



AI Tools Assessment

Practical AI opportunities to save time, reduce friction, and grow revenue

Where the biggest opportunity is

Based on our assessment, the biggest opportunity for you is reducing manual admin, improving response speed, and systemising internal knowledge. These changes could free up **6–10 hours per week** while improving consistency and customer follow-up.

Top 3 Business Bottlenecks

Manual admin, slow response speed, and undocumented internal knowledge

Estimated Hours Wasted

6–10 hours per week lost to repetitive, manual, and unstructured work

Biggest AI Opportunities

Email drafting, meeting notes, CRM follow-up, and internal knowledge systems

Expected Financial Impact

Strong monthly ROI compared with the one-off cost of the assessment

Recommended Next Step

Implement the top 1–2 quick wins this week and assign clear ownership

What this assessment covered



Calendar and Meeting Load

Reviewing how time is allocated across meetings and scheduled commitments



Inbox and Communication Flow

Assessing volume, repetition, and response patterns across email and messaging



Repetitive Admin Tasks

Identifying manual, copy-paste, and low-value tasks consuming team time



Sales / Service Workflow

Mapping the end-to-end process from lead to delivery and follow-up



Internal Knowledge and Handovers

Understanding how information is stored, shared, and transferred between people



Reporting / Follow-Up Process

Evaluating how outcomes are tracked, reported, and acted upon

Current workflow friction

The following areas represent the most significant sources of friction identified during the assessment:

Area	Current Issue	Impact
Inbox	Too many repetitive replies	Delays + distraction
Admin	Manual copy/paste between tools	Time loss
Sales follow-up	No consistent process	Missed revenue
Knowledge	Info lives in people's heads	Rework

The real issues are not "lack of AI"

Before introducing any tools, it's important to understand the underlying problems. AI will not fix a broken process — it will only accelerate it.

No Clear Workflow

Tasks are handled ad hoc with no defined steps or ownership

Too Much Manual Handling

People are doing work that could be automated or templated

Poor Handover Between Tools

Data and context is lost when moving between systems

Repetitive Communication

The same messages, answers, and updates are written from scratch repeatedly

No Prioritisation System

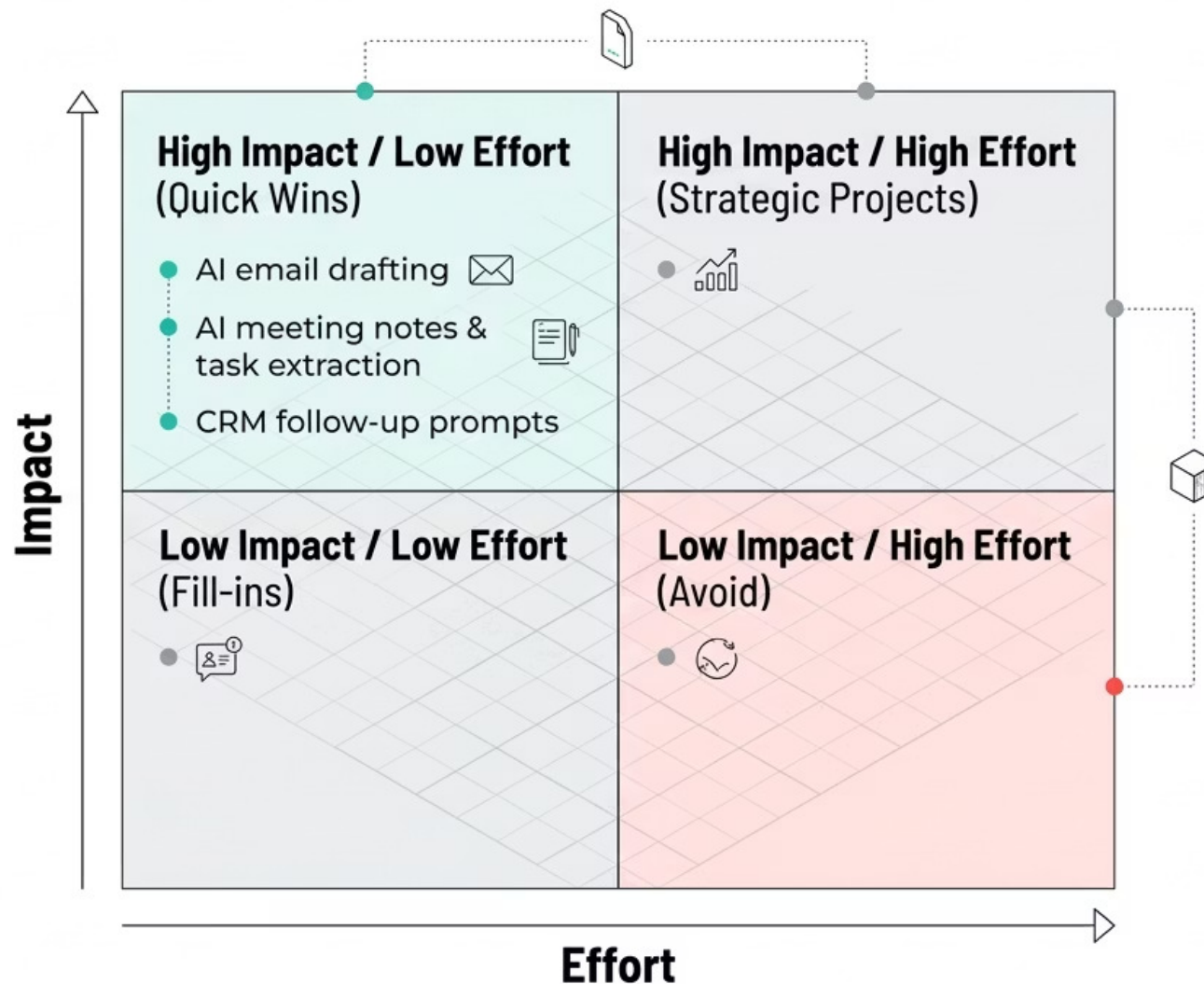
Everything feels urgent, so nothing gets the right level of attention

