

Business Automation Audit Report

Where Northfield Heating & Air is losing revenue today, what it is costing, and the fastest path to recover it.

"If I'm under a unit, I'm not picking up. That's just how it is."

OWNER, NORTHFIELD HEATING & AIR

SAMPLE REPORT. ILLUSTRATIVE DATA.

PREPARED FOR

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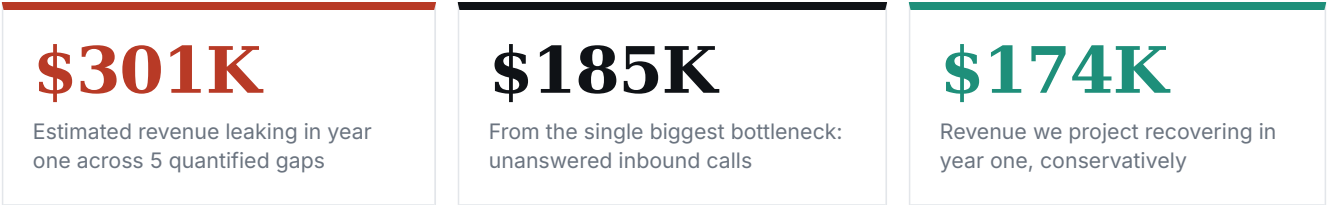
DATE

October 2026

EXECUTIVE SUMMARY

Northfield Heating & Air is leaving about \$301K on the table in the first year.

Roughly 1 in 4 inbound calls goes to voicemail because the owner and the only office person are on a job or on another line. Those callers do not leave messages. They call the next name on Google.



What is happening

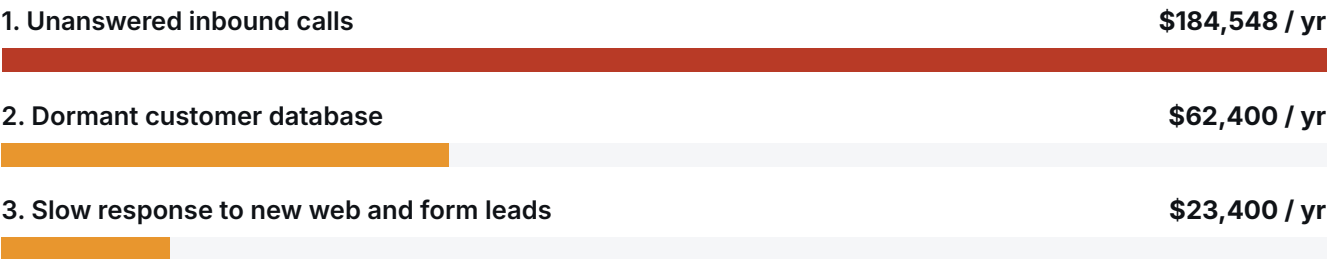
Northfield Heating & Air is a good business with a leaky front end. Work that has already been earned (a ringing phone, a lead that filled out a form, a quote someone asked for, a customer who already trusted you once) is slipping away because nobody has the time to catch it.

PRIMARY BOTTLENECK

Missed calls while techs are on jobs

Calls roll to voicemail during jobs, lunch and after 5 PM. Voicemails are returned the next morning, often after the caller has booked someone else.

Where the money is



What we recommend

Fix in this order: stop the missed-call leak first, then recover quotes and leads already in the pipeline, then wake up the customer list. The full plan is on the pages that follow. Total year-one investment is \$19,406 against \$174,129 in projected recovered revenue.

DISCOVERY FINDINGS

What we heard on the audit call

Everything in this report traces back to what was said on the call. The numbers below are the inputs to every calculation that follows.

Inbound calls per week	~60
Calls that go unanswered	~28%
Average ticket (repair + install blend)	\$650
Quotes sent per month	~30
Quotes with no follow-up	~60%
Past customers in the system	~2,400
Current follow-up process	Manual, when time allows
Tools in use	ServiceTitan-lite, Google Business Profile, Gmail

In your words

“If I’m under a unit, I’m not picking up. That’s just how it is.”

