Iterategy

ITERATEGY

AI Operations Audit: a branding and marketing agency

Prepared for

Windrow Collective (SAMPLE, a fictional business)

SAMPLE. A FICTIONAL BUSINESS, SHOWN AS AN EXAMPLE

Prepared **2026-09-01**
Order **SAMPLE-WINDROW**

Contents

Every section starts on its own page. Page numbers below are the numbers printed at the foot of each page.

29 pages including the cover. The cover is not numbered, so the numbers above are the ones printed at the foot of each page.

1. Read this first

This sample audit describes a fictional six-person branding and marketing agency in Boise, invented so that a real buyer can see exactly what she would receive. Every person, client and number in it is made up. The method, the sources and the arithmetic are real, and they are the same ones a paying order gets.

What this is. You bought a look at where your week goes and what it costs, with a number on every finding and the arithmetic printed beside it. This is that document. You can disagree with any number in it; the working is shown so that disagreeing rescales the answer rather than throwing it out.

What we found, in the order we would fix it.

1. **You build two client reports by hand every month, and you already pay $99 a month for the tool that builds them.** The dashboards for those two clients were never set up. Worth **$7,837 a year**.
2. **You chase overdue invoices yourself, and your accounting plan already has reminders built in and switched off.** Worth **$6,899 a year** in your time.
3. **Retainer hours get retyped from one place to the next and the tracker is wrong within days.** Worth **$4,987 a year**.
4. **About 16 hours a month of work you deliver is never invoiced, because the record it would be billed from does not exist.** Worth **$4,176 a year**, and it is the same fix as number 3.
5. **Every proposal gets rebuilt from an old document while a $49 a month proposal tool sits unused.** Worth **$3,571 a year**.
6. **That $99 and that $49 are $148 a month you already spend on two tools that do two of the jobs above.** Counted at nothing, because it pays for the plan rather than being a saving on top of it.

What matters most, and why it is first. The reporting one. It is not the biggest number by much, but it is the only one where you are already paying a monthly bill for the exact tool that does the job and nobody ever finished setting it up. We checked every channel those two clients run, one at a time, against the tool's live connector list on 2026-09-01. All seven are supported. There is nothing to buy, nothing to migrate and nothing to decide. It is an afternoon.

What it adds up to. 6.8 hours a week of yours and 2.6 of your team's, and $27,470 a year. Even counting only what we're certain of: $19,723/yr.

And the whole plan is paid for by money you are already spending on tools you do not use. Not one recommendation in this report asks you to spend a dollar you are not spending today. The one place that could have needed money, a trustworthy record of who worked which hour, turned out to be a setting inside the accounting plan you already have.

One thing we will not round up. You asked what you would do with ten hours a week back. We found between five and eight of yours, and our arithmetic lands at 6.8. Half of that is the reporting and the invoice chasing. It is not ten. We would rather hand you a number you can hold us to than the one you asked for.

And one answer you did not expect. You told us two clients pay 30 to 45 days out and that it is just how those companies pay. You are right about one of them and wrong about the other, and their twelve invoice dates show which is which. It is in finding 2.

What happens next. Section 6 is a week-by-week plan you can start on Monday, free things first. Your questions are answered free for two weeks: reply to the email this arrived with.

2. What we looked at, and how

What you gave us. Your intake form, submitted 2026-09-01, all 34 answers. A follow-up question set answered in your own words the same day, covering retainer terms, a typical week's hours, your aging report, twelve dated invoice rows for the two clients who pay late, your reporting and proposal setup, your plan names, a count of out-of-scope asks, and what your people cost. Three things you sent over: your proposal template, one client report as delivered, and your Master Tracker export as it stood, not tidied first. You offered read-only access to your accounting and your task tool; this audit did not need to use it, and the offer is still open if you want any number below re-derived from the source.

What we did not look at, because you asked us not to. Your CRM. You said the prospects in it do not know they are being discussed. Nothing in this report depends on it.

What we counted, and how you can re-count it. Every count below can be re-run by you.

What we counted	Where it came from	How to check it yourself
16 hours a month delivered beyond retainer	your Master Tracker export	Add up only the clients whose used hours exceed their sold hours. Do not subtract the ones under.
40.8 and 44.8 days to pay	your twelve invoice rows	Days from invoice date to payment date, for the five paid rows on each client.
Day 10.5 and day 1.5	the same twelve rows	The day of the month each invoice was dated, averaged.
48.6 days outstanding overall	your aging summary and your revenue	$112,400 divided by $844,000, times 365.
$844,000 a year	your own figures	8 retainers at $6,500 a month, plus about 10 projects a year at about $22,000.
14.5 hours a week of admin	your hours answers	The four rows you filled in, yours plus your team's.

How the money was worked out. Hours times a loaded hourly rate times 50 weeks. The rates are in Section 7, all three of them, with their sources. Where your own payroll figure was lower than the published Boise figure, yours was used. That happened once and it took about $1,300 a year out of the largest finding.

As is, from inquiry to cash

Someone finds you by referral or on a professional network and books an intro call through your booking link. If it is a fit, you rebuild a proposal from an old document, usually late at night. They say yes by email. You open a project in your task tool and bring in contractors. Work happens, you approve it, you deliver. At month end or on project completion you create the invoice in your accounting system and email it. Then you wait, and follow up once, sometimes three or four times.

Four places the same fact is typed twice or more.

1. Hours worked, from your task tool's time entries into the Master Tracker.

2. The Master Tracker figure into the invoice.
3. Platform numbers, screenshotted out of six ad and analytics tools into two slide decks.
4. Project status, out of the task tool and into client-facing recaps.

Three places work stops.

