

OPERATIONAL SYSTEMS REVIEW

Clear Cut Systems Audit

Lead, Operations & Efficiency Review

PREPARED FOR

ABC Heating Ltd

DATE OF ISSUE

17 July 2026

PREPARED BY

Clear Cut Creative

REFERENCE

CCA-2026-0717

CLIENT
LOGO



NAVIGATION

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● Priority commercial sections

ABOUT THIS AUDIT

This report is a paid operational review of how your business captures leads, follows up and converts work. It isolates where revenue leaks, where time is lost, and where risk sits — then sets a clear, staged path to fix it.

METHOD

Findings are scored against the **Clear Cut 7P framework** — Pipeline, People, Process, Presence, Pace, Protection and Profit — for a single, comparable efficiency score.

- Prepared solely for the named client. Figures are estimates based on information reviewed and should be treated as directional.

01 COMPANY CONTEXT

Business Snapshot

The operating context this audit was conducted against. Every finding that follows is grounded in these inputs.

INDUSTRY [Home improvement]	TEAM SIZE [8 people]	DECISION MAKER(S) [Owner / Director]	MONTHLY LEAD VOLUME [120 / mo]
AVERAGE CUSTOMER VALUE [£2,400]	MONTHLY TURNOVER · OPTIONAL [£95,000]	GROWTH GOAL [+40% in 12 mo]	CONFIDENCE SCORE [6 / 10]

LEAD SOURCES

[Google]

[Referrals]

[Facebook]

[Website]

[Repeat]

CURRENT SOFTWARE STACK

[Gmail]

[WhatsApp]

[Spreadsheets]

[Xero]

KEY OPERATIONAL BOTTLENECKS

- 01 [Bottleneck one — the single biggest constraint]
- 02 [Bottleneck two]
- 03 [Bottleneck three]

OWNER CONFIDENCE TODAY

6 / 10

02

OPERATIONAL OVERVIEW

Executive Summary

RISK LEVEL	LEAK SEVERITY	GROWTH READINESS	AUTOMATION READINESS
Elevated	High	Moderate	High

[One-paragraph headline. Summarise the single most important finding — where the business is losing the most, and what fixing it would unlock over the next quarter.]

7P EFFICIENCY SCORE	MONTHLY REVENUE LEAK	TIME LOST / WEEK	QUICK WINS AVAILABLE
36/70	£5,900	15.5hrs	6

STRENGTHS

- [Strength one — what already works well]
- [Strength two]

WEAKNESSES

- [Weakness one — where the system breaks down]
- [Weakness two]

MAJOR RISKS

- [Risk one — highest exposure]
- [Risk two]

REVENUE LEAKS

- [Leak one — largest £ impact]
- [Leak two]

INEFFICIENCIES

- [Inefficiency one — repeated manual work]
- [Inefficiency two]

QUICK WINS

- [Quick win one — fixable within 48 hours]
- [Quick win two]

03

DIAGNOSTIC

Audit Scorecard

CLEAR CUT 7P EFFICIENCY SCORE

36

/70

RATING · AT RISK

Foundations are workable but leaking.
Targeted fixes lift this above 50 / 70 within
one quarter.

RATING SCALE

- Strong** 8–10 · low risk
- Moderate** 6–7 · watch
- At Risk** 4–5 · act soon
- Critical** 0–3 · urgent

DIMENSION	SCORE	RISK	NOTES
Pipeline Lead flow & capture	5/10	AT RISK	[Note — where leads originate and drop]
People Roles & responsiveness	7/10	MODERATE	[Note — capacity & ownership]
Process Repeatable workflows	4/10	AT RISK	[Note — documentation & consistency]
Presence Web & first impression	6/10	MODERATE	[Note — clarity & conversion path]
Pace Speed of response	5/10	AT RISK	[Note — time-to-first-reply]
Protection Risk & continuity	3/10	CRITICAL	[Note — owner dependency & data]
Profit Margin & conversion	6/10	MODERATE	[Note — quote-to-win & pricing]

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WHERE MONEY IS LOST

Revenue Leak Analysis

Each line estimates revenue slipping away every month through a specific gap in lead handling. Figures are directional and based on the information reviewed.