Knowledge Not Documented

Critical information exists only in people's heads, creating dependency and risk

What to do first

Use this priority matrix to decide where to focus your energy. Start in the top-left quadrant — **high impact, low effort** — for the fastest return.



- Typical quick wins: **AI email drafting**, **AI meeting notes and task extraction**, **CRM follow-up prompts**, and an **Internal SOP assistant** — all sit in the high impact / low effort quadrant.

5–7 practical opportunities

For each recommendation below, we have outlined the tool or system, what it solves, why it fits this business, estimated time saved, estimated cost, and ease of implementation.

1	AI Meeting Notes + Action Tracking • What it solves: Missed actions and poor follow-up • Suggested tools: Fathom / Fireflies / Otter + task workflow • Expected impact: 1–2 hours saved weekly • Estimated cost: Low • Priority: High
2	AI Email Drafting • What it solves: Time lost writing repetitive replies • Suggested tools: ChatGPT / Claude with saved prompts • Expected impact: 1–2 hours saved weekly • Estimated cost: Low • Priority: High
3	CRM Follow-Up Prompts • What it solves: Inconsistent sales follow-up and missed revenue • Suggested tools: HubSpot AI / workflow setup • Expected impact: Improved conversion rate • Estimated cost: Low–Medium • Priority: High
4	Internal SOP Assistant • What it solves: Knowledge living in people's heads, causing rework • Suggested tools: Notion / Guru / HubSpot KB • Expected impact: Reduced onboarding time and repeat questions • Estimated cost: Low • Priority: Medium–High
5	Workflow Automation • What it solves: Manual copy/paste between tools • Suggested tools: Zapier / Make • Expected impact: 1–3 hours saved weekly • Estimated cost: Low–Medium • Priority: Medium

Suggested stack

The following tool recommendations are based on the specific needs identified during the assessment. Each has been selected for simplicity, cost-effectiveness, and fit with this business.

Need	Recommended Tool	Why
Meeting capture	Fathom	Simple and accurate
Internal AI assistant	ChatGPT Teams / Claude	Fast drafting and thinking
Workflow automation	Zapier / Make	Connect tools without dev
CRM follow-up	HubSpot AI / workflow setup	Improves conversion
Knowledge base	Notion / Guru / HubSpot KB	Reduces repeat questions

What to do first this week

A focused 4-day sprint to get the highest-priority changes in place quickly, without disrupting existing operations.

1

Day 1

- Set up the 1–2 highest-priority tools
- Define the first workflow to improve

2

Day 2

- Implement one quick-win automation
- Create one reusable prompt or SOP

3

Day 3

- Test with real work
- Refine based on friction

4

Day 4

- Lock in process
- Assign ownership
- Measure impact

What this could be worth

Financial Impact Model

Metric	Estimate
Hours saved per week	6
Value per hour	\$100
Weekly value created	\$600
Monthly value created	\$2,400
Estimated tool cost	\$40/month
ROI	Very high

Plain-English Summary

Even modest implementation could generate a strong monthly return compared with the one-off cost of the assessment.

\$2,400

Monthly Value

Created from time saved

\$40

Tool Cost

Estimated per month