

FREE FIELD GUIDE · 2026 EDITION

The 7-System AI Audit Checklist.

The exact framework I use to find the highest-ROI places to deploy AI inside a founder-led or small business — before I write a single line of automation code.

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HOW TO USE THIS CHECKLIST

Read it like an operator. Score yourself out of 7.

Every founder-led business runs on the same seven systems — whether they've named them or not. Most have **2–3 running well**, **2–3 running on duct tape**, and **1–2 nobody owns**. That last category is where AI pays off fastest, because you're not replacing a working process — you're *creating* one for the first time.

For each of the seven systems below, do three things:

- Answer the **audit questions** honestly. One sentence each.
- Check for the **red flags**. If you see two or more in any system, that's where you start.
- Note the **AI opportunity** and the **ROI ballpark**. Rank them. Build in order.

Most clients find that **two systems** deserve immediate AI investment, and the rest can wait. Better to ship one working pilot in 30 days than to plan five systems for a year.

YOUR SCORECARD			
System	Owned?	Red flags	Priority
1. Lead capture			
2. Sales follow-up			
3. Cold outbound			
4. Inbound support			
5. Internal ops & admin			
6. Knowledge & SOPs			
7. Reporting & dashboards			

SYSTEM 01 · OF 07

Lead Capture & Qualification

What this is

How a stranger goes from 'never heard of you' to 'qualified prospect with contact info in your CRM.'

Audit questions

- Where does every new lead enter your business — form, call, referral, ad, walk-in?
- Who (or what) decides if a lead is qualified before it reaches a salesperson?
- How long between lead entry and first human response? Be honest.
- What % of inbound leads never get followed up on at all?

Red flags (2+ = priority)

- × Leads sit unread for more than 1 business day.
- × Sales spends time qualifying leads that should have been filtered.
- × You can't tell which channel produced your last 10 customers.
- × Manual data entry copies the same lead into 2+ tools.

AI opportunity

AI form router + qualification agent: every inbound lead is auto-scored against your ideal-customer profile, routed to the right rep or auto-replied to with a calendar link, and pushed to the CRM with enrichment data (company size, stack, role) attached.

ROI ballpark

5–15 hrs/week of sales-rep time recovered + 20–40% lift in qualified-meeting volume. Pays for itself inside the first month for most \$500k+ ARR businesses.

SYSTEM 02 · OF 07

Sales Follow-Up & CRM Hygiene

What this is

Everything between 'lead is qualified' and 'deal is won or dead.' The follow-up cadence, the notes, the CRM stage discipline.

Audit questions

- What's your average follow-up cadence after a first call? Written down or vibes?
- How many touches before a lead is 'cold'?
- When did you last audit your CRM for stale deals stuck in one stage for 30+ days?
- Who writes the call notes — and does anyone read them later?

Red flags (2+ = priority)

- × Reps re-introduce themselves to leads they've already talked to.
- × Pipeline stages are full of deals nobody can give a current status on.
- × Call notes are either non-existent or unreadable.
- × Forecasting is a guess, not a number you trust.

AI opportunity

AI follow-up co-pilot: auto-drafts the next message based on call transcript + deal stage, flags deals that haven't moved in N days, writes the CRM notes for you, and produces an honest weekly pipeline summary instead of vibes.

ROI ballpark

Most reps recover 4–8 hrs/week. Close rates lift 10–25% because no deal goes silent. Easiest ROI in the entire stack.

SYSTEM 03 · OF 07

Cold Outbound (Email + LinkedIn)

What this is

How you generate net-new pipeline that didn't come in through a referral or paid ad.

Audit questions

- Do you have an outbound motion at all? If yes — who runs it?
- How do you build target lists today? Apollo, ZoomInfo, manual scraping, gut feel?
- What's your reply rate on a typical cold sequence? (If you don't know, that's a flag.)
- How personalized is your outreach — really? Read your last 5 cold emails out loud.

Red flags (2+ = priority)

- × You sound exactly like every other vendor in your category.
- × Lists are stale within 2 weeks of being built.
- × You're sending high volume but reply rate is under 2%.
- × Nobody owns outbound — it's 'when we have time.'

AI opportunity

Outbound engine: AI builds lists from your ICP definition (firmographic + technographic filters), researches each prospect, drafts personalized first-touch emails in your voice, and handles reply routing. Human approves and sends.

ROI ballpark

Most SMBs double meeting volume in 60 days. The killer metric isn't reply rate — it's *qualified replies per hour of human time spent*.

SYSTEM 04 · OF 07

Inbound Support & Tier-1 FAQ

What this is

Every question a prospect or customer asks that you've answered before. Pricing, scope, timelines, 'do you do X?'