OWNER, NORTHFIELD HEATING & AIR

“I send the estimate and then honestly I forget until they call me back.”

OWNER, NORTHFIELD HEATING & AIR

“We’ve got a couple thousand people in the system that I haven’t talked to in years.”

OWNER, NORTHFIELD HEATING & AIR

PRIMARY BOTTLENECK

Unanswered inbound calls

Calls roll to voicemail during jobs, lunch and after 5 PM. Voicemails are returned the next morning, often after the caller has booked someone else.

What it costs, step by step

Every figure uses numbers you gave us. Nothing is rounded in our favor.

Inbound calls per year	60 per week x 52 = 3,120
Unanswered	3,120 x 28% = 874 calls
Genuine new-business callers	874 x 65% = 568
Jobs lost at your close rate	568 x 50% = 284 jobs
Revenue lost per year	284 x \$650 = \$184,548

WHY THIS ONE COMES FIRST

A missed call is the most expensive leak because the customer was ready to buy and had a problem right now. A customer who calls with a dead furnace does not leave a voicemail and wait. This is also the fastest gap to close: it can be live in about 2 weeks.

Every gap we found, ranked by dollars

Unanswered inbound calls	\$184,548
Dormant customer database	\$62,400
Slow response to new web and form leads	\$23,400
Sent quotes are never followed up	\$21,060
Estimate-to-invoice handoff is manual	\$9,360

GAP	SEVERITY	WHAT WE FOUND	ANNUAL IMPACT
Unanswered inbound calls Call handling	CRITICAL	Calls roll to voicemail during jobs, lunch and after 5 PM. Voicemails are returned the next morning, often after the caller has booked someone else.	\$184,548
Dormant customer database Repeat revenue	HIGH	About 2,400 past customers, including systems that are now 8 to 15 years old. No one has contacted them since the original job.	\$62,400
Slow response to new web and form leads Lead follow-up	HIGH	Leads from the website and Google Local Services sit until the owner checks his phone at night. Half wait more than an hour for a first response.	\$23,400
Sent quotes are never followed up Quote follow-up	HIGH	Estimates go out by email and then nothing happens unless the customer replies. There is no reminder, no second touch and no deadline.	\$21,060
Estimate-to-invoice handoff is manual Operations	MEDIUM	The office re-types every approved estimate into the invoicing tool, about 10 hours a week.	\$9,360
No system for asking for reviews Reputation	MEDIUM	Reviews arrive only when a happy customer volunteers one. The Google profile has far fewer reviews than the two nearest competitors.	n/a Compounds F1 and F2. Not quantified.
Recurring leak (repeats every year)			\$238,368
One-time opportunity (customer list, counted once)			\$62,400
Total quantified, year one (revenue)			\$300,768
Same total as gross profit at 45% margin			\$135,346

THE COST OF WAITING

Doing nothing is not free

At the current run rate, Northfield Heating & Air loses about **\$19,864 every month**. That is revenue from customers who already wanted to buy.

IF NOTHING CHANGES	CUMULATIVE REVENUE LOST
12 months	\$300,768
24 months	\$539,136
36 months	\$777,504

Recurring leaks repeat every year. The one-time customer-list opportunity (\$62,400) is counted once, not multiplied.

THE OUTCOME

What the business looks like after

Every call answered in under 3 seconds, every lead texted back within a minute, and every past customer hearing from you twice a year, without adding headcount or answering the phone after hours.

Today

- Calls go to voicemail during jobs and after hours
- New leads wait hours for a reply
- Quotes are sent and forgotten
- Past customers never hear from you
- You are the bottleneck

After

- Every call answered in seconds, 24/7
- Every lead texted back in under a minute
- Every quote followed up until won or closed
- Past customers reactivated twice a year
- The business runs while you are on the job

RECOMMENDED SOLUTIONS

How we close each gap

Each solution is matched to a specific finding, so you only pay for what fixes a leak.

