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AI CLARITY AUDIT™ REPORT

LL BUSINESS COLLECTIVE

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1. Executive Summary

THE TAKEAWAY

Five AI workflows can give LL-BC back 33-74 team hours a month, mostly with tools it already pays for. People stay in charge of everything clients see.

Potential Hours Saved and Cost

33-74

team hours back each month

2-5 hrs

a week back for Leanne

~\$120

a month in new tools, at most

None

new time logging for the team

Overview: What We Found

- 1 Leanne is the scheduling bottleneck**
Calendar and email are her biggest time drain and her first ask.
- 2 One person enters most tasks**
Requests from meetings and email get buried unless Stephanie catches them.
- 3 Client knowledge and files are scattered**
Client details live in two heads, and finished files sit in inboxes instead of Drive.
- 4 Content takes most of Stephanie's time**
AI graphics look generic, so drafts get sent back and forth.

Value At A Glance: Top 5 Opportunities

1	Owner calendar and inbox assistant No more scheduling ping-pong; faster replies	9-21 hrs / month 	HIGHEST
2	Meeting and email task capture Every request becomes a task with an owner and date	8-16 hrs / month 	HIGHEST
3	Client reference guides Shared client memory; faster onboarding	4-8 hrs / month 	HIGH
4	Content engine with proof check Faster content that still sounds human; errors caught first	8-18 hrs / month 	HIGH
5	Client file capture in Google Drive Every current file in one predictable Drive folder	4-11 hrs / month 	HIGH
Total potential hours saved About 8-17 hours a week across the team		33-74 hrs / month	

ISW planning estimates based on the discovery call. Phase 1 baseline counts will confirm them against real results. Light bar = low end, dark bar = upside.

2. AI Opportunity

THE TAKEAWAY

Numbered in the order to build them. The first two do the most for Leanne and Stephanie: no more scheduling ping-pong and no more lost requests.

1

Owner calendar and inbox assistant

Today: Scheduling bounces between Leanne and the team, and email eats her day.

HIGHEST PRIORITY

9-21

hours saved
per month

15-25 scheduling threads a week at 10-15 min each, cut by two-thirds, plus 3-5 hours a week of email, cut by about 15%.

GOAL

Take scheduling and routine email off Leanne's plate.

WHAT AI DOES

Gemini in Gmail summarizes threads, drafts replies, and suggests open times. HubSpot meeting links with focus blocks let the team book Leanne without asking her.

HUMAN REVIEW

Leanne approves anything sent in her name. Nothing sends on its own.

EXPECTED OUTCOME

Faster replies, no more ping-pong, and real focus time back.

AUTOMATION FLOW

Request arrives → Gemini drafts reply + link → ✓ Leanne approves → Booked in calendar + HubSpot

2

Meeting and email task capture

Today: Requests get buried in email unless someone, usually Stephanie, enters them by hand.

HIGHEST PRIORITY

8-16

hours saved
per month

10-15 client meetings a week at 8-10 min less cleanup each, plus 10-15 request emails a week at 3-5 min each.

GOAL

Every client request becomes a HubSpot task with an owner and a date, the same day.

WHAT AI DOES

HubSpot Meeting Notetaker turns client calls into summaries and action items. Emails labeled "To HubSpot" become draft tasks automatically.

HUMAN REVIEW

The meeting lead confirms owners and dates before tasks go live.

EXPECTED OUTCOME

No more missed requests or deadline scrambles.

AUTOMATION FLOW

Meeting or email → AI pulls action items → ✓ Lead confirms → Task in HubSpot queue

3

Client reference guides

Today: Each client's history lives in Leanne's and Stephanie's heads.

HIGH PRIORITY

4-8

hours saved
per month

2-3.5 hours a week of "quick questions" and re-explaining, cut by about half.

GOAL

Anyone on the team can walk into a client meeting prepared.

WHAT AI DOES

Builds a two-page guide per client from the agreement, notes, emails, and a short voice interview with Leanne. Preps meeting briefs and suggests monthly updates.

HUMAN REVIEW

Leanne or Stephanie approves every guide and every change.

EXPECTED OUTCOME

Fewer interruptions, faster onboarding, no event-name mix-ups.

AUTOMATION FLOW

Files + Leanne interview → AI drafts guide → ✓ Leanne verifies → Linked in HubSpot + Drive

2. AI Opportunity

4

Content engine with proof check

Today: Content takes the most of Stephanie's time, AI graphics look generic, and one missed proof can put a wrong date in public.