Audit questions

- What are the 10 most common questions in your inbox right now? Write them down.
- How many of those are answered somewhere in your documentation, FAQ, or website?
- Average response time to a question? Median, not your best day.
- How often does a question route through 2+ people before getting answered?

Red flags (2+ = priority)

- × You're answering the same 5 questions every week.
- × Customers wait 24+ hours for answers you could give in 2 minutes.
- × Internal Slack threads exist to answer questions that are already documented.
- × Founders are doing Tier-1 support past month 12.

AI opportunity

Tier-1 support agent trained on your FAQ, pricing, scope, and historical replies. Answers ~70% of inbound directly, drafts a reply for human approval on the rest, and routes anything sensitive (refunds, churn risk) straight to a person.

ROI ballpark

Median founder reclaims 6–12 hrs/week. Customer NPS lifts because answers come back in minutes, not days.

SYSTEM 05 · OF 07

Internal Ops & Admin

What this is

Invoicing, scheduling, document drafting, contracts, expense reports — the quiet drag on every business.

Audit questions

- How long does it take you to send a new client their kickoff docs (contract, invoice, onboarding)?
- Who reconciles your numbers each month? How long does it take?
- What's your slowest admin task — the one you procrastinate on?
- Do you have a written SOP for it, or does it live in someone's head?

Red flags (2+ = priority)

- × Invoices go out late or get forgotten.
- × Contracts are copy-paste from a Google Doc with manual find-and-replace.
- × Scheduling takes 4+ emails to land a time.
- × Bookkeeping is a once-a-quarter panic.

AI opportunity

Document generator + reconciliation agent: contracts, invoices, scopes, and follow-up letters drafted from a single intake form. Recurring admin (categorizing transactions, drafting status updates) handled by an agent that asks for human approval before sending.

ROI ballpark

5–10 hrs/week of low-leverage time eliminated. Usually the system founders say they want last but feel the most relief from once it ships.

SYSTEM 06 · OF 07

Knowledge & SOPs

What this is

The internal brain of the company. The answers to 'how do we do X here?' that aren't documented but should be.

Audit questions

- If your top performer left tomorrow, what % of their knowledge would walk out the door?
- Where do new hires actually go to learn how things work — docs, Slack search, asking around?
- When you discover a better way to do something, where does it get recorded?
- How often do you re-explain the same internal process to a different person?

Red flags (2+ = priority)

- × Onboarding new hires takes weeks because nothing's written down.
- × Same questions get asked in Slack every month.
- × Two people on the team do the same task two different ways.
- × Process improvements live in someone's head and die with their attention.

AI opportunity

Internal Q&A; bot indexed on your docs, past Slack messages, Notion/Confluence, and SOPs. Anyone on the team can ask 'how do we do X?' and get a sourced answer. Surfaces gaps where no documentation exists so you can fill them.

ROI ballpark

New-hire ramp time cuts in half. The compounding ROI is harder to measure but bigger than any other system — it's how a 5-person team starts operating like a 15-person team.

SYSTEM 07 · OF 07

Reporting & Dashboards

What this is

How you actually know what's working. Numbers a human looks at to make decisions — not vanity metrics in 12 tools.

Audit questions

- What are the 3–5 numbers you'd want to see every Monday morning?
- Can you currently get them in under 5 minutes, without pulling reports manually?
- Who builds your reports today? How long does it take?
- When was the last time a dashboard changed a decision you made?

Red flags (2+ = priority)

- × Numbers live in 4+ tools that don't talk to each other.
- × Weekly review is 'whoever shouts loudest about their priority wins.'
- × Reports get built once and never updated.
- × You measure activity (emails sent, calls made) instead of outcomes (revenue, retention).

AI opportunity

Unified reporting agent: pulls from your CRM, billing, analytics, and ad platforms; writes a plain-English weekly summary of what moved and what didn't; surfaces anomalies before you have to ask.

ROI ballpark

The hidden ROI here is *decision quality*, not time saved. Most teams add 10–15% to revenue inside 6 months once they're actually measuring the right things.

WHAT'S NEXT

You've done the audit. Now what?

If you went through all seven systems honestly, you probably have **1–2 obvious candidates for an AI build** and **2–3 that need cleanup before AI would even help**. That's the right place to land. The mistake is trying to fix all seven at once.

If you want a second set of eyes on it — applied to your actual business, with the workflow review, ROI estimates, and a working pilot deployed in 7 days — that's exactly what the **\$999 AI Audit + Pilot Build** is.

\$999 · AI Audit + 7-Day Pilot Build

Full workflow review · top 3–5 AI opportunities · written roadmap · working pilot deployed by day 7 · 60-min delivery call. Audit fee credited if you upgrade in 30 days.

Start the audit: cartersimmons.org/#packages

Questions first: carter@cartersimmons.org

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