"When did someone on your team last make a business decision based on data — not gut instinct?"

## LOOK FOR

- Google Analytics nobody logs into
- A CRM with pipeline data that never gets reviewed
- Email open/click rates you track but don't act on
- Customer feedback sitting in a spreadsheet from 6 months ago

**Estimated Bleed:** Hard to quantify — but every bad decision made without available data costs real money. Wrong hires, wrong offers, wrong channels.

We have dashboards or reports that nobody looks at consistently.

**Done with the diagnostic?** Count how many boxes apply to your business. Every check mark is a real dollar amount leaving your business every single week — not a hypothetical. The good news: none of these require a developer, a big budget, or months of work. **Turn the page to see your score — and what to do next.**

## YOUR RESULTS

# What Your Score Actually Means

Count the boxes you checked. Here's the honest read on where you stand.

**0-1 Checked****You're ahead of most.**

Your operations are tighter than the average business your size. A few targeted automations and you'll be genuinely running lean. Focus on compounding what's already working.

**2-3 Checked****Real inefficiencies. Real money out the door.**

You're losing time and revenue every week on things that are fully fixable. Each area you checked is costing you hundreds to thousands per month — and the fix is closer than you think.

**4-5 Checked****You're actively bleeding. Stop the clock.**

This isn't a future problem — it's happening now. The silver lining: every single one of these is fixable, most in a single weekend, with tools that already exist. You don't need to fix all five at once. Pick the one costing you the most and start there.

WANT TO ACTUALLY FIX IT?

## The Level 2 AI Automation Playbook

This audit told you where you're bleeding. The Level 2 Playbook tells you exactly how to stop it — with step-by-step build guides, copy-paste templates, tool configs, and screenshots for every automation above. No developer needed. No guessing. Just build it and ship it.

**Coming soon...**

## THE FIX

# 5 Automation Ideas Worth Stealing

These aren't theoretical. Each one maps directly to a bleed area above — and each can be built in a weekend or less.

## 01 Instant Lead Response Bot

The moment someone submits a form, an AI-drafted, personalized email goes out — references what they asked about, sets expectations, and optionally books a call. No human required.

**TOOLS:** Make.com + Claude/ChatGPT + your CRM | **SETUP:** ~3 hours | **FIXES:** Area 02

## 02 FAQ Chatbot Trained on Your Content

Feed it your website, your service docs, your top 50 support emails. Deploy it on your site. It handles Tier 1 support 24/7 — without a human ever getting pulled in.

**TOOLS:** Voiceflow, Botpress, or Claude-powered widget | **SETUP:** A weekend | **FIXES:** Area 03

## 03 Content Repurposing Pipeline

Record a video or write one post → automation strips the transcript → AI turns it into 3 social posts, 1 email, and 5 short clips. One piece of content does 10x the work.

**TOOLS:** Zapier + Claude/ChatGPT + your scheduler | **SETUP:** ~4 hours | **FIXES:** Area 04

## 04 Auto-Generated Weekly Business Recap

Every Monday at 7am: revenue last week, leads in pipeline, top support issues, content performance — summarized in plain English, delivered to your inbox. No analyst required.

**TOOLS:** Make.com + your existing data sources | **SETUP:** ~4 hours | **FIXES:** Area 05

## 05 Onboarding Sequences (Client or Employee)

New client signs? Trigger a 7-day automated sequence: welcome email, what to expect, how to reach you, milestone check-ins. New hire starts? Same idea. Zero manual coordination.

**TOOLS:** ActiveCampaign, ConvertKit, or any email automation | **SETUP:** ~3 hours | **FIXES:** Area 01

NEXT STEP

# READY TO STOP THE BLEED?

## FOLLOW ALONG

Each week I share my startup tests and AI workflows — real experiments, real results. No fluff.

[BuildIncomeStreams.com](https://BuildIncomeStreams.com) →

## NEED SOMETHING BUILT?

We build AI automations and custom workflows for businesses ready to stop doing things manually.

[EraseFriction.com](https://EraseFriction.com) →

## SEE WHAT I'M BUILDING IN REAL TIME



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