aiPartners

AI READINESS ASSESSMENT

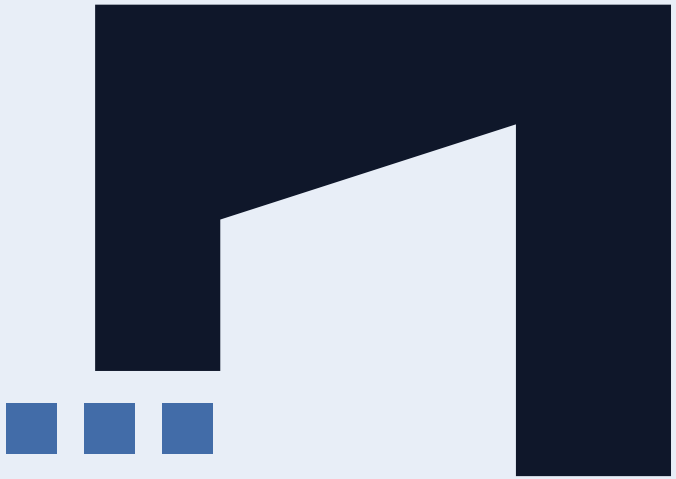
Agency operations

Prepared for

[redacted]

Assessment date

[redacted]



Executive Summary

[redacted], your agency runs almost entirely on manual effort. Every Friday your team pulls data from five platforms per client and rebuilds reporting decks from scratch. Scope conversations turn into free work — [redacted] a month of it. Proposals take three hours to write and start from zero every time. Eight of your eleven people aren't using AI in any consistent way, while you're using it daily.

15-20

HRS / WEEK RECLAIMED

OUTCOME

With four targeted tools and four days of setup, your team stops pulling data by hand, scope requests get a formal process, and HubSpot closes trigger onboarding automatically — without you in the middle. That reclaims 15-20 hours of your team's week. None of the major projects are counted in that number.

CRITICAL PAIN POINTS

- Reporting eats 15-20 hours every week — across every client
- [redacted]/month in scope creep goes unrecovered — [redacted]
- Onboarding runs 3-4 weeks instead of 2, starting with a verbal briefing
- Every proposal starts from scratch — 3 hours, every time
- 8 of 11 team members not using AI in any consistent way

PRIMARY FOCUS

Efficiency

Impact-Effort Matrix

QUICK WINS

Swydo — Reporting Automation
Ignition — Proposals + Scope
ChatGPT Teams — AI Standardisation
Zapier — HubSpot to ClickUp
Slack Scope-Check Workflow

MAJOR PROJECTS

AI Client Intelligence Engine
Agentic Account Management Layer
New Business Automation Engine

← HIGH IMPACT

← LOW EFFORT

HIGH EFFORT →

IGNORE

No low-effort / low-impact items
identified in this engagement

FILL LATER

Advanced multi-tool integrations
Full team AI training programme

← LOW IMPACT

Recommended Solutions

01 Reporting Automation

Swydo

You pull data from five platforms per client every Friday and build reporting decks by hand. Swydo connects all those sources, auto-sends a branded PDF report to every client on schedule, and generates AI performance commentary — no manual pulls, no blank slides.

Complexity: Low · Cost: $69/mo · Setup: 2-3 hrs · Saves: 15-20 hrs/week

02 Scope Creep + Proposals

Ignition

You write every proposal from a blank Google Doc, and scope changes get absorbed because raising a change order feels awkward. Ignition lets you build proposals from a service menu in minutes and send a formal change order from your phone in under two. Replaces PandaDoc.

Complexity: Low · Cost: $99/mo · Setup: 3-4 hrs · Saves: ~2 hrs/proposal

03 AI Standardisation

ChatGPT Teams

You use ChatGPT daily. [redacted] uses Claude. Eight people on your team use nothing consistently. ChatGPT Teams gives everyone the same shared workspace with role-specific GPTs — account managers, media buyers, and reporting all working from the same agency context.

Complexity: Low · Cost: $120/mo (4 seats) · Setup: 2-3 hrs · Saves: est. 1-2 hrs/week rework

04 Sales-to-Ops Handoff

Zapier (pre-built template)

When a deal closes in HubSpot you brief [redacted] verbally — and the onboarding clock hasn't started yet. A pre-built Zapier template creates the full ClickUp onboarding project the moment the deal closes: tasks assigned, day-3 and day-7 reminders set, [redacted] notified.