LEAK SOURCE	ROOT CAUSE	CONFIDENCE	EST. / MONTH
Missed calls	[No missed-call recovery process]	● High	£1,200
Delayed response	[No instant-response automation on new leads]	● High	£850
Poor follow-up	[No structured multi-touch follow-up sequence]	● High	£1,600
Lost referrals	[No systematic referral request at completion]	● Medium	£600
Old lead decay	[Past & dormant enquiries never re-engaged]	● Medium	£950
Untracked opportunities	[No CRM — leads sit in inbox & notes]	● Medium	£700

ESTIMATED MONTHLY REVENUE LEAKAGE

Recoverable with the implementations in Section 09.

£5,900

≈ £70,800 / year

05

WHERE HOURS ARE LOST

Time Waste Analysis

Manual and repeated work that could be automated or removed. Hours below are estimated per week across the team.

ACTIVITY	RELATIVE LOAD	HRS / WEEK
Manual admin [Data entry, re-typing, chasing]		4.0
Duplicated tasks [Same info entered in two places]		2.0
Repeated communication [Answering the same questions]		3.0
Scheduling [Back-and-forth to book time]		2.0
Quoting [Building quotes from scratch]		3.0
Reminders [Manually chasing appointments & payments]		1.5

ESTIMATED WEEKLY HOURS LOST

Roughly two full working days, every week.

15.5

hrs / week

~2

days / week

06

FRAGILITY & CONTINUITY

Risk Exposure Analysis

OVERALL OPERATIONAL RISK RATING

Driven primarily by owner dependency and the absence of a single source of truth for customer data.



Elevated

RISK AREA	EXPOSURE & IMPACT	RATING
Owner dependency	[Key knowledge and relationships sit with one person; little can run without them.]	CRITICAL
No CRM visibility	[No shared view of leads, stages or history; nothing is reportable.]	CRITICAL
Undocumented processes	[Work runs on memory; onboarding and delegation are slow and error-prone.]	HIGH
Communication breakdowns	[Messages across channels get missed; handovers are informal.]	HIGH
Inconsistent experience	[Customer journey varies by who handles it; quality is unpredictable.]	MODERATE

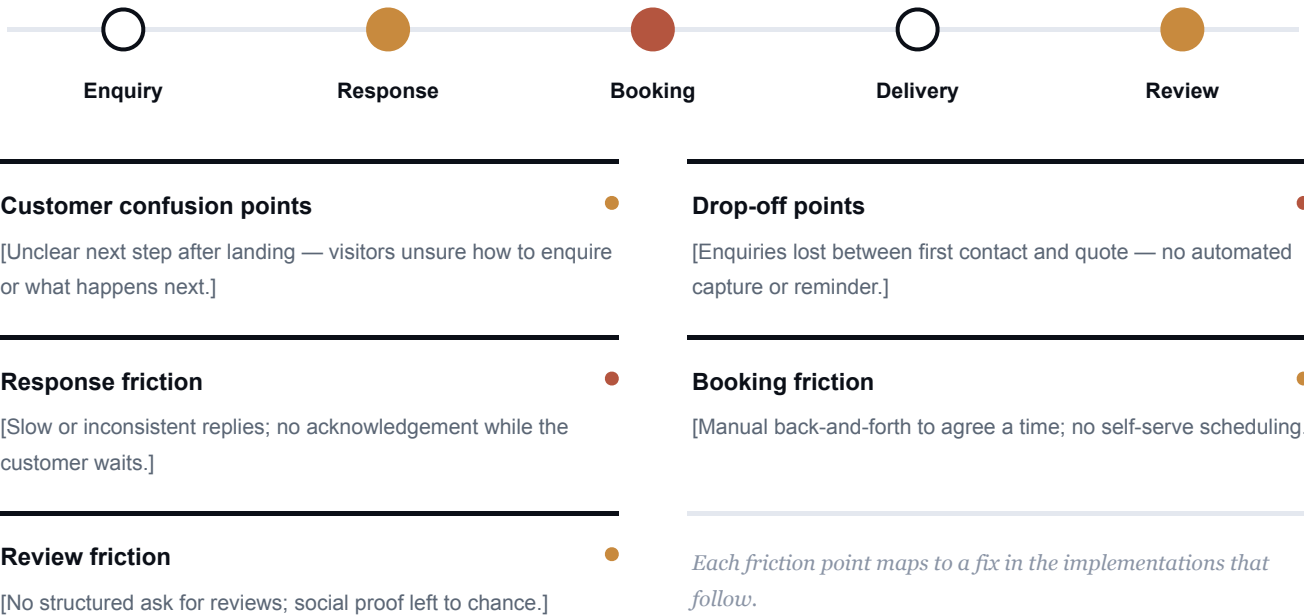
Risk here is concentrated, not spread — which is good news. Two fixes (a CRM as the single source of truth, and documented core processes) remove the majority of exposure.

