

OWNER SELF-AUDIT

Find the leaks before buying the AI build

Use this checklist to inspect response speed, missed calls, CRM handoff, follow-up, reporting, and ownership. The first AI workflow should sit closest to revenue.

5m

RESPONSE
TARGET

6

LEAK
AREAS

1

FIRST
WORKFLOW

1

Capture

Calls, forms, chat, and email stop living in separate places.

2

Route

AI qualifies urgency and alerts the right owner.

3

Follow up

The prospect gets a useful response before the lead goes cold.

Best first build

Missed-call rescue + instant form follow-up + CRM task + owner summary.

Score each leak area

Mark every gap that is missing, slow, manual, unclear, or owned by memory instead of a system.

1. Response speed

- ✓ Every lead gets an answer in under 5 minutes
- ✓ After-hours inquiries get a useful reply
- ✓ Urgent leads are escalated

2. Missed-call path

- ✓ Voicemail is not the default workflow
- ✓ Caller details are captured
- ✓ Callback task is created automatically

3. Website forms

- ✓ Forms ask for the right details
- ✓ Thank-you page guides the next step
- ✓ Lead source is tracked

4. CRM handoff

- ✓ Lead record is created
- ✓ Stage, source, owner, and urgency are visible
- ✓ Duplicates are handled

5. Follow-up loop

- ✓ Email/SMS continues after first contact
- ✓ Quote reminders exist
- ✓ Staff knows the next action

6. Reporting

- ✓ Owner sees calls, forms, bookings, and gaps
- ✓ Manual admin time is visible
- ✓ AI changes are measured

Interpret the result

Pick the first workflow by revenue risk, not by what looks most impressive.

0-2

Low risk

Optimize the next workflow and keep monitoring.

3-5

Moderate leak

Build follow-up, CRM hygiene, and reporting fixes.

6+

Critical leak

Prioritize missed-call rescue, instant response, CRM task, and owner summary.

Recommended first AI build

Missed-call rescue + instant form follow-up + CRM task + owner summary.

Keep human approval

AI collects, summarizes, routes, drafts, and notifies. Staff still approves pricing, sensitive promises, refunds, and policy changes.

Make the first win measurable

Track speed-to-lead, recovered calls, booked appointments, complete CRM records, and admin time saved.

Book the scan

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