

 WEBSITE-THEME SAMPLE REPORT

Lead Leak Scan + AI Build Plan

A clean sample of what a business receives after Santi Ventures reviews lead capture, missed calls, CRM handoffs, follow-up speed, competitors, automation opportunities, and the first workflow worth building.

Score
READINESS

30d
BUILD
PATH

Ops
APPROVAL
GATES

1 Lead path

Find gaps from call/form to first useful response.

2 CRM + follow-up

Confirm owners, stages, reminders, and missing fields.

3 Competition

Show where buyers already expect better automation.

No magic. Just workflow.

AI sits behind the process, not on top of a broken one.

Fast clarity before money goes into a build

The report turns scattered symptoms into one clean first automation target.

SALES LEAK

Slow lead response

Website forms and missed-call leads wait until staff manually checks messages.

WEAK HANDOFF

Lead intake + follow-up

First workflow should capture inquiry, qualify need, and trigger a task.

AI FIT

High practical value

Repetitive, time-sensitive workflow with measurable upside.

Diagnostic answers

- ✓ Where leads are leaking now
- ✓ Which workflow to build first
- ✓ What can be automated safely
- ✓ What needs human approval

Recommended first move

Build one client-owned lead workflow before broad AI transformation.

Start with missed-call rescue + form follow-up + CRM task + owner summary.

AREA	RISK	FIX	PRIORITY
Phone	After-hours calls hit voicemail	Voice AI lead shield	HIGH
Website	Contact requests wait	Instant response path	HIGH
CRM	Manual source tracking	Fields + automation	MED

Scorecard shows where the first build should start

The score tells the owner what should be fixed first and what should wait.

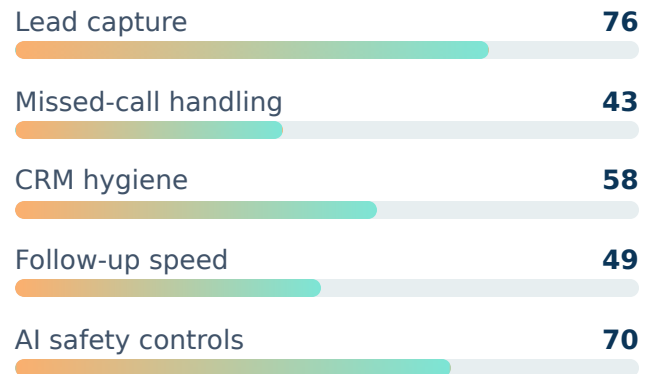
Overall readiness

67 / 100

Good enough to build one focused workflow now. Not ready for broad multi-agent scale until CRM fields, call tracking, and owner gates are tightened.



Category scoring



Meaning

The score does not need to be perfect. It needs to expose the first build that creates measurable business value.

The first build turns scattered lead handling into one clean path

Keep the system narrow enough to test, hand off, and improve.

Before

- ✓ Lead details live in calls after hours
- ✓ Staff checks inbox or voicemail later
- ✓ Details get copied into CRM manually
- ✓ Follow-up depends on memory
- ✓ Owner has no clean visibility

After

- ✓ AI captures request and urgency
- ✓ CRM record and source updates instantly
- ✓ Calendar route or callback task created
- ✓ Prospect receives immediate response
- ✓ Owner gets summary and status

Workflow map

Website / phone

Form, call, chat, missed call



AI intake layer

Qualify, summarize, route



Business tools

CRM, calendar, SMS, dashboard

Human approval gates

AI can collect, summarize, route, draft, and notify. Staff still approves pricing changes, edge-case commitments, refunds, legal/medical claims, and policy changes.

30-day implementation path

A tight launch path beats a broad AI wish list.

1

Map

Confirm tools, inboxes, CRM fields, call flow, and boundaries.

2

Build

Connect intake to CRM, calendar, alerts, follow-up, summaries, and reporting.

3

Launch

Test real scenarios against bad, late, vague, duplicated, and after-hours cases.

4

Optimize

Review response speed, booked calls, failed automations, and staff workflow.

Build deliverables

- ✓ Workflow diagram
- ✓ AI prompt and routing logic
- ✓ CRM/calendar/form connections
- ✓ Testing script and launch checklist
- ✓ Owner manual and maintenance plan

Success metrics

- ✓ Speed to first response
- ✓ Missed calls recovered
- ✓ Leads with complete CRM records
- ✓ Appointments booked
- ✓ Manual admin hours reduced

Client-owned setup

The business should own the accounts, workflows, documentation, prompts, and reporting path after launch.

 **FROM DIAGNOSTIC TO BUILD**

What happens after the diagnostic

1

FIX CTA, SOURCE TRACKING, FORM PATH, AND MISSED-CALL FOLLOW-UP.

2

LAUNCH ONE LEAD INTAKE, CRM UPDATE, AND OWNER-ALERT WORKFLOW.

3

MOVE INTO AI OPS: SUPPORT, MONITORING, AND MONTHLY IMPROVEMENTS.

The diagnostic should make the buyer feel: “Now I know exactly what is leaking, what AI can fix, and what to build first.”

Santi Ventures keeps the promise practical: screenshots, competitor references, analytics, and exact workflow diagrams before a business spends big.