aiPartners

AI READINESS ASSESSMENT

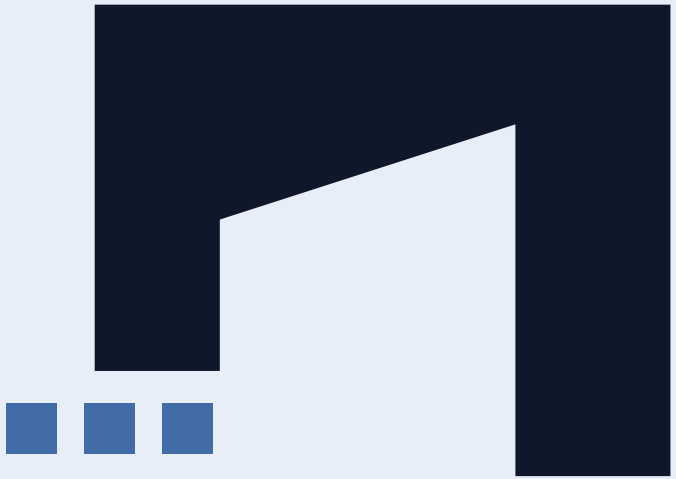
Consulting operations

Prepared for

[redacted]

Assessment date

[redacted]



Executive Summary

One person uses AI well — that's you. The team their workflows aren't connected yet, and the processes are held together by personal attention. We identified **20- 24 hours/month** of founder time trapped in manual work that the right tools(some of which you already pay for) should eliminate this week.

OUTCOME

With five targeted tools and four days of setup, you can reclaim 5-6+ hours per week, automate payment chasing, see what your team is doing without needing to ask or feeling pushy, and run 200-400 targeted LinkedIn touchpoints per month on autopilot.

CRITICAL PAIN POINTS

- No **consistent** baseline revenue **outside** [redacted]
- Poor timeline management with clients
- Weak credit control **(late payments are a recurring issue**)
- Admin is neglected — invoicing, expenses, HR all ad hoc
- Information lives **in** [redacted]**'s head rather than systems**
- **No centralized tracking** of what's working vs. not across the team

5-6

HOURS / WEEK RECLAIMED

PRIMARY FOCUS

(Efficiency)

Impact-Effort Matrix

QUICK WINS

Zoho Books — Recurring Invoices
Float — Cash Flow Forecasting
Fathom AI — Meeting Intelligence
Expandi — Automated Network Growth
Bitrix24 — Weekly Team Digest

MAJOR PROJECTS

Automated Credit Control System
ChatGPT Team Workspace
[redacted] + AI Integration Design

← HIGH IMPACT

← LOW EFFORT

HIGH EFFORT →

IGNORE

Platform switching (no near-term gains)
Exploring new CRM tools

FILL LATER

Zoho People — HR Management
Team AI Onboarding
Deel / Cross-border Payroll

← LOW IMPACT

Recommended Solutions

01 Manual Invoicing & Late Payments

Tool: Zoho Books + Payment Reminders

You draft invoices in Word and chase payments personally. Zoho Books automates recurring invoices and sends a 4-step payment reminder sequence (7 days before → due date → 1 day overdue → 3 days overdue) from a neutral address — without you being involved.

Complexity: Easy · Cost: £0 (owned) · Setup: 1-2 hrs · Saves: ~1 hr/wk

02 Cash Flow Blindspot

Tool: **Float**

Revenue is "bouncy".. [redacted]. Float connects to QuickBooks and provides rolling 30–90 day cash flow forecasts with scenario modelling ("**What if** [redacted] **pays 30 days late**?").
The value isn't only hours saved but it's decisions **you don't have to mak**e under pressure.

Complexity: Easy · Cost: from ~$53/mo · Setup: 2-3 hrs · Saves: ~1 hr/wk

03 Meeting Intelligence Gap

Tool: **Fathom AI**

You keep raw meeting files and query them in ChatGPT when needed. Fathom auto-joins video calls, transcribes, and produces AI summaries with action items immediately. Free for unlimited own-calls with a searchable archive.
You're currently using Zoho's integrated tool — Fathom is a significant **FREE** upgrade.

Complexity: Easy · Cost: $0 (free tier) · Setup: 15 min · Saves: ~0.5-1 hr/wk

04 Networking Isn't Automated

Tool: **Expandi**

You do targeted LinkedIn outreach manually. [redacted] handles outreach in [redacted]. [redacted] works [redacted] LinkedIn. There's no coordination, no tracking, no consistency.
Expandi automates connection requests, DM sequences, follow-ups, and profile views on autopilot with human-like behaviour. It works alongside Folk CRM.