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THE CLIENT'S-EYE VIEW

Customer Experience Friction

Where the customer journey stalls — the moments that quietly cost enquiries, bookings and reviews.



08

WHERE AI CREATES LEVERAGE

AI & Automation Opportunities

Applied deliberately, AI removes repetitive work and sharpens response — without losing the human relationship. These are the highest-leverage points in your operation.

OPPORTUNITY AREA	WHERE IT CREATES LEVERAGE	LEVERAGE
Admin automation	[Auto-log jobs, invoices and data entry across your tools]	● High
Lead qualification	[Score and route new enquiries by intent and value]	● High
Enquiry triage	[AI first-response that answers common questions instantly]	● High
Customer communication	[Drafted replies, updates and follow-ups in your voice]	● Medium
Review generation	[Trigger and personalise review requests automatically]	● Medium
Appointment booking	[Self-serve scheduling with AI reminders and rescheduling]	● Medium
Internal knowledge systems	[Searchable single source for process and job history]	● Medium

HIGHEST IMMEDIATE LEVERAGE

Admin automation + enquiry triage

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The fastest, highest-value starting point identified in this audit — low effort, immediate return.

of 7 automation-ready

09

FROM DIAGNOSIS TO ACTION

Recommended Implementations

Ordered by priority. Work top to bottom — each builds on the last.

IMPLEMENT IN SEQUENCE 1 → 4

PRIORITY 1

Instant lead capture & response

Suggested tool: GoHighLevel / Zapier

Problem — [New enquiries wait hours; some are missed entirely.]

Fix — [Auto-reply + missed-call text-back within 60 seconds, logged to CRM.]

IMPACT	REVENUE	TIME SAVED	ROI TIMEFRAME	COMPLEXITY
High	+£2,050 / mo	4 hrs / wk	30–60 days	Moderate
Dependencies [Phone / VOIP + enquiry form access]			EST. BUILD INVESTMENT	£1,500–£2,500

PRIORITY 2

CRM & pipeline single source of truth

Suggested tool: HubSpot / Pipedrive

Problem — [Leads live in an inbox and notebook; nothing is tracked.]

Fix — [One pipeline with stages, owners and automated follow-up reminders.]

IMPACT	REVENUE	TIME SAVED	ROI TIMEFRAME	COMPLEXITY
High	+£1,600 / mo	5 hrs / wk	60–90 days	Advanced
Dependencies [Data migration from inbox & spreadsheets]			EST. BUILD INVESTMENT	£2,500–£5,000

PRIORITY 3

Automated quoting & scheduling

Suggested tool: Calendly / Quote templates

Problem — [Quotes and bookings built from scratch with manual back-and-forth.]

Fix — [Templated quotes and self-serve scheduling with reminders.]

IMPACT	REVENUE	TIME SAVED	ROI TIMEFRAME	COMPLEXITY
Medium	+£700 / mo	5 hrs / wk	30–45 days	Simple
Dependencies [CRM setup — Priority 2]			EST. BUILD INVESTMENT	£750–£1,250

PRIORITY 4

Review & referral engine

Suggested tool: NiceJob / automated requests

Problem — [Reviews and referrals depend on remembering to ask.]

Fix — [Automated review request and referral prompt after every job.]

IMPACT	REVENUE	TIME SAVED	ROI TIMEFRAME	COMPLEXITY
Medium	+£600 / mo	1.5 hrs / wk	14–30 days	Simple
Dependencies [Completed-job trigger from CRM]			EST. BUILD INVESTMENT	£750–£1,250

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MOMENTUM IN TWO DAYS

Quick Wins · First 48 Hours

Low-effort, high-signal changes that can be live within two days. Tick each as it goes live.