1. A client asks for something extra. It gets delivered. It does not reach an invoice unless you personally remember. About 16 hours a month go this way.
2. An invoice goes out. Nobody chases it but you, and only when you notice.
3. Retainer invoices for one client go out around the 10th of the following month, for work finished up to six weeks earlier.

The eleven manual jobs running weekly or more

#	Process	Trigger	Inputs	Outputs	Current tool	Hrs/wk	Maps to
1	Chasing overdue invoices, checking who owes what	an invoice passes its due date	aging report, memory	follow-up emails	accounting, email	3.5	finding 2
2	Updating the Master Tracker, squaring it against the books	weekly, again at month end	time entries, memory	tracker rows, invoice hours	spreadsheet, task tool, accounting	2.5	finding 3
3	Building the two manual client reports	monthly reporting cycle	six ad and analytics platforms, invoices	two 14-slide decks	slides, ad platforms	4.5	finding 1
4	Writing a proposal from the old document	a prospect asks for one	old template, case study bank	9-page proposal	documents	4.0	finding 5
5	Delivering extras that never reach an invoice	a client asks beyond the retainer	the ask	delivered work, no invoice line	task tool, chat	3.7 delivered	finding 4
6	Reconstructing retainer hours from memory	month end, record incomplete	memory, partial entries	tracker number, invoice line	spreadsheet	inside row 2	findings 3 and 4
7	Creating and emailing about 12 invoices	month end, project completion	tracker hours	invoices	accounting	not separately stated	inherent work
8	Monthly books reconciliation	month end	bank feed, invoices	reconciled ledger	accounting	5.0, bookkeeper	Section 4

#	Process	Trigger	Inputs	Outputs	Current tool	Hrs/wk	Maps to
9	Re-entering project status into client recaps	client check-in	task tool	recap message	task tool, chat, email	not separately stated	Section 4
10	First drafts of captions, outlines, ad copy	content calendar	brief	drafts	assistant	not separately stated	Section 4, already working
11	Booking intro calls	inbound inquiry	booking link	booked call	booking tool, calendar	not separately stated	Section 4, already automated

Rows 1 to 4 total 14.5 hours a week, 10.5 of them yours. That is the universe this report draws from. Row 5 is client work rather than admin, shown separately so it is not counted twice. Row 8 is your bookkeeper’s whole engagement and is counted at nothing throughout.

3. The six findings, in payback order

Ranked by return per hour of your effort, not by size. Every finding carries the arithmetic, a one-word verdict, and the dated source that settles it.

Finding 1. Two clients get hand-built reports while the reporting tool you pay for sits with their dashboards never built

In your words: “AgencyAnalytics for reporting, which I pay for but haven’t fully set up”, and “two client dashboards never got built”.

What it costs today.

- You: 2.5 hrs/wk x $57.49 x 50 = **$7,186**
- Your coordinator: 2.0 hrs/wk x $26.10 x 50 = **$2,610**
- **Total: $9,796 a year** to hand-build two monthly reports.

Recoverable at 80%: $7,837 a year. That returns 2.0 of your hours a week and 1.6 of your coordinator’s.

Verdict: configuration. Not a product limit, not a habit. The tool does this job and it was never switched on for these two clients.

What settles it, checked one channel at a time on 2026-09-01. The question that decides this finding is whether the tool can actually connect to what those two clients run. Both clients’ channels were checked against the vendor’s live integration pages:

Channel	Client	Supported?
Meta Ads	A	Yes
Google Ads	A and C	Yes
Google Business Profile, 3 locations	A	Yes
Instagram, organic	A	Yes
GA4	C	Yes
LinkedIn Ads	C	Yes

All seven are native connectors. Had one failed, this finding would have changed shape and we would have said so.

What you already own and are not using. AgencyAnalytics, entry plan, $99 a month. Unused feature: the two client dashboards themselves, plus scheduled delivery. Four dashboards are already built and working for four other clients, which means you have done this exact task four times and it works.

The fix, and how long it takes. About three hours of your coordinator's time, once.

1. Connect the four sources for Client A and the three for Client C. Note that the Meta Ads connection for Client A failed twice in early 2025 and you gave up. That platform's permissions have changed since; treat it as a fresh connection, not a retry.
2. Copy the layout from one of your four working dashboards.
3. Add a text box for your commentary and an image widget for the creative that ran. Images take SVG, PNG or JPEG up to 1MB.
4. Put your logo and colors on it, and set it to send on a schedule.

What the tool will not do, and this is the 20% we did not claim. It will not write your three commentary slides; it hosts them, you still write them. And it will not reconcile spend against what each client was invoiced. That is your two reconciliation slides, and the only route is typing the invoiced figure into a text box each cycle. We did not check whether the vendor has an accounting connector that would close that gap, and we are not going to assume one.

Before you build: read your billing page. Your $99 does not match any plan this vendor publishes today or has published in the past. They replaced their three tiers with a single per-client plan between 2026-04-18 and 2026-05-15, at $20 per client per month billed annually or $25 billed monthly. You are most likely on a retired plan. Two things follow. First, check your client allowance covers six, since you have four dashboards and want two more; your own note says it allows more than you are using. Second, **do not migrate**. Six clients on the current plan is $120 or $150 a month, against the $99 you pay now. Staying where you are is cheaper.

Finding 2. Overdue invoices are chased by hand, by you, and the reminders you already pay for are switched off

In your words: "I'm the one who has to notice it's overdue and chase it, there's no automatic reminder happening." And, separately: "What I actually want is something that chases the invoice for me so I never have to think about it."

What it costs today.

- You: 3.0 hrs/wk x $57.49 x 50 = **$8,624 a year**
- Your bookkeeper's half hour a week is not counted. Freeing it does not change what you pay her.