Complexity: Low · Cost: $11-30/mo · Setup: 20 min · Saves: 2+ weeks per onboarding

Quick Wins Plan — Day 1 to Day 4

Day 1

Slack Scope-Check Workflow

Create [redacted] channel. Build a 3-field form: client name, request, estimated hours. Account managers flag out-of-scope requests instead of absorbing them. [redacted] responds with one emoji.

+ HubSpot → ClickUp Automation

Configure the pre-built Zapier template. Deal closes → onboarding project auto-creates with full task list and day-3/7 reminders.

Slack Workflows

Zapier

Day 2

Swydo — Reporting Setup

Sign up, connect Meta Ads, Google Ads, GA4, SEMrush, and Klaviyo. Build your first client dashboard as a pilot — confirm the data pulls correctly and the branded PDF template looks right.

Once the pilot is approved, the [redacted] follow the same pattern. Friday reporting becomes review-and-send.

Swydo

Day 3

Ignition — Proposals + Change Orders

Build your service menu: retainer tiers, add-ons, packages. Create your first proposal template from it.

Configure the change order flow. Send one test change order to yourself — confirm the client approval flow works end to end.

Migrate one active proposal as the live pilot.

Ignition

Day 4

ChatGPT Teams — Agency AI Workspace

Create the Teams workspace. Add [redacted] + 3 account managers.

Deploy the Account Manager GPT: pre-loaded with [redacted] agency voice, 10 standard prompts for performance commentary, client emails, and out-of-scope response templates.

Team is live on shared AI from Day 4.

ChatGPT Teams

What Comes After Quick Wins

01

AI Client Intelligence Engine

Right now reporting tells you what happened. This system tells you what's about to go wrong. A custom Make.com + AI build monitors campaign performance across [redacted], flags underperformers before they notice, and delivers a weekly digest with drafted commentary already written. You review and send — the analysis is done for you.

02

Agentic Account Management Layer

Your account managers handle [redacted] reactively. An AI co-pilot changes that. A custom Slack + ClickUp + GPT-4 build surfaces client health signals, drafts proactive check-in messages when campaigns dip, logs decisions automatically, and keeps every account manager two steps ahead — without [redacted] in the relay.

03

New Business Automation Engine

[redacted] is growing and your own outbound pipeline runs manually. A custom outreach system — automated LinkedIn sequences, email nurture, and HubSpot lead scoring — means [redacted] is always in market, qualifying and converting new clients while the team delivers for existing ones.

Estimated impact

~840% ROI

15-20 hrs

per week

Weekly Time Returned

~$318

per month

Total Tool Investment

$2,700+

per month

Est. Monthly ROI

TOOL	REPLACES	SETUP	SAVES / WEEK	MONTHLY COST
Swydo	Friday afternoons lost to manual data pulls	2-3 hrs	15-20 hrs	**$69/mo**
Ignition	Scope conversations that cost [redacted] and go nowhere	3-4 hrs	~2 hrs/proposal	**$99/mo**
ChatGPT Teams	8 team members working without AI context or standard	2-3 hrs	est. 1-2 hrs/week rework	**$120/mo (4 seats)**
Zapier	[redacted] as the bottleneck between every closed deal and every start	20 min	2 wks/onboarding*	**$30/mo**
Slack Workflows	Scope changes absorbed silently because no formal process exists	30-45 min	est. 1-2 hrs/week	**$0**
TOTAL		**~8-11 hrs**	**~17-22 hrs/week***	**~$318/mo**

ROI = (Monthly time value – tool cost) ÷ tool cost · Assumes $50/hr blended team rate · *Per-event savings excluded from weekly total

Next Steps

01

Implement the Quick Wins

Follow the Day 1-4 plan. Start with the Slack scope-check workflow and the Zapier automation — both can be running in under an hour, at zero cost, before anything else is touched. The other two days follow the same pattern: short setup, immediate return.

02

Book the Implementation Kickoff

Confirm your Agency Analytics plan tier and decide on the reporting platform. Schedule the done-for-you dashboard build — 30 to 40 hours across one to two weeks. [redacted] connected, Friday reporting automated, account managers trained.