

PREPARED EXCLUSIVELY FOR CLIENT

# AI Readiness Audit & Implementation Roadmap

*Kevin, the single task eating the most time in your business — PowerPoint creation — has a direct AI solution that works inside Microsoft 365, which you're already paying for. Here's how to get those hours back, starting Monday.*

**5**

OPPORTUNITIES  
FOUND

**6–9**

HOURS BACK PER  
WEEK

**\$20**

TOOL COST PER  
MONTH

**4 days**

TO FIRST RESULTS

**Kevin Mullikin**

Professional Services · 2–5 Employees

**William Gould**

AI Readiness Audit · [getiaudit.ai](https://getiaudit.ai)

April 12, 2026

## WHAT YOU TOLD US

## Here's What We Heard

You're running a 2–5 person professional services operation built around client presentations and sales pipeline development. Your days are largely spent on email, PowerPoint creation, and meetings — with a growing pipeline of pursuits that haven't yet converted to closed business. You're already using AI (ChatGPT, Copilot, Gemini) for emails, documentation, and image creation, which puts you ahead of most at your stage.

The two areas where you're losing the most time — and where the right tools would have the biggest impact — are presentation creation and meeting documentation. Both have solutions available inside your existing Microsoft 365 subscription.

## YOUR TOP PAIN POINTS (FROM YOUR INTAKE)

- 1 PowerPoint creation**

"PowerPoint slide making" and "Presentations and PowerPoints" — identified as both the biggest time drain and the primary bottleneck. Building decks from scratch for each pursuit is eating hours that should go to sales activity.
- 2 Sales pipeline organization**

"Focus on organization of our sales and leads pipeline and spend more time getting back to them." — deals go cold silently without a tracking system.
- 3 Meeting notes and follow-through**

You asked about "tools for meeting recording and note translation" — post-meeting documentation is taking manual effort that could be automated.

**Key finding:** Microsoft Copilot — included in Microsoft 365 Business plans — can generate a complete PowerPoint presentation from a text prompt. If you're not using it, you're spending hours on a task your existing subscription handles in minutes.

## What to Do Monday Morning

Each step takes under an hour. Full recommendation details are on the following pages.

### DAY 1 — MONDAY

~20 minutes

#### Microsoft Copilot — Generate Your First AI Presentation

Open Microsoft 365 and access Copilot in PowerPoint. Type a prompt describing your next presentation — topic, audience, key points. Copilot generates a complete deck. Your job becomes editing, not building from scratch.

→ [microsoft365.com](https://microsoft365.com) → PowerPoint → Copilot icon (top ribbon)

✓ **Done when: You've generated a first-draft presentation from a text prompt and compared the time vs. building manually.**

### DAY 2 — TUESDAY

~15 minutes

#### Fathom — Automatic Meeting Notes (Free)

Install Fathom and connect to your calendar. It joins every scheduled meeting automatically, records, transcribes, and sends a summary with action items within minutes of the call ending. No manual note-taking.

→ [fathom.video](https://fathom.video) → Sign up → Connect Google or Outlook calendar

✓ **Done when: Your next meeting is captured and you receive a summary with action items within 5 minutes of the call ending.**

## DAY 3 — WEDNESDAY

~45 minutes

**HubSpot CRM — Organize Your Sales Pipeline (Free)**

Set up HubSpot's free CRM and add your current pursuits as deals. Each deal has a stage and follow-up date. HubSpot reminds you when a deal goes cold. Your pipeline becomes a dashboard, not a mental list.

→ [hubspot.com/crm](https://hubspot.com/crm) → [Free forever plan](#) → [Add your deals](#)

✓ **Done when: All active pursuits entered as deals with stage and next follow-up date assigned to each.**

## DAY 4 — THURSDAY

~20 minutes

**Copilot in Outlook — Email Drafting at Scale**

Use Copilot directly inside Outlook. It drafts responses, summarizes long threads, and suggests follow-ups without leaving your inbox. Consolidates your ChatGPT/Copilot/Gemini juggling into one tool.

→ [Outlook](#) → [Copilot icon in compose window](#)

✓ **Done when: You've drafted and sent at least 3 emails using Copilot in Outlook.**

# 1 Microsoft Copilot for PowerPoint — Already in Your Subscription

START MONDAY

**WHAT'S COSTING YOU TIME**

You're building presentations from scratch for each pursuit. Each deck takes 2–4 hours — structure, slide design, content, formatting. Multiply by your pursuit volume and it's your largest single time drain.

**WHAT FIXES IT**

Microsoft Copilot in PowerPoint generates a complete presentation from a text description. Your time shifts from building to refining. Available in Microsoft 365 Business Standard and above.

<b>3–4 hrs</b> SAVED PER WEEK ~1 deck/wk × 3-4 hrs saved	<b>\$0</b> ADDITIONAL COST Included in M365 Business	<b>\$600–\$800</b> MONTHLY VALUE 3.5 hrs/wk × \$50/hr × 4 wks
--	--	---

- 1 Open PowerPoint in Microsoft 365. Click the Copilot icon in the top ribbon (requires M365 Business Standard).
- 2 Type a prompt: 'Create a 10-slide presentation for [client type] covering [topic]. Key points: [your messages].'
- 3 Review the generated deck, replace placeholder content, apply your branding. Total time: 30–45 minutes instead of 3–4 hours.

