AI OPPORTUNITY AUDIT · SAMPLE REPORT

Coastline Comfort Air & Plumbing

A fictional 15-person HVAC and plumbing contractor in Broward County, used to show exactly what a Brain Recon audit delivers. Every company detail, name and figure in this sample is invented for illustration.

15 staff	$750	6	9 days
Tier: 5 to 25	Audit fee	Qualifying opportunities	Intake to delivery

This is a sample. Coastline Comfort does not exist. Real reports follow this structure, use your own measurements and your team's names, and are delivered as a signed PDF with a walkthrough call.

01 Summary

Coastline's office staff spend about **17.5 hours a week** on work that follows the same steps every time: returning missed calls, typing quotes from technician notes, keying supplier invoices, confirming appointments, asking for reviews and sorting the shared inbox. All six can be automated in tools Coastline already pays for or can add for under $300 a month combined.

17.5 hrs	~$29K	<$300/mo	4
per week identified	labor value per year, est.	new software, all six	quick wins live in 2 weeks

Labor value uses a fully loaded office cost of $35/hour over 48 working weeks. Revenue upside from faster lead response and more reviews is noted per opportunity but not included in the total.

02 How opportunities are scored

Each opportunity meets all four parts of the guarantee definition: a named owner, a measured burden, a specific intervention with a named tool, and a score. Scores run 1 to 5, where 5 is best, and add up to a priority out of 15.

FACTOR	WHAT A 5 MEANS	WHAT A 1 MEANS
Impact	Saves 4+ hours a week, or protects revenue directly	Saves under 1 hour a week
Cost	Uses software already paid for, or under $50/month	Over $500/month or a custom build
Ease	Live in days with no change to how the team works	Months, new systems, retraining

03 Ranked opportunities

#	OPPORTUNITY	OWNER	HRS/WK	PRIORITY
1	Missed-call text-back and after-hours lead capture	Office manager	3.0	14/15
2	Appointment confirmations and reminders	Dispatcher	2.0	14/15
3	Review requests after completed jobs	Office manager	1.5	13/15
4	Supplier invoice entry into QuickBooks	Bookkeeper	3.0	13/15
5	Quote drafting from technician notes	Service manager	5.0	12/15
6	Shared inbox sorting and draft replies	Office manager	3.0	11/15

04 Opportunity detail

01 Missed-call text-back and after-hours lead capture

Impact 5 · Cost 5 · Ease 4 = 14

OWNER
Office manager

CURRENT BURDEN
About 30 missed calls a week (call log, 2 weeks); 3 hrs/wk calling back, and some callers book a competitor first

INTERVENTION
Auto-text every missed call within one minute with a booking link; log the lead in the job system

NAMED TOOLS · COST
Phone system's missed-call text-back, or Twilio + Zapier into Housecall Pro · about $40/mo

1. Turn on text-back with an approved message.
2. Route replies to the shared inbox and job board.
3. Track missed calls that become booked jobs for 30 days.

02 Appointment confirmations and reminders

Impact 4 · Cost 5 · Ease 5 = 14

OWNER
Dispatcher

CURRENT BURDEN
2 hrs/wk confirming next-day jobs by phone; about 3 no-shows a month

INTERVENTION
Automatic text confirmation at booking, reminder the day before, and "on the way" text with technician name

NAMED TOOLS · COST
Housecall Pro built-in automations · already included in Coastline's plan

03 Review requests after completed jobs

Impact 4 · Cost 4 · Ease 5 = 13

OWNER
Office manager

CURRENT BURDEN
1.5 hrs/wk asking for reviews when someone remembers; review count has stalled

INTERVENTION
Text a review link two hours after a job is marked complete; route unhappy replies to the owner instead of Google

NAMED TOOLS · COST
Housecall Pro review requests, or NiceJob · $0 to $75/mo

04 Supplier invoice entry into QuickBooks

Impact 4 · Cost 5 · Ease 4 = 13

OWNER
Bookkeeper

CURRENT BURDEN
3 hrs/wk keying about 60 supplier invoices a week; occasional duplicate payments

INTERVENTION
Forward invoices to a capture inbox; line items extracted, coded and matched to jobs for one-click approval

NAMED TOOLS · COST
Dext + QuickBooks Online · about $35/mo

1. Set up a capture inbox and forward supplier invoices to it.
2. Map suppliers to QuickBooks accounts and jobs once.
3. Approve matched invoices in one click; review duplicates flagged.

05 Quote drafting from technician notes

Impact 5 · Cost 4 · Ease 3 = 12

OWNER
Service manager

CURRENT BURDEN
5 hrs/wk turning photos and voice notes into written quotes; quotes go out a day after the visit

INTERVENTION
Technician records a 60-second voice note; AI drafts the quote in Coastline's template with line items from the price book; the service manager approves

NAMED TOOLS · COST
ChatGPT Team or Claude Team + Zapier + Housecall Pro estimates · about $90/mo

RECOMMENDED FIRST BUILD · HUMAN APPROVES EVERY QUOTE

06 Shared inbox sorting and draft replies

Impact 3 · Cost 5 · Ease 3 = 11

OWNER
Office manager

CURRENT BURDEN
3 hrs/wk reading, labeling and answering routine emails (hours, service area, warranty questions)

INTERVENTION
Label and route incoming email automatically; draft replies to routine questions for one-click send

NAMED TOOLS · COST
Gmail + Zapier with an AI step · about $30/mo

05 Roadmap

Weeks 1–2	Quick wins Coastline can switch on itself: #2 confirmations, #3 review requests, #1 missed-call text-back, #4 invoice capture. Expected: about 9.5 hours a week back.
Weeks 3–4	First build: #5 quote drafting. One workflow, two-week sprint. The audit fee is credited to the build.
Month 2	#6 inbox sorting, by Coastline or as part of an Ongoing Partnership.
Day 30 check	Compare against the starting numbers above: hours per task, quote turnaround time, missed calls booked, reviews per month.

06 Assumptions and limits

- Hours come from a 5-day log kept by each owner, plus system data such as the call log; dollar values use $35/hour fully loaded.
- Software prices are vendor list prices at the time of the audit and should be confirmed before purchase.
- Estimates are not guarantees of results. They depend on adoption and on how consistently the steps are followed.
- No recommended vendor pays Brain Recon a commission or referral fee.

Prepared and signed by Brain Recon

Delivered to: Owner, Coastline Comfort (fictional)