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AI Readiness Audit & Implementation Roadmap

A custom analysis of your business workflows, identifying high-leverage AI opportunities with specific tool recommendations and a prioritized implementation plan.

Mitchell Marketing Group

Marketing Agency · 8 Employees · Scottsdale, AZ

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AI Readiness Audit

getaiaudit.ai

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OVERVIEW

Six Opportunities. 9–13 Hours Recovered Per Week.

Based on your intake responses, Mitchell Marketing Group is operating with significant manual overhead concentrated in four areas: client reporting, meeting documentation, content production, and new business development. None of these require human labor at current volumes. Each has a documented AI solution that has been widely deployed in agencies of comparable size.

The recommendations in this report are prioritized by impact relative to implementation effort. The top three opportunities alone account for 8–11 hours of recoverable time per week at a combined cost of \$138/month — a return of approximately \$2,600–\$4,100/month at conservative billing rates.

6

OPPORTUNITIES IDENTIFIED

9–13

HOURS RECOVERED/WEEK

\$67

EST. TOOL COST/MONTH

17x

ROI ON THIS AUDIT

KEY FINDING

The Reporting Problem Is The Priority

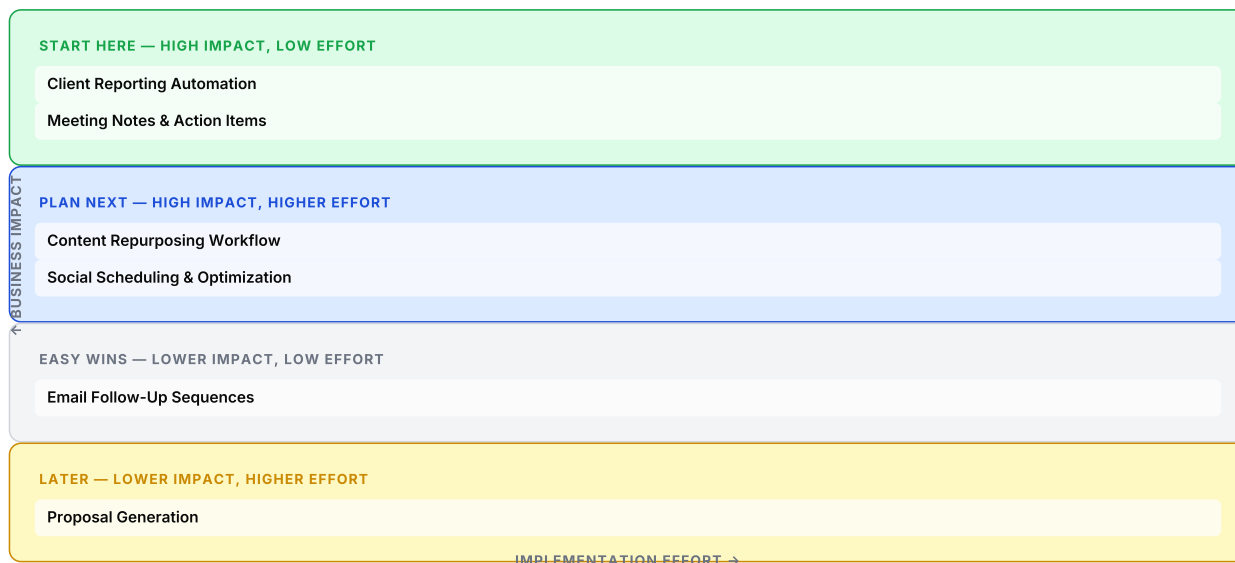
Mitchell Marketing Group is spending an estimated 4–5 hours per week manually pulling performance data from Meta, Google Ads, and LinkedIn to build client reports in Google Slides. With 14 active clients, this is the single largest addressable time drain in the operation and has a direct solution: automated reporting software that connects to all ad platforms and generates branded reports on a defined schedule.

Bottom line: Full implementation of all six recommendations is estimated to take 4–6 business days of setup time. The time recovered in the first month alone returns 36–52 hours — the equivalent of adding a part-time employee without the overhead.

