

AI Tools Assessment

Prepared for XXXXXX

Assessment Date: 2025-12-23

Executive Summary

Pain

Manual marketing reporting, lost meeting action items, and design task interruptions are consuming valuable time and creating friction in an otherwise well-run business.

Outcome

Targeted tool additions and better process automation can return 8+ hours per week by eliminating manual steps and protecting strategic focus time.

The Opportunity at a Glance

8

Hours You Can Reclaim Weekly

Primary Focus: Efficiency (Time Savings)

Impact-Effort Matrix

Your pain points have been analyzed and placed into four quadrants based on their business impact and implementation effort. This report focuses on Quick Wins — the fixes that deliver the highest value with the least effort.



Quick Wins (High Impact, Low Effort)

- *Manual marketing reporting across multiple platforms* → Implement DashThis to auto-pull all marketing data into one dashboard
- *No consistent meeting notes or action item capture* → Set up EFathom to auto-join meetings and extract action items
- *Email overload with noise and sales outreach* → Deploy SaneBox to auto-filter unimportant emails to SaneLater folder
- *Low-level design tasks pulling from strategic work* → Train XXXXX on Canva's Magic Design AI and create brand kit templates

Recommended Solutions

1

No consistent meeting notes or action item capture

Recommended Tool: Fathom.ai

Why This Fits: Automatically joins meetings, captures transcripts, and extracts action items so nothing is lost after calls. Integrates with Asana for task handoff.

- **Complexity:** plug-and-play
- **Monthly Cost:** \$0-10/user
- **Setup Time:** 15 minutes
- **Time Saved:** 2 hours/week

2

Email overload with noise and sales outreach

Recommended Tool: SaneBox

Why This Fits: Learns which emails matter and moves the rest to SaneLater, dramatically reducing inbox clutter without changing workflow.

- **Complexity:** plug-and-play
- **Monthly Cost:** \$7
- **Setup Time:** 10 minutes
- **Time Saved:** 3 hours/week

3

Manual marketing reporting across multiple platforms

Recommended Tool: DashThis

Why This Fits: Consolidates Google Analytics, Meta Ads, Google Ads, and scheduling platforms into one auto-updating dashboard—eliminating manual reporting.

- **Complexity:** some-setup
- **Monthly Cost:** \$42
- **Setup Time:** 1-2 hours
- **Time Saved:** 2 hours/week

4

Low-level design tasks pulling from strategic work

Recommended Tool: Canva Magic Design + Brand Kit

Why This Fits: Creates on-brand templates once so recurring designs can be handled without leadership involvement.

- **Complexity:** some-setup
- **Monthly Cost:** \$0 (already using)
- **Setup Time:** 1-2 hours
- **Time Saved:** 2 hours/week

Your 4-Day Quick Wins Plan

1 Day 1

Task: Set up Fathom and connect to Google Calendar

Tool: Fathom

2 Day 2

Task: Set up SaneBox and connect to Gmail

Tool: SaneBox

3 Day 3

Task: Create Canva Brand Kit with colors, fonts, and logos

Tool: Canva

4 Day 4

Task: Sign up for DashThis and connect Google Analytics

Tool: DashThis

What Comes After Quick Wins

01

*Set up **GoHighLevel CRM** to consolidate leads and streamline sales communication*

02

*Create a **Brand Voice Claude Skill** to consistently create content in your voice/style*

03

*Set up a **Custom GPT** for airBnB customers to handle FAQs, local recommendations, and more*

Financial Impact

Weekly Time Returned

8 hours

Monthly Net ROI

\$3,141



Total monthly tool cost: \$59

Your Next Steps

1 Implement the 4 Quick Wins

Follow the plan exactly as outlined to reclaim time and stabilize operations.

2 Schedule a 30-minute Review Call

We'll review results, validate wins, and decide if deeper automation is warranted.

Schedule Your Review C