Recoverable at 80%: $6,899 a year. That returns 2.4 of your hours a week.

Verdict: configuration, with one honest limit. Automatic payment reminders are on your accounting plan and are off today. You can turn them on this afternoon. But there is something the software cannot do, and you told us it matters, so we are telling you before you find out.

The limit, stated plainly. You also wrote: “I don’t want anything that auto-sends a client email without me seeing it first, at least not yet.” **Your accounting system cannot hold a reminder for your approval before it goes out. That mode does not exist, on your plan or on any plan.** Its help documentation has exactly two settings, automatic and manual, and manual means finding each invoice yourself. The desktop version of the same product does have a “Review and send” queue; the online version has no equivalent. Upgrading to the top tier at $340 a month does not buy it either. We checked all three on 2026-09-01.

So the fix is the other shape, and it still answers both of your sentences.

Approve once, then run, with a human escalation lane. Four parts:

1. **You write the words.** All three reminder texts, subject line and body, in your own voice. Both are fully editable and you can drop in the invoice number and the client’s name automatically. Nothing goes to a client in language you have not written and approved. **That is what “seeing it first” becomes: you see every word before any of them exists, rather than one at a time.** You turned a reminder on for one client a year ago and killed it the same day because it read like a collections notice. It read that way because it was theirs. This one is yours.
2. **You watch it for two weeks first.** Days 1 to 14, leave the automatic setting off and send those exact three texts by hand from the invoice list. Same words, same timing, your finger on the button. You see them land on real clients. On day 15 you switch the toggle. Your own sentence was “at least not yet”, so this is the “yet”.
3. **Schedule: three reminders, no more.** Reminder 1 three days before due. Reminder 2 three days after. Reminder 3 ten days after. Your plan supports up to three, at any offset up to 90 days.
4. **The fourth touch is you, on the phone.** Anything still unpaid after reminder 3 is a conversation, not a message. That is client relationship communication and this report does not automate it.

Two things the settings will not do, so you can decide with your eyes open. The templates are global, so you cannot give one client a gentler cadence or exempt them. And changes are not retroactive; they apply to future reminders only.

Now the question you asked us not to ask. You told us two clients run 30 to 45 days out and that it is just how those companies pay, not something on your end. **You are right about one of them and wrong about the other.** Here are your own twelve rows.

Client B: you are right. There is nothing to fix and we are not going to invent something.

Invoiced	Day of month	Paid	Days
2026-03-02	2	2026-04-15	44
2026-04-01	1	2026-05-16	45

Invoiced	Day of month	Paid	Days
2026-05-01	1	2026-06-15	45
2026-06-01	1	2026-07-17	46
2026-07-01	1	2026-08-14	44
2026-08-03	3	unpaid	29 so far

You invoice them on the first of the month, every month, without fail. They pay in 44 to 46 days, mean 44.8. Their accounts payable department told you they run a 45-day cycle regardless of what the invoice says, and six rows agree with them. **Reminders will not move this and you should expect them not to.** When reminder 3 lands on this client every month and nothing happens, that is not the setting failing.

Client A: about ten and a half days of it is yours.

Invoiced	Day of month	Paid	Days
2026-03-11	11	2026-04-21	41
2026-04-09	9	2026-05-18	39
2026-05-12	12	2026-06-24	43
2026-06-08	8	2026-07-17	39
2026-07-13	13	2026-08-24	42
2026-08-10	10	unpaid	22 so far

They pay in 40.8 days on average, which is genuinely slow against your net 30. But look at the left column: **you invoice them on day 10.5 of the month, on average, for the previous month’s work.** Every month, not only the slammed ones. That ten and a half days sits before the invoice exists, so no client behavior causes it and no reminder can shorten it.

Counted end to end, this client is your slowest, not your second slowest. Work done mid-month waits about 15 days for the month to end, another 10.5 for the invoice, then 40.8 to be paid. Client B, who looks worse, is faster from work to cash because you invoice them on the first.

The fix for that half is a calendar entry, not software. Invoice the retainers on the last working day of the month they cover.

The cash this releases, shown separately because it is not the same kind of money. Ten and a half days of Client A’s $84,000 a year is **$2,416, once**. If your other six retainers run on the same rhythm, and your own note that “when I’m slammed the retainer invoices go out a week or two into the next month” suggests they do, the total is **up to $15,189, once**. **This is not in the $27,470.** It is cash arriving earlier, not cash arriving that was not coming. It happens one time, in the month you change the rhythm. The recurring part of this finding is your 2.4 hours a week and that is what the number above counts.

Finding 3. Retainer hours are retyped from one system to the next, and the tracker is wrong within days

In your words: “Retainer hours get tracked in Asana time entries, then I re-enter a summary into the Master Tracker spreadsheet, then it goes into the invoice.” And: “I update it by hand and it’s usually a few days behind reality.”

What it costs today.

- You: 1.5 hrs/wk x $57.49 x 50 = **$4,312**
- Your account lead: 1.0 hrs/wk x $38.45 x 50 = **$1,923**
- **Total: $6,234 a year** maintaining a record you told us nobody trusts.

Recoverable at 80%: $4,987 a year. That returns 1.2 of your hours a week and 0.8 of your account lead’s.

Read findings 3 and 4 together. They are one fix and two different pools of money. The tracker drifting and the work that never gets billed have the same cause: there is no trustworthy record of who worked which hour for which client. Finding 3 counts the labor of maintaining the bad record. Finding 4 counts the revenue the bad record loses. They do not double count, and they are not two projects. The 30-day plan treats them as one.