PRIORITIZATION FRAMEWORK

Where to Start — Impact vs. Implementation Effort

Recommendations are plotted by estimated business impact (hours recovered + revenue potential) against implementation effort (time to configure, complexity, cost). The upper-left quadrant represents your highest-leverage starting point.



RECOMMENDATION SUMMARY

OPPORTUNITY	TOOL	COST/MO	HRS SAVED/WK
1. Client Reporting Automation	AgencyAnalytics	\$79	4–5 hrs
2. Meeting Notes & Action Items	Fathom	Free	2–3 hrs
3. Content Repurposing	Castmagic + Claude	\$59	2–3 hrs
4. Proposal Generation	Pandadoc	\$35	1.5–2 hrs
5. Social Scheduling	Buffer	\$18	1–2 hrs
6. Email Follow-Up	Instantly.ai	\$37	0.5–1 hr
Total		~\$228	11–16 hrs/wk

1 Client Reporting Automation

START HERE

THE PROBLEM

4–5 hours per week pulling data from Meta, Google Ads, and LinkedIn manually into client Slides decks across 14 accounts.

THE SOLUTION

AgencyAnalytics connects all ad platforms and auto-generates branded reports on a defined schedule. Zero manual data entry.

4–5 hrs

SAVED PER WEEK

\$79/mo

TOOL COST

~\$1,500

MONTHLY VALUE RECOVERED

19x

MONTHLY ROI

- 1 Sign up at agencyanalytics.com. Connect your highest-maintenance client's Meta + Google accounts first.
- 2 Build one report template using your brand colors and logo. This template applies to all future clients.
- 3 Set automated delivery schedule (weekly or monthly) per client. Reports send automatically — no action required.

2 Meeting Notes & Action Items

START HERE

THE PROBLEM

Manual note-taking in every client call plus 20–30 minutes of post-call writeup per meeting for summaries and action items.

THE SOLUTION

Fathom joins every scheduled call, records, transcribes, and delivers a summary with action items within minutes of the call ending.

2–3 hrs

SAVED PER WEEK

Free

TOOL COST

~\$750

MONTHLY VALUE RECOVERED

∞

ROI (ZERO COST)

- 1 Install Fathom at fathom.video. Connect your Google or Outlook calendar. Takes 5 minutes.
- 2 Fathom automatically joins every scheduled Zoom or Google Meet. No action required per call.
- 3 Post-call summary and action items land in your inbox within minutes of the call ending.

FINANCIAL IMPACT

The Business Case

The following projections are based on your intake responses and conservative estimates of your hourly billing rate (\$75/hr). Actual recovery will vary based on implementation speed and team adoption.

OPPORTUNITY	HRS/WK RECOVERED	MONTHLY VALUE	TOOL COST/MO
Client Reporting Automation	4–5 hrs	\$1,200–\$1,500	\$79
Meeting Notes & Action Items	2–3 hrs	\$600–\$900	\$0
Content Repurposing	2–3 hrs	\$600–\$900	\$59
Proposal Generation	1.5–2 hrs	\$450–\$600	\$35
Social Scheduling	1–2 hrs	\$300–\$600	\$18
Email Follow-Up	0.5–1 hr	\$150–\$300	\$37
Total	11–16 hrs/wk	\$3,300–\$4,800/mo	\$228/mo

Net monthly gain after tool costs: \$3,072–\$4,572. Payback period on this audit: less than 48 hours of recovered time.

4-DAY IMPLEMENTATION ROADMAP

From Zero to Running in One Week

DAY 1

Fathom

Install and connect calendar. Your next call is automatically captured. 5-minute setup.

DAY 2

AgencyAnalytics

Connect highest-maintenance client. Build report template. First automated report sent.

DAY 3

Castmagic

Upload a client video or podcast. Review output. This becomes your content repurposing baseline.

DAY 4

Pandadoc

Build one proposal template. Use it on next prospect. Measure time vs. current process.

NEED HELP IMPLEMENTING?

We offer done-for-you implementation — we configure the tools, build the templates, connect the integrations, and train your team.

Reply to your audit delivery email to request a quote.