AI Voice Receptionist	CORE SOLUTION
Answers every call, 24/7, and books the job.	
Picks up in seconds, qualifies the issue, checks your calendar, books the appointment or flags the emergency to your phone, and texts the customer a confirmation.	
Fixes: Unanswered inbound calls	
Live in: about 2 weeks Projected year-one recovery: \$113,036	
AI SMS Outreach	CORE SOLUTION
Texts every new lead in under 60 seconds and keeps chasing open quotes.	
Instant text-back on new leads and missed calls, then a timed follow-up sequence on every unsigned quote until it is won, lost or expired.	
Fixes: Slow response to new web and form leads; Sent quotes are never followed up	
Live in: about 2 weeks Projected year-one recovery: \$23,342	
AI Database Reactivation	CORE SOLUTION
Turns the customer list you already own into booked jobs.	
Segments past customers by system age and last service, then runs a text-first campaign that offers a tune-up or replacement evaluation and books replies automatically.	
Fixes: Dormant customer database	
Live in: about 3 weeks Projected year-one recovery: \$31,200	

Email Campaign

CORE SOLUTION

Seasonal touches and automatic review requests after every job.

A review request goes out after each completed job. Quarterly seasonal emails keep Northfield top of mind before the first hot or cold week.

Fixes: No system for asking for reviews

Live in: about 2 weeks | **Projected year-one recovery:** not counted (compounds other gains)

Custom Build: Estimate-to-Invoice Automation

CUSTOM BUILD

Approved estimate becomes an invoice with zero re-typing.

A lightweight integration pushes approved estimate data into the invoicing tool and flags exceptions for a human to review.

Fixes: Estimate-to-invoice handoff is manual

Live in: about 3 weeks | **Projected year-one recovery:** \$6,552

PRIORITIES

What to do first

Each gap is placed by how much money it costs (impact) and how fast we can fix it (effort). Start in the top-left.

LOW EFFORT (LIVE IN 2 WEEKS OR LESS)

Quick wins: do first
High impact, low effort
Unanswered inbound calls (\$185K)
Slow response to new web and form leads (\$23K)
Sent quotes are never followed up (\$21K)

Fill-ins: when time permits
Lower impact, low effort
No system for asking for reviews

HIGHER EFFORT (3+ WEEKS)

Major projects: plan carefully
High impact, higher effort
Dormant customer database (\$62K)

Lowest priority
Lower impact, higher effort
Estimate-to-invoice handoff is manual (\$9K)

Your first week

Four days from yes to live. The “You” rows are the only things we need from you.

DAY	WHO	TASK	TIME	WHAT IT UNLOCKS
Day 1	YOU	Export your customer list from the invoicing tool: name, mobile number, email, last job date, equipment age if you have it.	45 minutes	The reactivation list is unblocked and we know how many customers have a mobile number.
Day 1	WE DO	Confirm your phone carrier, call forwarding options and calendar access. Pull one week of call logs to verify the missed-call rate.	1 hour	The 28% missed-call figure is confirmed or corrected with real data.
Day 2	WE DO	Write the receptionist script from your top 10 call types, pricing rules and emergency rules. You approve it.	20 minutes of your time	An approved script that sounds like Northfield, not a robot.
Day 3	WE DO	Build and test with 20 simulated calls: emergency, booking, pricing, wrong number, angry caller.	Half a day	Every edge case handled before a real customer hears it.
Day 4	WE DO	Go live after hours and on overflow first, with instant text-back on every missed call.	1 hour	Calls that used to become voicemails become booked appointments, starting tonight.

ROADMAP

What to do first, and what can wait

Sequenced by dollars recovered per week of effort. The first 30 days stop the bleeding.

DAYS 1 TO 30 Stop the bleeding • AI Voice Receptionist live on the main line • AI SMS Outreach: instant text-back on every lead and missed call	DAYS 31 TO 60 Recover what is already in the pipeline • Quote follow-up sequences switched on • AI Database Reactivation: first campaign to the 2,400 past customers	DAYS 61 TO 90 Compound and clean up • Email Campaign: automatic review requests plus seasonal sends • Custom estimate-to-invoice automation
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Investment and return