Here is the bad record, in your own export. Hours sold, hours per the tracker, hours per the task tool:

Client	Sold	Tracker says	Task tool says	Tracker minus task tool
A	45	52	31	21
B	50	44	38	6
C	35	35	12	**23**
D	40	41	40	1
E	45	30	19	11
F	40	48	44	4
G	50	50	26	**24**
H	40	37	9	**28**

Three of those rows are worth a closer look. On client C the tracker says you delivered exactly the 35 hours you sold, to the hour, and the time entries account for 12. On client G, exactly 50 sold and exactly 50 used, with 26 logged. Two clients landing exactly on their number is not measurement, it is the month-end reconstruction you described. The row for client H was last updated on 30 July.

Verdict: product limit, and not the one you would guess. Your task tool’s Starter plan **does not have native time tracking**. Its pricing page carries a line reading “Time tracking with integrations” in the Starter column, which means you can connect a separate time tracking product to it. Actual logging of time against a task is on the Advanced plan and above; the vendor's own help page lists the plans that have it and Starter is not among them. Verified 2026-09-01.

So the "half filled in on a good month" time entries are not a discipline problem. They are people typing into a field that was never built for it.

The fix, and it costs nothing. The single cheapest path is a setting inside software you already pay for.

Your accounting plan already does this. Built-in time entry, with a Customer field, a Billable checkbox and a rate per hour, is included on your tier and on the tier below it, at no extra charge. It produces reports for time by customer and for unbilled time, and billable time flows straight onto the invoice. Intuit's own help articles, updated 2026-08-03 and 2026-08-05, read 2026-09-01.

1. Turn on time tracking in the accounting settings.
2. Add each retainer client with its monthly hours.
3. Three people log hours there weekly. Same keystroke your account lead already spends on the tracker, one step later in the chain instead of one step earlier.
4. Retire the Master Tracker. The hours column stops existing. Renewal dates can stay in a sheet.

The one thing to check before you start, because it is the only thing that could stop this: the vendor documents that the weekly timesheet does not work properly if you run their own payroll product alongside it. If you do, tell us and we will re-cost this in your two-week question window at no charge.

The three paths, priced, so you can see why the free one won.

Path	Cost	What it gets you
Use the accounting plan you already pay for	**$0**	Time by customer, billable flag, unbilled time report, straight onto the invoice
Add the task tool's timesheets extra, 3 seats billed annually	$17.97/mo, $215.64/yr	Timesheets in the tool your team already lives in
Upgrade the task tool to Advanced, 3 seats billed annually	$42.00/mo, $504.00/yr	Native time tracking plus the rest of that tier

The free path wins on cost and it also wins on the thing you actually want, because it puts the hours in the same system that produces the invoice. The other two still leave a gap between where time is logged and where it is billed, which is the gap this finding is about.

Finding 4. About 16 hours a month of delivered work is never invoiced

In your words: “Between ’client asked for something extra’ and ’that extra thing gets billed,’ it almost never gets billed unless I personally remember to add it.” And: “That wasn’t a decision, it’s just what happened.”

How much, worked out two ways that agree.

From your Master Tracker export. Add up only the clients who used more hours than they bought: Client A 7 over, Client D 1 over, Client F 8 over. **16 hours in that month.** Under-use on other clients is not subtracted, because hours you did not spend on one client are not billable to another.

From your own count. About 2 out-of-scope asks per client per month across 8 retainers is about 16 a month, mostly an extra revision round or a quick graphic, of which about one a quarter reaches an invoice. At roughly an hour each, that is 16 hours a month.

Two routes, one from a spreadsheet and one from memory, land on the same number. 16 hours a month, **192 hours a year**.

What it is worth.

- 192 hours a year delivered beyond the retainer
- **Six of your eight agreements carry an overage clause**, so the eligible pool is 192 x 0.75 = **144 hours**
- Captured at **20%** = 28.8 hours
- At your blended retainer rate of $145 an hour = **$4,176 a year**

Recoverable: $4,176 a year. No hours come back to you here. This finding bills for hours already worked.

Why 20% and not more. The cap for this kind of finding is 30%, which would be $6,264. **We did not claim it.** You personally approve every client communication and do not want anything sent without you. So every hour this makes visible still has to pass through the same decision the finding is about. A system that surfaces the hour does not guarantee you bill it. Being right about the rate and cautious about the volume is a better trade than being optimistic about both.

And why the rate is not discounted. Normally we would count recaptured revenue at your margin, because winning revenue back usually means doing the work again. **Not here. The work is already done.** The designer already ran the extra revision round, the contractor is already paid, the client already has the file. Billing for it adds cash and adds no cost, so it counts at your full rate.

Verdict: habit, with a contract problem sitting underneath it for two clients.

The part that is not a software finding at all. Six of your eight retainers are on the 2022 agreement with its “$150 per hour with prior client approval” clause. **The two oldest are on a letter that says the retainer covers “reasonable additional requests”, with no rate.** For those two clients, no amount of time tracking recovers a dollar. There is nothing to bill against. **The fix for them is a contract conversation at renewal, not a setting.**

That is why this finding counts six eighths of the pool and not all of it.

One number you can improve on, and we cannot. You told us one of those two legacy clients is also one of the chronic late payers, which does not tell us which two of the eight they are. Of the 16 overage hours in your export, 7 sit on Client A, 8 on Client F and 1 on Client D. **If the two legacy agreements turn out to be A and F, this finding is worth a few hundred dollars, not $4,176, and the real answer is a contract conversation with two clients.** You can settle it in a minute and we would rather you knew that than found out later.

The fix, for the six clients where there is something to bill. It is finding 3's fix, and it needs nothing added.

1. Hours go into the accounting system with the Billable box ticked and the client selected.
2. On the 25th, run the unbilled time report. Five minutes.
3. Anything over the retainer, you decide: bill it, or waive it deliberately. Waiving is fine. It is waiving without knowing that costs money.

