

\$149 AI AUTOMATION AUDIT - REPRESENTATIVE SAMPLE

Website & Workflow Automation Audit

This sample shows the kind of practical review a paid Campbell Automations audit produces. A real report is generated for the customer's public website and intake details after Stripe checkout.

SAMPLE SCORE

64

Good demand signals, but weak urgency capture and no visible stale-lead recovery.

Executive Summary

The sample business has clear contact paths and enough visible service demand to justify automation work. The largest gaps are not fancy AI features. They are operational: incomplete intake data, slow-response risk, no visible missed-call recovery, and no stale-opportunity workflow.

What The Audit Checks

- 01 Conversion and lead capture**
Calls to action, form fields, booking paths, phone visibility, mobile friction, and clarity of the next step.
- 02 Contact and booking flow**
How quickly a visitor can move from interest to contact, appointment, quote, or qualified intake.
- 03 Follow-up gaps**
Signals that new leads, missed calls, quote requests, stale opportunities, or review requests may fall through manual cracks.
- 04 CRM and intake readiness**
Whether the visible intake path collects enough structured information to trigger useful automations later.

Sample Findings

01 Lead capture gap

The contact path collects basics, but misses service type, urgency, preferred contact method, and location routing. A practical first build is a shorter qualified-intake form that stores these fields in the CRM.

02 Follow-up risk

There is no visible promise or workflow for what happens after a form submission, missed call, or quote request. The audit would recommend owner alerts and a two-touch same-day follow-up sequence.

03 Booking friction

The visitor can contact the company, but appointment readiness is unclear. If bookings are accepted, a booking link or request-a-time option should be made visible near high-intent calls to action.

04 Review opportunity

If the business depends on local trust, completed work should trigger review requests, private recovery routing for unhappy customers, and a simple unanswered-review queue.

Top 5 Recommended Automations

1. Qualified Intake Capture

Replace generic contact notes with structured fields for service type, urgency, source, location, and preferred contact method.

2. Two-Hour Lead Alert

Alert the owner or intake lead when a new inquiry has not been marked contacted within two business hours.

3. Stale Opportunity Recovery

Send a same-day reminder and next-morning follow-up when a quote or booking request remains unresolved.

4. Review Request Workflow

Trigger a review request after completed work and route negative feedback to a private recovery path first.

5. Weekly Lead Leakage Report

Summarize new leads, contacted leads, unresolved requests, missed calls, and review requests in one weekly view.

Implementation Note

Start with simple workflow reliability before adding AI drafting or routing logic. Better inputs make later AI safer and more useful.

30-Day Roadmap

01 Week 1 - Intake cleanup

Define the minimum fields needed to route and follow up on leads. Add those fields to the public form or CRM intake record.

02 Week 2 - Speed-to-lead alerts

Create a simple alert when a new lead has not been contacted within two business hours. Track owner response and exceptions.

03 Week 3 - Stale lead recovery

Add same-day and next-morning follow-ups for unresolved inquiries. Keep the copy short, direct, and easy to reply to.

04 Week 4 - Review and reporting loop

Add post-completion review requests and a weekly leakage report so missed opportunities are visible without manual digging.

Sample Caveats

The paid audit uses public website pages and customer-provided intake only. It does not log into private systems. Recommendations are practical implementation guidance and do not guarantee revenue, rankings, savings, or business outcomes.

Order the paid audit for a site-specific PDF roadmap at audit.campbellautomations.com/automation-audit.