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Sample AI Audit One-Pager: "Example Heating & Air Co."

Snapshot. Fictional HVAC company in a small Arizona town. 6 people: owner, office manager, 4 field techs. Residential repair, replacement, and maintenance. The owner sells and does estimates; the office manager answers phones, schedules, and invoices. Tools: phone line, a scheduling app, accounting software, paper job tickets.

Top 3 leaks (stated in the example interview)

1. **Missed calls in peak season.** Calls come in while the office manager is on another line, and callbacks happen hours later.
2. **Invoices typed twice.** Techs write paper tickets; the office manager re-types them into accounting.
3. **No review or follow-up routine.** The owner calls past customers for reviews and maintenance only when there's time.

Opportunity matrix

#	Opportunity	Impact	Effort	Plan fit
O1	Text missed callers right away	High	Low	Summit \$597/mo: "Missed Call Text Back"
O2	Tickets to invoices without re-typing	Medium	Medium	Possible: "Invoicing" (Base Camp card, included in Summit); else set up existing tools
O3	Review requests + past-customer outreach	Medium	Low	Summit \$597/mo: "Automated Google Review Requests"; "Database Reactivation Campaigns"

ROI (illustrative): hours saved/wk × wage × weeks/yr

#	Task	Hrs/wk now → after	× Wage	× Weeks	= Labor \$/yr	+ Revenue \$/yr
O1	Calling back missed calls	4 → 2 (2 saved)	\$22	50	\$2,200	12 jobs × \$300 = \$3,600
O2	Re-typing invoices	5 → 2 (3 saved)	\$22	50	\$3,300	n/a
O3	Review and follow-up calls	3 → 1 (2 saved)	\$40	48	\$3,840	n/a
	Total	7 hrs/wk saved			\$9,340	\$3,600

Potential value \$12,940/yr – Summit plan \$7,164/yr = **\$5,776/yr net (illustrative)**. Against a \$5,000 Team audit, payback would be about 10 months *if* these example inputs held. In a real audit, every input comes from the client, and anything they don't state is marked MISSING.

30 / 60 / 90

- **Days 1–30:** Measure baseline call, invoice, and follow-up hours. Turn on Missed Call Text Back (Summit).
- **Days 31–60:** Check whether the plan's Invoicing replaces re-typing; if not, connect the existing apps. Check that callbacks are being logged.
- **Days 61–90:** Start Automated Google Review Requests and a Database Reactivation Campaign (Summit). Re-measure against baseline and update the ROI table.

Plan note: Summit includes "Everything in Ascent," so the "AI Voice Agent Answers Your Calls" is available if the owner wants calls answered live. Voice is billed at about \$0.18/min on top (no minutes included) and is not counted above. Plan features quoted from the aipeakbiz.com plan cards.

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