What this does not do, on purpose. It does not send anything to a client, it does not add a line to an invoice by itself, and it does not decide what to charge for. It puts a list in front of you once a month.

Finding 5. Every proposal is rebuilt from an old document while the proposal tool you pay for goes unused

In your words: "a proposal software subscription ($49/month) that I keep paying for but don't actually use because I still write proposals from an old Google Doc", "usually staying up late to do it".

What it costs today.

- You: 3.5 hrs/wk x 50 = 175 hours a year on proposals
- **Two thirds of that is assembling, not deciding.** Your template is 9 pages: cover, about the agency, the client's situation, scope, timeline, investment, team bios, three case studies from a bank of six, terms. Your own words: "roughly two thirds of the pages are the same every time." And your own time split says about an hour and a half of a 4 to 6 hour proposal is the thinking.
- Assembling: 116.7 hours a year of yours, 16.7 of your team's

Recoverable at 50%: $3,571 a year. That returns 1.17 of your hours a week.

Why 50% and not 80%. Most of a proposal is scoping and pricing judgment. That is the work and it does not template away. Claiming 80% here would be claiming we can automate your thinking, which is wrong and is the exact thing you told us not to touch. We are counting the third rewrite of the same capabilities paragraph, not the decision about what to sell.

One note on your own numbers. Your weekly figure of 3.5 hours implies about 3.2 hours per proposal, which is below the 4 to 6 you gave per proposal. **We used the weekly figure because it is lower.** Your per-proposal figures would have put this finding $1,000 to $3,000 a year higher.

Verdict: habit, sitting on a migration nobody did.

What you already own and are not using. Proposify, Team plan, $49 a month, one seat. Verified against the vendor's live pricing page on 2026-09-01, and your $49 matches their current published rate exactly. All three features this fix needs are on it:

- **Templates.** "All accounts allow unlimited templates."
- **A content library.** "Create and reuse sections, text snippets, and images that can be pulled into documents. Useful for pulling in case studies, team bios, and other bits of modular content." That sentence is your six case studies and your team bios, described by the vendor.
- **Electronic signature.** "All plans allow you to get documents legally e-signed." Today your clients reply "approved" by email. A signature is better evidence and it is included.

The fix. One evening, once.

1. Load the 9-page document as a template.
2. Break the never-changing pages into library blocks: about the agency, team bios, terms, and each of the six case studies as its own block.
3. Leave the four pages that get rewritten every time as blank sections. Those are yours to write.
4. Turn on the signature block instead of waiting for an email.

Next proposal: pick three case studies, write the four pages that are actually about this client, send. The two thirds you retype stops being typed.

One correction to what you may believe about your billing. The Team plan is billed quarterly or annually, not monthly. There is no month-to-month option on it. Your $49 a month is really $147 a quarter, committed a quarter at a time. That does not change what you spend; it changes when you can change it.

Finding 6. $148 a month buys two tools that do two of the jobs above, and neither is switched on

In your words: the paid-and-barely-used answer, and then your condition: "anything new has to replace the AgencyAnalytics or Proposify money, not sit on top of it. If the fix is to actually use those two, that's the answer I was hoping for."

It is the answer.

Counted at $0, and here is why that is not a technicality. $99 plus $49 is $148 a month, $1,776 a year, and it would be easy to put that in the total as found money. It is not found money. Finding 1's fix is to use the first tool. Finding 5's fix is to use the second. **If you use them, the $148 is not saved. If you cancel them, findings 1 and 5 need a different fix or stay broken.** The two paths are mutually exclusive and only one of them can be in a total. Counting both would be counting the same $1,776 twice.

So it is not a saving. It is the funding line, and it is the reason this whole report costs nothing to act on. Your condition was that nothing net-new sits on top of the $148. Nothing in this report is net-new at all. The one place that could have needed money, finding 3, turned out to be a setting in software you already have.

Verdict: configuration, twice.

One thing we found that you can have for free, if you want it. The three features finding 5 needs, templates, the content library and the signature, are all on the proposal tool's cheaper plan, at $19 per seat per month billed annually or $29 billed monthly, against the $49 you pay. That plan allows 10 document sends a month and you send 4 to 6. If those three features are your reason for being on the more expensive plan, you are one tier too high, and moving down at renewal is **$20 to $30 a month, so $240 to $360 a year.**

We are not counting it, for the same reason as above, and we are not pushing it. Use the tool first for a quarter. If you end up wanting the pricing catalog or the integrations that the higher tier adds, stay. If you do not, move down at renewal and keep the difference.

4. What we deliberately did not pursue

Everything we looked at and left, so you can see it was decided rather than missed.

- **Anything that sends a client email without you, and anything touching creative direction.** Your standing rule, and it is a good one. It bound findings 2, 4 and 5, and it is why finding 2 is designed the way it is rather than the easy way.
- **Your CRM, and prospect automation.** You declined access because the prospects in it do not know they are being discussed. We do not model what we have not been allowed to see, and no finding here depends on it.
- **Replacing your accounting system.** Nothing in your intake asks for it, and the migration would cost more than every finding in this report combined.
- **Replacing your task tool.** Same, and the retyping problem follows you to any tool if the time record stays optional. That is why finding 3 moves the record rather than the tool.
- **Your design software.** Used well, by your own account, and no finding would clear our bar.
- **Your assistant for content drafts.** Already working and already saving you real time. An audit that recommends what you already do is padding.
- **Re-entering project status into client recaps** (process 9). Real, and it is a communication task rather than a data task. Automating the recap means writing to a client on your behalf, which is the line you drew.
- **Your bookkeeper's five hours a week** (process 8). Bookkeeping is the work, not overhead, and freeing half an hour of her invoice chasing does not change what you pay her. Her half hour is counted at nothing in finding 2, which lowers that finding by about $600.
- **Renegotiating or firing the two chronic late payers.** We answered whether the lateness is theirs or yours, which is what you paid for. Which clients to keep is your call and we are not going to make it from a spreadsheet.
- **Your contractor bench and how work is assigned to it.** No signal in your intake and nothing to size it with. If you want it looked at, it is a separate conversation.
- **Migrating your reporting tool to its new plan.** We checked, and it would cost you more. Named here so you know it was considered.
- **Anything net-new that does not come out of the $148.** Your condition, and in the end nothing in this report needed money at all.