SOLUTION	ONE-TIME SETUP	MONTHLY	YEAR-ONE COST	PROJECTED RECOVERY
AI Voice Receptionist	\$1,500	\$497	\$7,464	\$113,036
AI SMS Outreach	\$750	\$297	\$4,314	\$23,342
AI Database Reactivation	\$1,200	\$197	\$3,564	\$31,200
Email Campaign	\$500	\$147	\$2,264	not counted
Custom Build: Estimate-to-Invoice Automation	\$1,800	none	\$1,800	\$6,552
Total	\$5,750	\$1,138	\$19,406	\$174,129

\$155K Projected net gain in year one after all costs	9.0x Projected revenue recovered per dollar invested	Month 2 When cumulative recovery first covers setup and fees
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Projected recovery is the share of each gap we expect to close, ramped over the first three months. Revenue figures are not profit. Full run-rate recovery after year one: \$163,348 per year.

How to read these numbers

Every dollar figure is calculated from inputs you gave us on the audit call plus the conservative assumptions below. We would rather under-promise and over-deliver.

What the projections assume

- Weeks per year: 52.
- Share of unanswered calls that are genuine new-business opportunities (not spam or existing customers): 65%.
- Share of slow-responded leads lost purely to the delay: 30%.
- Share of un-followed-up quotes recoverable with a follow-up sequence: 15%.
- Share of dormant customers who book from one reactivation campaign: 4%.
- Recurring recovery ramps after go-live (25% in month 1, 50% in month 2, 75% in month 3, then 100%), so year-one recurring recovery is 87.5% of the full run-rate.
- Database reactivation is treated as a one-time harvest, not recurring revenue, and is never multiplied across years.
- Inputs reported by the client (ticket size, close rate, call volume, quote volume) were taken as stated.
- Figures come from what was shared on the audit call and have not been verified against call logs or the CRM. Verifying them is the first week of any engagement.
- Dollar figures are revenue, not profit.

Deliberately left out of the totals

These are real, but we cannot defend a number for them yet, so they are not in the totals.

Review engine. Real and compounding, but there is no baseline review count to project from and no clean way to attribute it. Counted at \$0 on purpose.

Paid advertising uplift. This projection assumes zero new ad spend. Every dollar comes from calls, leads and customers you already have.

Referral and maintenance-plan revenue. Reactivation will surface these, but one campaign is not a forecast. Size it after the first season of tracking.

Confirm before relying on these numbers

The first week of any engagement answers these with real data, and we update the report if anything changes.

- How many of the ~2,400 past customers have a mobile number on file, and not just a mailing address or landline?
- What do the call logs show for the real missed-call rate across a full week, including after-hours?
- Is the \$650 average ticket the same for past customers as for new callers, or smaller?
- When was the last time anyone contacted the past-customer list, and what was sent?

NEXT STEPS

Getting started

1. Review this report and flag anything that does not match how the business really runs.
2. Approve the 30-day plan and we start the build the same week.
3. Kickoff call to connect your phone line, calendar and customer list.

Questions or ready to move?

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APPENDIX

Calculation detail

The step-by-step math behind each finding, using the numbers from your audit call. The largest finding is worked through on its own page earlier in this report.

Dormant customer database

Past customers not contacted	2,400
Book from one campaign	$2,400 \times 4\% = 96 \text{ jobs}$
Revenue sitting in the list	$96 \times \$650 = \$62,400$

Slow response to new web and form leads

New leads per year	$40 \text{ per month} \times 12 = 480$
Answered slowly (over 1 hour)	$480 \times 50\% = 240$
Lost to the delay alone	$240 \times 30\% = 72$
Jobs lost at your close rate	$72 \times 50\% = 36 \text{ jobs}$
Revenue lost per year	$36 \times \$650 = \$23,400$

Sent quotes are never followed up

Quotes sent per year	$30 \text{ per month} \times 12 = 360$
Never followed up	$360 \times 60\% = 216$
Recoverable with follow-up	$216 \times 15\% = 32.4 \text{ jobs}$
Revenue left on the table	$32.4 \times \$650 = \$21,060$

Estimate-to-invoice handoff is manual

Manual hours per week	10
Loaded hourly cost	\$18
Cost per year	$10 \times \$18 \times 52 = \$9,360$