# 2 Fathom — Automatic Meeting Notes and Action Items

START TUESDAY

**WHAT'S COSTING YOU TIME**

Post-meeting documentation is a real pain point. Manual note-taking and writing summaries takes 20–40 minutes per meeting.

**WHAT FIXES IT**

Fathom joins every scheduled Zoom or Google Meet automatically, records, transcribes, and delivers a summary with action items to your inbox within minutes. Free.

<b>1–2 hrs</b> SAVED PER WEEK 30 min × 3-4 meetings/wk	<b>\$0</b> TOOL COST Free individual plan	<b>\$200–\$400</b> MONTHLY VALUE 1.5 hrs/wk × \$50/hr × 4 wks
--	---	---

- 1 Sign up at fathom.video (free). Connect your Google or Outlook calendar.
- 2 Fathom automatically joins your next scheduled Zoom or Google Meet. No action needed per call — it's always on.
- 3 Within 5 minutes of the call ending, receive a summary with key points, decisions, and action items.

**3** **HubSpot CRM** — Get Your Sales Pipeline Out of Your Head

THIS WEEK

**WHAT'S COSTING YOU TIME**  
 Without a system, follow-up timing depends on memory — and deals go cold silently.

**WHAT FIXES IT**  
 HubSpot's free CRM gives every pursuit a stage, follow-up date, and interaction history. See at a glance what's hot and what needs a touch today. Free for up to 5 users.

<p><b>1-2 hrs</b>                  SAVED PER WEEK                  Mental overhead + missed follow-ups</p>	<p><b>\$0</b>                  TOOL COST                  Free tier, up to 5 users</p>	<p><b>\$200-\$400+</b>                  MONTHLY VALUE                  Time + deal recovery value</p>
--	--	---

- 1 Sign up at [hubspot.com/crm](https://hubspot.com/crm) (free). Create a pipeline with stages matching your sales process.
- 2 Add each active pursuit as a deal — company, contact, value, stage.
- 3 Set a follow-up date on each deal. Check the pipeline dashboard each Monday.

**4** **Copilot in Outlook** — Consolidate Your Email AI Workflow

THIS WEEK

**WHAT'S COSTING YOU TIME**  
 You're switching between ChatGPT, Copilot, and Gemini. Context-switching adds friction and inconsistency.

**WHAT FIXES IT**  
 Copilot in Outlook drafts responses, summarizes threads, and suggests follow-ups. One consistent interface that already knows your email history.

<p><b>1 hr</b>                  SAVED PER WEEK                  Tool-switching reduction</p>	<p><b>\$0</b>                  ADDITIONAL COST                  Included in M365</p>	<p><b>\$200</b>                  MONTHLY VALUE                  1 hr/wk × \$50/hr × 4 wks</p>
--	--	---

- 1 Open Outlook. In compose, click the Copilot icon. Select 'Draft with Copilot'.
- 2 For long threads: open the thread, click 'Summarize' for a 3-sentence summary.

**5** **Gamma.app** — Client-Ready Presentations in Minutes

QUICK WIN

**WHAT'S COSTING YOU TIME**  
 For polished external client presentations, PowerPoint can still feel time-consuming to design.

**WHAT FIXES IT**  
 Gamma generates professionally designed presentations from a text prompt. Design handled automatically. Exports to PDF or PowerPoint. Free tier available.

<p><b>1-2 hrs</b>                  SAVED PER DECK                  Design time eliminated</p>	<p><b>\$0-\$10</b>                  TOOL COST                  Free tier covers most use cases</p>	<p><b>Variable</b>                  MONTHLY VALUE                  Based on presentation volume</p>
---	--	---

- 1 Go to gamma.app (free). Click 'New' → 'Generate with AI.' Type your presentation description.
- 2 Gamma builds a complete designed deck. Export to PowerPoint or share as a link.

## What This Is Worth to Your Business

The table below shows estimated monthly value at a conservative \$50/hour labor rate. Tool costs reflect actual April 2026 pricing.

RECOMMENDATION	HRS/WK	HOW WE CALCULATED IT	MONTHLY VALUE	TOOL COST
Copilot for PowerPoint	3–4 hrs	3.5 hrs/wk × \$50/hr × 4 wks	\$600–\$800	\$0
Fathom Meeting Notes	1–2 hrs	1.5 hrs/wk × \$50/hr × 4 wks	\$200–\$400	\$0
HubSpot CRM	1–2 hrs	1.5 hrs/wk × \$50/hr × 4 wks	\$200–\$400+	\$0
Copilot in Outlook	1 hr	1 hr/wk × \$50/hr × 4 wks	\$200	\$0
Gamma.app	1–2 hrs/deck	Variable	\$200–\$400	\$0–\$10
<b>Total</b>	<b>6–9+ hrs/wk</b>		<b>\$1,400–\$2,200/mo</b>	<b>\$0–\$10/mo</b>

\* Labor rate estimated at \$50/hr. Deal recovery value from HubSpot not included but may be the highest actual return.

**Net monthly gain: \$1,400–\$2,200 at essentially zero added tool cost. The top 4 recommendations are either free or already in your Microsoft 365 subscription.**

**Questions? Want Help Getting These Set Up?**

Reply directly to this email with any questions — happy to walk through any step in more detail.

We offer done-for-you implementation. Reply for a quote based on your specific setup.

**[info@getaiaudit.ai](mailto:info@getaiaudit.ai) · [getaiaudit.ai](https://getaiaudit.ai)**