5. What this is worth, and the bar we hold ourselves to

Total identified opportunity: 9.3 hours a week and $27,470 a year.

Finding	Recoverable per year	Confidence
1. Manual client reporting	$7,837	High
2. Chasing overdue invoices, labor	$6,899	High
3. Retainer hours retyped	$4,987	High
4. Delivered work never invoiced	$4,176	Medium
5. Proposals rebuilt from scratch	$3,571	High finding, Medium hours
6. Paid and unused tools	$0, the funding line	High
Total	**$27,470**	

New tool spend: $0 a year. Net: $27,470 a year.

Net equals identified because nothing here spends money. That is not a rounding; it is the shape of this business's problem. The three largest findings are all switching on capability you already pay for.

Even counting only what we're certain of: $19,723/yr. That is findings 1, 2 and 3, the high-confidence ones. It excludes finding 4, where the volume is solid but the capture is a judgment, and it excludes finding 5, where the finding is certain and the hours are your estimate.

The hours, in your units. 6.8 of yours a week and 2.6 of your team's. Your hours figures are estimates, by your own label, so at plus or minus 20% the honest range on yours is **5.4 to 8.1**. You asked for ten. **We found five to eight, and we are not rounding it up.**

The cash release, which is not in any number above. Moving the Client A retainer invoice to the last working day of the month it covers releases **$2,416 once**, and up to **$15,189 once** if your other six retainers run the same rhythm. That is cash arriving earlier, not new cash, and it happens one time. It is reported separately because mixing a one-time balance-sheet gain into an annual figure would inflate this report by more than its largest genuine finding.

The bar we hold ourselves to. We do not send an audit that finds less than $4,500 a year against a $1,500 fee. This one finds $27,470, and $19,723 counting only the high-confidence findings. That is a standard for our own work, checked before this document reached you.

6. The first 30 days, in order

Free and fast first. Nothing in this plan costs money.

Every step below costs $0, so there is no cost column: there would be nothing in it. The time column is your time, which is the only thing any of this spends.

Week	Do	Why this week	Who	Time	Return, annualized
1	Read your reporting tool's billing page and confirm the client allowance covers six	Everything in week 2 assumes there is room, and this takes ten seconds	You	5 min	gates $7,837
1	Write your three reminder texts. Do not switch anything on	The words are the part you care about, and writing them is not the same as sending them	You	45 min	part of $6,899
1	Send those three texts by hand from the invoice list, as invoices come due	You watch your own words land on real clients before anything runs on its own	You	none, it is inside the 3 hrs a week you already spend	part of $6,899
1	Move the retainer invoice run to the last working day of the month	The single change with the largest cash effect, and it is a calendar entry	You	15 min	$2,416 to $15,189, once
2	Have your coordinator build the two client dashboards, copying one of your four working ones	Biggest finding, no dependencies, and you have done it four times already	You	3 hrs	$7,837
2	Have them add your commentary text box and creative image widget, set the schedule and branding	Finishes the job. A dashboard nobody receives is not a report	You	1 hr	included above
2	Confirm you do not run your accounting vendor's own payroll product	It is the one thing that would block week 3, and it is a two-minute check	You	10 min	gates $4,987
3	Switch the reminders to automatic, with your texts and the 3-day, 3-day, 10-day schedule	Two weeks of watching is enough, and this is the "yet" in your own sentence	You	15 min	$6,899
3	Turn on time tracking in your accounting system, add the eight retainers with their hours	The one fix behind findings 3 and 4. Do it once, not twice	You	1 hr	$4,987 plus $4,176

Week	Do	Why this week	Who	Time	Return, annualized
3	Three people start logging hours there. Freeze the Master Tracker's hours column	Both records at once is worse than either. Pick one and stop feeding the other	All three of you	10 min a week each	included above
4	Load your proposal template and break the never-changing pages into reusable blocks	Needs an uninterrupted evening, which is why it is last, not because it is least	You	2 hrs	$3,571
4	Run the unbilled time report. Decide each line: bill it or waive it on purpose	First month of the record existing, and the first month you can see what you gave away	You	5 min	part of $4,176
4	Ask your two oldest clients whether their letter can move to the current agreement	Their overage is worth nothing until it does, and renewal is the natural moment	You	one call each	unlocks the rest of $4,176

Total cost: $0. Total return: $27,470 a year, plus $2,416 to $15,189 of cash, once.

If you only do three things.

1. **Build the two dashboards.** Week 2, three hours of your coordinator's time, $7,837 a year. The highest return per hour of effort in this report by a distance.
2. **Move the retainer invoice run to the last working day of the month.** Week 1, fifteen minutes, and it is the only line here that puts cash in the bank rather than time on your calendar.
3. **Turn on time tracking in your accounting system.** Week 3, one hour, and it is the single fix behind two findings worth $9,163 a year between them.

