

# FIELD SERVICES AI WORKFLOW AUDIT

Founder-friendly audit sample (Fictional)

Client: Summit Field Services

Date: Feb 9, 2026

## What this audit delivers for a founder

- Clear view of where revenue is leaking in the journey
- Exact steps to fix bottlenecks without hiring more staff
- ROI-backed plan you can execute or delegate
- A 30-90 day roadmap with measurable outcomes



Outcomes delivered: faster response, higher quote acceptance, fewer no-shows.

# FOUNDER SUMMARY (PLAIN ENGLISH)

This audit shows exactly where revenue leaks and what to fix first.

Response time

**4.5 hrs**

Target: 15 mins (-94%)

Quote acceptance

**42%**

Target: 56% (+14 pts)

No-show rate

**12%**

Target: 8% (-4 pts)

## What improves for the owner

- Faster response wins more jobs without extra ad spend.
- Cleaner quoting reduces rework and protects margin.
- Automated follow-ups stop leads from going cold.
- Scheduling automation reduces no-shows and saves admin hours.

## Estimated value unlocked (90 days)

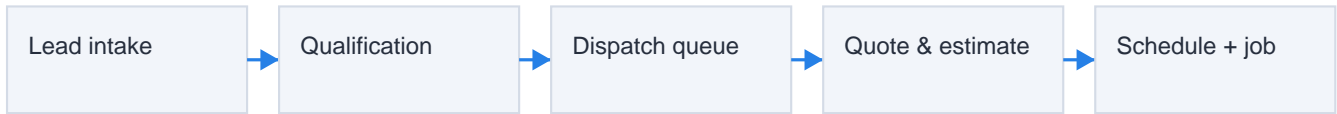
Revenue at risk: GBP 48k / month

Projected uplift: GBP 62k / month

Payback: 3.2x within 90 days (illustrative)

# WORKFLOW DIAGNOSIS

Systems observed: HubSpot, Jobber, Google Workspace, Aircall, Stripe.



## Friction points

- Lead routing depends on manual tag + email forwarding.
- Dispatch waits for quote details (avg 6.5 hrs).
- No-show follow-up is inconsistent across regions.
- Field notes are stored in different tools, so context is lost.

## Data quality snapshot

- 18% of leads missing service type
- 22% missing preferred time window
- 31% missing photo/video attachments

# BOTTLENECKS & EVIDENCE

Lead response delay

**2-4 hrs**

Primary cause: manual inbox triage

Quote rework

**28%**

Missing job fields at first pass

## Evidence highlights (last 30 days)

- Dispatch queues show 4+ hour gaps between intake and assignment.
- 1 in 5 quotes require manual rework before sending.
- Follow-ups drop after 2nd touch; SMS not automated.
- Missed appointments spike on Mon/Tue afternoons.

# AUTOMATION PLAN (SPRINT)

Focused on immediate response + quote conversion uplift.

## Automation 1: Unified intake + SLA routing

Auto-capture job type, enrich lead, route to dispatch in < 2 minutes.

Owner impact: fewer missed leads and faster job booking.

## Automation 2: Quote builder + follow-up

Required fields + dynamic pricing rules + 3-touch follow-up sequence.

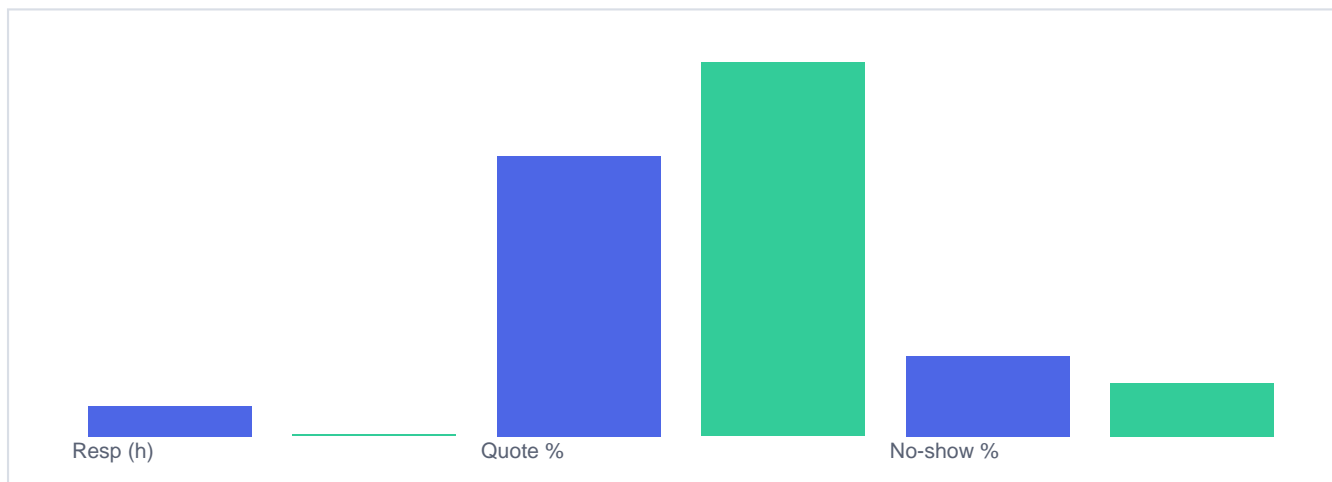
Owner impact: higher quote acceptance and less rework.

## Automation 3: Schedule + no-show rescue

Calendar sync, SMS reminders, reschedule flow for missed visits.

Owner impact: more completed jobs per week.

# KPI TARGETS & ROI



Baseline (blue) vs target (green).

## Uplift summary (90 days)

Response time: 4.5h -> 0.25h (4.25h faster, -94%)

Quote acceptance: 42% -> 56% (+14 pts, +33%)

No-show rate: 12% -> 8% (-4 pts, -33%)

## ROI model (illustrative)

Revenue at risk: GBP 48k / month

Projected uplift: GBP 62k / month

Payback: 3.2x within 90 days (illustrative)

# IMPLEMENTATION TIMELINE

Week 1-2: Audit + KPI baseline

Week 3-4: Build + integrations

Week 5-6: QA + launch

Week 7+: Optimization + expansion

## WHAT WE NEED FROM YOU

- 60-90 minute discovery call
- Access to CRM + scheduling tools
- Sample of recent leads + quotes

## NEXT STEPS

1. Confirm stakeholders + audit kickoff
2. Provide system access + lead export
3. Approve sprint scope + start date

This is a fictional example to illustrate deliverable depth.