☐ Client ☒ Clear Cut

☐	Missed-call text-back Auto-text every missed call so no enquiry goes cold.	CLEAR CUT	HIGH IMPACT
☐	Instant enquiry replies Auto-acknowledge every form and email within seconds.	CLEAR CUT	HIGH IMPACT
☐	WhatsApp automation Templated responses and quick replies for common questions.	CLEAR CUT	MEDIUM IMPACT
☐	Lead tagging Tag every new lead by source and status from day one.	CLIENT	MEDIUM IMPACT
☐	Automated reminders Appointment and payment reminders sent without manual chasing.	CLEAR CUT	MEDIUM IMPACT
☐	Review requests Trigger a review ask automatically after each completed job.	CLIENT	HIGH IMPACT

These six alone recover an estimated £2,300 / month while the wider build is scoped.

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THE PATH FORWARD

90-Day Roadmap

1

MONTH 1

Stabilise

OBJECTIVES

[Stop the biggest leaks and capture every lead.]

ACTIONS

- [Deploy 48-hour quick wins]
- [Stand up CRM & pipeline]
- [Instant response live]

2

MONTH 2

Automate

OBJECTIVES

[Remove manual work and standardise follow-up.]

ACTIONS

- [Automated follow-up sequences]
- [Quoting & scheduling live]
- [Review & referral engine]

3

MONTH 3

Optimise

OBJECTIVES

[Tune conversion and make results visible.]

ACTIONS

- [Reporting dashboard]
- [Refine sequences on data]
- [Document core processes]

OUTCOME

[No lead missed; every enquiry tracked.]

OUTCOME

[~15 hrs/week returned to the team.]

OUTCOME

[A predictable, self-running lead engine.]

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THE COMMERCIAL CASE

Financial Impact Forecast

12-MONTH PROJECTED UPSIDE

Combined effect of recovered revenue and time saved, once the roadmap is in place.

£70,800

before efficiency gains · directional

IMPACT AREA	PER MONTH	PER YEAR
Revenue recovered [Faster response & structured follow-up]	£4,500	£54,000
Time saved (value) [~12 hrs/week returned to billable work]	£1,400	£16,800
Admin reduced [Automation of repeated tasks]	£600	£7,200
Improved conversion [Higher quote-to-win from consistency]	Upside	+3–6 pts
Reduced risk [Owner independence & data continuity]	Qualitative	Elevated → Low

ESTIMATED ANNUAL UPSIDE
Recovered revenue + time saved

£78,000

COST OF INACTION

If nothing changes, the business could continue leaking approximately this range over the next 12 months.

£70,800 – £95,000

estimated 12-month leakage if unaddressed

Figures are directional estimates based on information reviewed and assume the 90-day roadmap is followed. Actual results vary with lead volume and average job value.

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YOUR OPTIONS FROM HERE

Next Steps

You have the full picture. There are two ways forward — take it in-house, or have us build it with you in staged tiers. Both are valid; choose the pace that suits you.

OPTION A Self-implementation

Take this report and run with it internally — the priorities, tools and 90-day plan are all documented.

Best if you have internal capacity & time.

OPTION B Clear Cut implementation support — done with you, in three staged tiers.

RECOMMENDED BASED ON THIS AUDIT

Tier 01 · Stabilise

begin here, then progress at your pace

TIER 01

Stabilise

Fastest operational fixes — stop the leaks and capture every lead.

- Deploy 48-hour quick wins
- Instant lead capture & response
- No enquiry missed or untracked

TIER 02

Automate

Systemise follow-up, admin and lead handling end to end.

- CRM & pipeline as source of truth
- Automated follow-up & scheduling
- ~15 hrs / week returned

TIER 03

MOST COMPLETE

Scale

Full optimisation, AI implementation and growth infrastructure.

- AI triage, qualification & comms
- Reporting & documented processes
- A predictable, self-running engine

- Your audit fee can be credited against implementation if started within 30 days.

TO TAKE THE NEXT STEP

Reply to this report, or book a short call to walk through the priorities together.

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