One sequencing note. Week 3's reminders depend on week 1's texts existing and on two weeks of you sending them by hand. Do not skip week 1 and switch it on directly. The two weeks are not caution for its own sake; they are how you find out that the wording you wrote reads the way you meant before a client reads it.

And one thing not to do. Do not run the Master Tracker and the new time record side by side "for a while to be safe". Two records that disagree is exactly the problem you are paying to fix, and the month you spend keeping both is the month nobody trusts either.

7. Appendix: our assumptions

Every judgment sitting on top of the numbers, so that disagreeing with one rescales the rest instead of discrediting the report.

The rates

Role	Loaded $/hr used	How it was derived
You	**$57.49**	Boise City metro area median hourly wage for General and Operations Managers, $40.23, times a benefits load factor of 1.429
Senior designer and account lead	**$38.45**	Boise City metro area median for Graphic Designers, $26.91, times 1.429
Social and content coordinator	**$26.10**	**Your figure.** $46,000 divided by 2,080 hours, times the 18% burden you gave
Part-time bookkeeper	**$0**	Excluded from every finding

Sources. Wages: US Bureau of Labor Statistics, Occupational Employment and Wage Statistics, May 2025 estimates for the Boise City, ID metropolitan area, released 2026-05-15 as USDL-26-0725. Benefits load: US Bureau of Labor Statistics, Employer Costs for Employee Compensation, March 2026, released 2026-06-12 as USDL-26-0827: private industry total compensation $46.60 per hour worked against wages and salaries of $32.60, so 46.60 divided by 32.60 is 1.429. Both read 2026-09-01.

Where your figures and the published ones disagreed, the lower one was used. Your own numbers would have put you at $62.40 an hour and your senior designer at $38.58. The published Boise figures were lower in both cases, so those were used. For your coordinator the published figure was $42.86 and yours was $26.10, so yours was used. That one choice took about $1,300 a year out of finding 1.

Two rates we rejected, so the choice is visible. Art Directors in Boise gives $58.45, within a dollar of the rate used, which is a useful check. Marketing Managers gives $109.91 and was not used: Boise’s 780 marketing managers sit mostly in large corporate employers, and applying that to the owner of a six-person shop would nearly double the largest input in this report.

One vintage note. The wage data is May 2025 and the benefits factor is March 2026. There is no more recent Boise wage release and no Boise-specific benefits factor. Wages have risen since May 2025, so these rates are slightly conservative.

Working week and volumes

- **50 working weeks a year**, not 52. Two weeks off.
- **2,080 hours a year** for converting a salary to an hourly rate.

- **Every hours figure in this report is your estimate**, given in your own follow-up answers and labeled by you as estimates. Your intake form carried no hours at all. This is the largest single uncertainty in the report: five of six findings have an hours multiplier and all of them are yours. Correct any of them and we recompute free inside your two-week window.
- **Volumes taken from your own documents rather than estimated**: the 16 hours a month of overage, from your Master Tracker export. The twelve invoice dates. The aging summary. Those are the strongest numbers here.
- **Two intake fields were not used at all.** You answered 18 to “jobs or orders per week” and $6,500 to “average job or order value”. Multiplied out that is about $6M a year against your stated $500K to $1M. You told us 18 is deliverables shipped and $6,500 is a monthly retainer, which resolves it. Neither number appears as a multiplier in any finding. Our form asked an agency a question written for a trades business, and that is our problem to fix, not yours.

Method

Findings came from your intake and your follow-up answers, sized in a worksheet where every number shows its arithmetic, then written up. Every capability claim about a product was checked against that vendor’s live documentation on **2026-09-01** and is dated in the finding. Nothing here rests on what a tool used to do.

Three claims are worth naming as the ones we checked hardest, because a report is only as good as the thing it would have been wrong about:

1. **Every one of the seven advertising and analytics channels your two clients run is a supported connector.** Checked one at a time. Had one failed, finding 1 would have changed shape.
2. **Your accounting system cannot hold an invoice reminder for your approval before sending, on any plan.** The desktop product has that feature; the online product does not. This is why finding 2 is designed as approve-once rather than review-then-send.
3. **Your task tool’s Starter plan has no native time tracking**, despite a line on its own pricing page that reads as though it does. Confirmed on the vendor’s help documentation.

What we could not verify, listed rather than buried. Your $99 a month does not match any plan your reporting vendor publishes now or published before; your figure was used and the action is to read your billing page. We did not check whether that vendor has an accounting connector that could automate your spend reconciliation. We do not know whether you run your accounting vendor’s payroll product, which is the one thing that could block finding 3’s fix. And we do not know which two of your eight clients are on the legacy letter.

How this audit was produced

Day	What happened
0	Intake received and parsed. Gaps identified
1	Findings plan built and reviewed, with the arithmetic sketched for each candidate

Day	What happened
1	Follow-up questions sent: the ones that change a number, and nothing else
2	Your answers and your three documents received
2 to 3	Product and wage research, every claim against a live source, dated
3	Numbers worksheet: every figure with its arithmetic in one place
4 to 5	Report drafted
6	Quality gates: name and identity scan, language checks, arithmetic re-derived from the worksheet, both internal value bars
7	Final review, rendered and delivered

Data handling

This is a sample audit about a fictional business, so there is nothing of anyone’s to delete. On a real order: we would have been given read-only access to your accounting system and your task tool, that access is revoked on delivery day, and everything you shared is deleted within 30 days with a written confirmation. Your submitted answers never enter our source control at any point.

How to get help

Your questions are answered free for two weeks: reply to the email this report arrived with. We will check in on day 10. And a live 30-minute call to walk the findings together is included with your audit; the booking link is in that same email.

Bonus A: Getting named when a customer asks an AI assistant

A dated, honest read on whether AI assistants name your agency when someone asks for one.