Complexity: Easy · Cost: $99/mo ($79 annual) · Setup: 2 hrs · Saves: ~2-3 hrs/wk

Quick Wins Plan — Day 1 to Day 4

Day 1

Configure Zoho Books for [redacted] (or other clients). Set up the [redacted] recurring invoice and the 4-step payment reminder sequence.

(7 days before → due date → 1 day overdue → 3 days overdue).

This one task removes the most anxiety-inducing manual step.

Two hours of setup means invoices go out automatically.

Zoho Books

Day 2

Connect Float to QuickBooks.

Configure scenario modelling and set up the 90-day rolling forecast. This is the biggest single-impact tool because it eliminates the "will I make payroll?" anxiety.

Float's value shows up in the decisions you **don't have to make** under pressure.

Float

Day 3

Sign up for Fathom AI (free tier).

Connect your Google or Zoho calendar. The **plug and play** notetaker bot auto-joins calls, records, transcribes, and produces AI summaries with action items.

Free for unlimited own-calls

Fathom AI

Also configure the Bitrix24 weekly team digest, set up your automated Monday email with deal movements, call logs, and or task completions

Bitrix24 Digest

Day 4

Set up Expandi for automated LinkedIn outreach.

Configure target audience and sequences, DM campaigns, and follow-ups for [redacted]'s deal sourcing and/ or [redacted]'s network growth. Dedicated IP + auto warm-up keeps accounts safe.

Expandi

Also start building [redacted]/[redacted] Custom GPTs in ChatGPT so you don't need to copy/paste same prompts daily.

- PROTIP: add **Skills** in **.md workflows** so you can share the Bitrix24 data weekly

Custom GPTs

What Comes After Quick Wins

01

Intelligence System — Automated Market & Deal Signals

Right now you are the central hub for all market intelligence, referrals, Crunchbase searches, LinkedIn scrolling. That doesn't scale.
An automated signal layer does: funding rounds in climate tech across [redacted], [redacted], [redacted], [redacted]; new company registrations in target sectors; client portfolio health with filing deadline alerts; competitor and patent activity. You could get all these signals, every day, in your or your team their inbox.

02

AI Operations Partner — From Tools to an Embedded AI Workforce

You already use ChatGPT as a second brain, so much more is possible nowadays. The next step is deploying AI as an operational team member. Imagine connecting Bitrix24, Zoho, Linkedin, and ChatGPT to an AI Agent and into automated / scheduled workflows that run without you or your team.

03

Speed-to-Lead System — [redacted] / [redacted] Outreach Engine

You manually grow your LinkedIn, [redacted] does outreach in [redacted], [redacted] works [redacted]. There's a lack of coordination.
Automated sequences should be running daily with a unified inbox and CRM auto-sync which systematically scales LinkedIn outreach across all team members' accounts, tied to [redacted]'s [redacted] revenue target and/ or [redacted]'s need to constantly grow investor and client relations to close on deals.

Estimated impact

5-6 hrs

per week

Weekly Time Returned

Across invoicing, cash flow predicting, meetings, reporting, and networking

~$149

per month

Total Tool Cost

Float (~$53/mo) + Expandi ($99/mo)
Zoho Books, Fathom, Bitrix24 = free or owned

$2,000

per month

Estimated Monthly ROI

5 hrs × 4 wks × **$100/hr**
minus tool costs

TOOL	WHAT IT REPLACES	SETUP	TIME SAVED	INVESTMENT
Zoho Books	Manual Word invoices + payment chasing	1-2 hrs	~1 hr/wk	£0 (owned)
Float	Cash flow surprises & payroll anxiety	2-3 hrs	~1 hr/wk	~$50/mo
Fathom AI	Manual meeting notes + ChatGPT uploads	15 min	~0.5-1 hr/wk	$0 (free)
Expandi	Manual LinkedIn outreach, no tracking/coordination	2 hrs	~2-3 hrs/wk	$99/mo
Bitrix24 Digest	Ad hoc team check-ins + information bottleneck	20-30 min	~1-2 hr/wk	£0 (owned)
TOTAL	—	~6-8 hrs	~5-6 hrs/wk	~$149/mo

Next Steps

01 Implement the Quick Wins

Follow the Day 1-4 plan. Start with Zoho Books, getting [redacted]'s [redacted] invoicing on autopilot is probably the single highest-return action on this list.

02 Walkthrough call

15-20 minutes, we can answer any questions.