HIGH PRIORITY

8-18

hours saved
per month

40-60 posts a month at
8-12 min saved each, plus
60-90 pieces a month at
3-4 min less proofing.

GOAL

Faster monthly content that still looks and sounds like each client, with zero public errors.

WHAT AI DOES

Drafts the monthly calendar and captions in each client's voice, fills human-designed Canva templates in bulk, then checks every piece for dates, names, and brand rules.

HUMAN REVIEW

Stephanie, or a named backup, edits every caption and design. Print and campaigns get a second read.

EXPECTED OUTCOME

Faster batches, on-brand designs, and mistakes caught before clients see them.

AUTOMATION FLOW

Monthly plan



AI drafts captions



Canva fills templates



AI proof check



✓ Stephanie approves

5

Client file capture in Google Drive

Today: Finished files sit in inboxes and HubSpot tasks instead of Drive, and the team has had to ask clients to resend files LL-BC made.

HIGH PRIORITY

4-11

hours saved
per month

4-6 people spending 10-20
min a week digging through
email for files, plus 40-80
files a month saved and
renamed by hand at about 2
min each.

GOAL

Every client's current files live in one predictable Drive folder that anyone can find in seconds.

WHAT AI DOES

Catches attachments sent to and from clients, gives each one a standard name, and files it in the right client folder with a link in HubSpot. A weekly check flags duplicates and old versions, and anyone can ask Gemini in Drive for "the latest brochure" and get the link.

HUMAN REVIEW

The project owner confirms any file the AI can't match to a client. Nothing gets deleted, only moved or flagged.

EXPECTED OUTCOME

No more digging through email, no more asking clients to resend files, and one current version of everything.

AUTOMATION FLOW

Client attachment



AI names and sorts



✓ Owner OKs unsure ones



Saved to client folder

Where people stay in charge

- 1 Leanne approves anything sent in her name.
- 2 The meeting lead confirms every task owner and due date.
- 3 Leanne or Stephanie approves every client guide and every change.
- 4 Stephanie, or a named backup, approves every caption and design.
- 5 The project owner confirms any file the AI can't match to a client. Nothing gets deleted.

AI drafts. People decide. Nothing goes to a client or the public without a person's OK.

3. Tool Recommendations

THE TAKEAWAY

Most of this runs on tools LL-BC already has. New spend is about \$120 a month at most, and lower once current Canva costs come off.

Tool & category	What it does for LL-BC	Used in	Difficulty	Estimated monthly cost
HubSpot Sales Hub Professional CRM, PROJECTS & AUTOMATION	Projects, tasks, meeting links, Meeting Notetaker, and file links on each client record. Already in place.	1 2 3 5	Medium	\$0 new for current seats. List \$90/seat/mo annual.
Google Workspace Business Standard with Gemini EMAIL, CALENDAR & AI	Gemini drafts replies, summarizes threads, and suggests meeting times. Drive holds every client file, and Gemini in Drive finds the latest version.	1 2 3 5	Low	\$14/user/mo annual. About \$7 more per user if on Starter.
ChatGPT Business or Claude Team (pick one) AI WORKSPACE	A private project per client for guides, captions, and proof checks. Both connect to HubSpot and Drive.	3 4	Low	\$20/user/mo annual or \$25 monthly. Start with 3 seats.
Canva Business DESIGN	A brand kit and locked templates per client. Bulk Create fills a month of posts at once. Pro stops at 5 brand kits.	4	Low-Med	\$250/user/yr (about \$21/mo). 2 seats.
Zapier Professional AUTOMATION	Turns labeled emails into HubSpot tasks and files every client attachment into the right Drive folder.	2 5	Medium	\$19.99/mo annual.

Estimated new spend

~\$120 / month

3 AI workspace seats, 2 Canva Business seats, and Zapier. The real increase is lower, since LL-BC already pays for Canva. Add any Workspace upgrade on top.

Retire, keep, and hold

Retire: Calendly. HubSpot meeting links replace it.

Keep: QuickBooks and its HubSpot sync, Hyfin, Susser Bank, DashThis, and Acrobat.

Hold: Fyxr AI (\$37/mo annual), only if Gemini doesn't cut Leanne's inbox time enough.

"Used in" refers to the AI Opportunity numbers. Prices are published list prices as of October 2026 and can change.

4. Recommended **Roadmap** & **ROI**

THE TAKEAWAY

Build the HubSpot foundation first, then add one opportunity at a time. Move on only when the current phase is working.