What this section is, and what it is not. When someone asks an assistant “who are the good branding agencies in Boise”, the answer is assembled from what those systems can find about you on the open web. This section is a checklist of what makes you findable, and the fixes for each gap. It is descriptive, it is dated, and **no dollar figure is attached to it**. It is not in the $27,470 and it is not in the bar in Section 5, because we have no honest evidence for what an AI-sourced inquiry is worth to a marketing agency and we are not going to invent one.

Nobody can guarantee placement in an AI answer, including us. Anyone who tells you otherwise is selling something. These systems are probabilistic: the same question asked twice can give different answers, and they change without notice. What can be done is unglamorous and durable: make the facts about you easy to find, consistent everywhere, and machine readable. Those are fundamentals, not a trick, and they help ordinary search too.

For this sample, the honest result is nothing. The subject of this report is invented. No assistant can name a business that does not exist, so there is no snapshot to show you and we are not going to fabricate one. On a real order this section carries the checklist below filled in against your actual web presence.

What we check

Check	What it means	Why it matters
Crawler access	Whether your `robots.txt` allows the AI crawlers, by name	A blocked crawler cannot cite you. This is the most common own goal we see
Structured data	Whether your pages carry machine-readable Organization and LocalBusiness markup	It is how a machine knows your name, city and services are facts rather than decoration
Answer-first structure	Whether your pages answer a question in the first paragraph	Assistants quote paragraphs, not brochures
Name, address, phone consistency	Whether those three agree everywhere they appear	One stale address on one directory is enough to make a system uncertain about all of them
Linked profiles	Whether your site points at your own profiles elsewhere	It is how the systems connect the entries into one entity
Freshness	Whether anything on the site was updated this year	Staleness reads as closed

Check	What it means	Why it matters
Business profile	Whether your listing is complete, categorized and has recent posts	Still the single biggest local input
Directory listings beyond the biggest one	Whether you exist in more than one place	One source is a rumor
Review breadth	Whether reviews exist somewhere other than one platform	Same reason
Analytics baseline	Whether you can see referrals from assistants at all	You cannot manage what you cannot see

What to do about a gap

Every gap gets a fix with three ways to do it: yourself, hire anyone, or hire us at a fixed price. None of these are dollarized, for the reason above.

For an agency specifically, two of these are worth more than the rest. **Your structured data**, because your service list and your city are the two facts an assistant needs to include you in a local answer. And **answer-first structure on your service pages**, because you sell to people who ask questions in sentences.

Method notes. The list of assistants worth checking, the crawler names, and which model sits behind which product all change on a scale of months. Re-run this quarterly. It is a snapshot with a date on it, not a permanent score.

Bonus B: A starter AI policy

A courtesy section, because the most common thing that stops a small team using these tools is not knowing what is safe to put in them. This is a starting point, written around your actual tools. **It is not legal advice.** Have a lawyer look at it before it becomes policy, especially the client-data section, since your client contracts may have their own confidentiality terms.

1. Approved tools

Tool	Approved for	Not approved for
Your assistant for content drafts	First drafts of captions, blog outlines, ad copy variations, headline options, rewriting your own text	Anything containing a client's unpublished results, spend figures, contract terms, or an unannounced campaign
Design software's built-in generative features	Concepting, mockups, background work on internal material	Final client deliverables without a human check, and anything trained on a client's proprietary brand assets without their written say-so
Accounting, task tool and reporting tool AI features	Summarizing your own internal data inside those tools	Exporting client data to a different AI tool to do the same job

Adding a tool. One person approves it, which is you. The question to ask is where the data goes and whether it is used to improve someone else's model. If the answer is not on the vendor's page in plain words, that is an answer.

2. What can and cannot go into an AI tool

Safe: your own published work, public information about a client's market, your own internal notes, anything already on a public website, invented example data.

Never: client login details of any kind. Unpublished campaign plans or launch dates. A client's revenue, spend or margin figures. Contract terms and rates, including your own. Personal data about a client's customers. Anything a client has marked confidential. Your own payroll figures.

The test, when it is not obvious: would you be comfortable if this text appeared in a competitor's answer to a similar question next month? If not, it does not go in.

3. Client data

Ask first, and ask in writing. Some clients will be delighted and some have contracts that forbid it. A one-line email at the start of an engagement settles it for the whole relationship.

Default when you have not asked: no client data goes into a general purpose AI tool. Strip names, figures and identifying details before using a tool to help with the writing.

4. Acceptable uses

Drafting and rewriting your own words. Summarizing long documents you already have the right to read. Generating options to react to. Checking your own copy for clarity. Explaining something you do not understand yet. Producing first-pass structure for a proposal, a brief or a report, on the understanding that the thinking is still yours.

5. Prohibited uses

Sending anything to a client that a person has not read end to end. Presenting generated work as original research. Using it to make a decision about a person, including hiring. Putting anything from the "never" list above into any tool. Using generated imagery of real people without saying so. Relying on a factual claim from an assistant without checking it against a real source, which is the same rule this report holds itself to.

6. When something goes wrong

If confidential information goes into a tool by accident: **tell one person immediately, which is you.** No blame. The first hour matters more than the explanation. Then, in order: check whether the tool has a delete-conversation and an opt-out-of-training setting and use both. Write down what went in and when.

Decide whether the client needs to be told, and lean towards telling them. Note what made it easy to do by accident and change that.

A near miss is worth reporting too, and it is the cheapest information you will get about where this policy is unclear.

7. Review

Every six months, and whenever you add a tool. Fifteen minutes: are the approved tools still the tools we use, has any vendor changed its data terms, did anything go wrong, does the never list need another line. Put the date of the last review at the top of the document so it is obvious when it has been forgotten.