- 1 Set the foundation in HubSpot**
 Confirm Pro seats, the Workspace edition, and the right HubSpot account. Build the project pipeline, task standard, and Drive folders. Count today's baseline.

MOVE ON WHEN
 All active work lives in HubSpot and baseline counts exist.
- 2 Free Leanne's calendar and inbox** BUILDS OPPORTUNITY 1
 Create HubSpot meeting links with focus blocks, write one scheduling rule set, retire Calendly, and start the daily Gemini habits.

MOVE ON WHEN
 Most meetings book by link and scheduling threads drop by at least half.
- 3 Capture every task** BUILDS OPPORTUNITY 2
 Turn on Notetaker with a consent line, load the summary template, and add the "To HubSpot" email label and Monday cleanup.

MOVE ON WHEN
 90% of client meetings have confirmed tasks the same day.
- 4 Build the client reference guides** BUILDS OPPORTUNITY 3
 Interview Leanne on each client, draft all six guides with AI, verify them, and link them in HubSpot and each client's AI project.

MOVE ON WHEN
 Anyone can prep for a client meeting without asking Leanne.
- 5 Launch the content engine** BUILDS OPPORTUNITY 4
 Build locked Canva templates per client, run the monthly content prompts and Bulk Create, and proof-check every piece.

MOVE ON WHEN
 Time per post is down and zero date or name errors reach a client.
- 6 Capture every client file, then trim** BUILDS OPPORTUNITY 5
 Build the client lookup sheet and the auto-filing Zap, clear the To Sort folder daily, and run the weekly folder check. Review each quarter and retire anything that isn't saving time.

MOVE ON WHEN
 Nobody digs through email for a current file, and every tool earns its cost.

ROI Measurement Plan

Measure	Target	Evidence (no time logging)
Scheduling load	Two-thirds fewer scheduling threads; 80% of meetings booked by link	Gmail label count + HubSpot meetings report
Leanne's inbox time	15% less in a one-week spot check	Before and after spot check, no ongoing logs
Task capture	90% of client meetings have tasks the same day; zero missed requests	HubSpot task report
Client knowledge	50% fewer "quick questions" about client basics	Monthly two-minute team pulse
Content speed and quality	30-40% less time per post; zero date or name errors	10-post sample + proof log
File findability	Zero files requested back from clients; any current file found in under a minute	Weekly folder check + monthly team pulse

5. Risks, Constraints & Dependencies

THE TAKEAWAY

The biggest risks are habits and consent, not technology. Each one has a simple fix.

Item	Why it matters	How LL-BC handles it
HubSpot seats DEPENDENCY	Meeting Notetaker needs an assigned Sales Hub Professional seat for each person who uses it.	Confirm who holds Pro seats in Phase 1. Add seats only for people who run client meetings.
Two HubSpot accounts DEPENDENCY	LL-BC runs two HubSpot accounts, one for each business.	Confirm which one is Professional and keep each business's data separate.
Google Workspace edition DEPENDENCY	Gmail's "Help me schedule" and Gemini in Meet and Docs need Business Standard or higher.	Check the edition and upgrade only the people who need it.
Task habits RISK	HubSpot only stays useful if finished tasks get closed.	Notetaker drafts the tasks, tasks close from the mobile app, and a 10-minute Monday cleanup catches the rest.
Recording consent RISK	Clients must know when a call is recorded.	A consent line in every invite. Skip recording when a client declines.
Generic-looking content RISK	AI-made graphics tend to look the same.	People design each client's templates. AI drafts copy and fills them only.
Client data and contractor access RISK	Client data could end up in personal AI accounts, and an all-contractor team needs clean access control.	Company accounts and shared folders only, a one-page AI use policy, and same-day access removal.
AI accuracy RISK	AI can get dates, names, facts, and file matches wrong.	A person reviews everything that leaves LL-BC, and unsure file matches go to a person. The proof check is a second net.
Time tracking and review load CONSTRAINT	The team doesn't log hours, and savings vanish if every approval routes to Leanne.	Measures use counts HubSpot and Gmail already collect. Each workflow has a named reviewer.

A quick note on the nature of AI...

The tools, platforms, and capabilities available today may look very different six months from now. That is the nature of one of the fastest-moving industries in history. Every AI Clarity Audit™ is built around the best available information at the time of delivery, and all tool recommendations, pricing references, and platform capabilities are based on available data as of October 2026.

ISW Consulting is not responsible for changes that occur after delivery, including shifts in tool pricing, availability, or functionality. We recommend revisiting your audit periodically and encourage you to reach out if you have questions about how the evolving AI landscape may impact your recommendations.