

CARTER SIMMONS AI CONSULTING · TAMPA, FL

FREE FIELD GUIDE — 2026 EDITION

# The 7 Systems Costing You 20+ Hours a Week



The exact framework I use to find the highest-ROI places to deploy AI inside a local business or founder-led company — before I write a single line of automation code.

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HOW TO USE THIS CHECKLIST

# Read it like an operator. Score yourself out of 7.

Every local, founder-led business runs on the same seven systems — whether they've named them or not. Most have 2–3 running well, 2–3 running on duct tape, and 1–2 nobody owns. That last category is where AI pays off fastest, because you're not replacing a working process — you're creating one for the first time.

- 1 Answer the audit questions honestly. One sentence each.
- 2 Check for the red flags. If you see two or more in any system, that's where you start.
- 3 Note the AI opportunity and the ROI ballpark. Rank them. Build in order.

*Most clients find that two systems deserve immediate AI investment, and the rest can wait. Better to ship one working pilot in 30 days than to plan five systems for a year.*

YOUR SCORECARD

SYSTEM	OWNED?	RED FLAGS	PRIORITY
01 Lead capture	■	—	—
02 Sales follow-up	■	—	—
03 Cold outbound	■	—	—
04 Inbound support	■	—	—
05 Internal ops & admin	■	—	—
06 Knowledge & SOPs	■	—	—
07 Reporting & dashboards	■	—	—

SYSTEM 01 — OF 07

# Lead Capture & Qualification

01

*How a stranger goes from “never heard of you” to “qualified prospect with contact info in your CRM.”*

## AUDIT QUESTIONS

- ? Where does every new lead enter your business — form, call, referral, ad, walk-in?
- ? Who (or what) decides if a lead is qualified before it reaches a salesperson?
- ? How long between lead entry and first human response? Be honest.
- ? What % of inbound leads never get followed up on at all?

## RED FLAGS — 2+ = PRIORITY

- × Leads sit unread for more than 1 business day.
- × Sales spends time qualifying leads that should have been filtered.
- × You can't tell which channel produced your last 10 customers.
- × Manual data entry copies the same lead into 2+ tools.

### AI OPPORTUNITY

AI form router + qualification agent: every inbound lead is auto-scored against your ideal-customer profile, routed to the right rep or auto-replied to with a calendar link, and pushed to the CRM with enrichment data (company size, stack, role) attached.

### ROI BALLPARK

*5–15 hrs/week of sales-rep time recovered + 20–40% lift in qualified-meeting volume. Pays for itself inside the first month for most \$500k+ ARR businesses.*

## SYSTEM 02 — OF 07

# Sales Follow-Up & CRM Hygiene

# 02

*Everything between “lead is qualified” and “deal is won or dead.” The follow-up cadence, the notes, the CRM stage discipline.*

**AUDIT QUESTIONS**

- ? What's your average follow-up cadence after a first call? Written down or vibes?
- ? How many touches before a lead is “cold”?
- ? When did you last audit your CRM for stale deals stuck in one stage for 30+ days?
- ? Who writes the call notes — and does anyone read them later?

**RED FLAGS — 2+ = PRIORITY**

- × Reps re-introduce themselves to leads they've already talked to.
- × Pipeline stages are full of deals nobody can give a current status on.
- × Call notes are either non-existent or unreadable.
- × Forecasting is a guess, not a number you trust.

**AI OPPORTUNITY**

AI follow-up co-pilot: auto-drafts the next message based on call transcript + deal stage, flags deals that haven't moved in N days, writes the CRM notes for you, and produces an honest weekly pipeline summary instead of vibes.

**ROI BALLPARK**

*Most reps recover 4–8 hrs/week. Close rates lift 10–25% because no deal goes silent. Easiest ROI in the entire stack.*

SYSTEM 03 — OF 07

# Cold Outbound (Email + LinkedIn)

03

*How you generate net-new pipeline that didn't come in through a referral or paid ad.*

## AUDIT QUESTIONS

- ? Do you have an outbound motion at all? If yes — who runs it?
- ? How do you build target lists today? Apollo, ZoomInfo, manual scraping, gut feel?
- ? What's your reply rate on a typical cold sequence? (If you don't know, that's a flag.)
- ? How personalized is your outreach — really? Read your last 5 cold emails out loud.

## RED FLAGS — 2+ = PRIORITY

- × You sound exactly like every other vendor in your category.
- × Lists are stale within 2 weeks of being built.
- × You're sending high volume but reply rate is under 2%.
- × Nobody owns outbound — it's “when we have time.”

### AI OPPORTUNITY

Outbound engine: AI builds lists from your ICP definition (firmographic + technographic filters), researches each prospect, drafts personalized first-touch emails in your voice, and handles reply routing. Human approves and sends.

### ROI BALLPARK

*Most SMBs double meeting volume in 60 days. The killer metric isn't reply rate — it's qualified replies per hour of human time spent.*

SYSTEM 04 — OF 07

# 04

## Inbound Support & Tier-1 FAQ

*Every question a prospect or customer asks that you've answered before. Pricing, scope, timelines, "do you do X?"*

### AUDIT QUESTIONS

- ? What are the 10 most common questions in your inbox right now? Write them down.
- ? How many of those are answered somewhere in your documentation, FAQ, or website?
- ? Average response time to a question? Median, not your best day.
- ? How often does a question route through 2+ people before getting answered?

### RED FLAGS — 2+ = PRIORITY

- ✗ You're answering the same 5 questions every week.
- ✗ Customers wait 24+ hours for answers you could give in 2 minutes.
- ✗ Internal Slack threads exist to answer questions that are already documented.
- ✗ Founders are doing Tier-1 support past month 12.

#### AI OPPORTUNITY

Tier-1 support agent trained on your FAQ, pricing, scope, and historical replies. Answers ~70% of inbound directly, drafts a reply for human approval on the rest, and routes anything sensitive (refunds, churn risk) straight to a person.

#### ROI BALLPARK

*Median founder reclaims 6–12 hrs/week. Customer NPS lifts because answers come back in minutes, not days.*

## SYSTEM 05 — OF 07

# Internal Ops & Admin

# 05

*Invoicing, scheduling, document drafting, contracts, expense reports — the quiet drag on every business.*

**AUDIT QUESTIONS**

- ? How long does it take you to send a new client their kickoff docs (contract, invoice, onboarding)?
- ? Who reconciles your numbers each month? How long does it take?
- ? What's your slowest admin task — the one you procrastinate on?
- ? Do you have a written SOP for it, or does it live in someone's head?

**RED FLAGS — 2+ = PRIORITY**

- ✗ Invoices go out late or get forgotten.
- ✗ Contracts are copy-paste from a Google Doc with manual find-and-replace.
- ✗ Scheduling takes 4+ emails to land a time.
- ✗ Bookkeeping is a once-a-quarter panic.

**AI OPPORTUNITY**

Document generator + reconciliation agent: contracts, invoices, scopes, and follow-up letters drafted from a single intake form. Recurring admin (categorizing transactions, drafting status updates) handled by an agent that asks for human approval before sending.

**ROI BALLPARK**

*5–10 hrs/week of low-leverage time eliminated.  
Usually the system founders say they want last but feel the most relief from once it ships.*

SYSTEM 06 — OF 07

# Knowledge & SOPs

06

*The internal brain of the company. The answers to “how do we do X here?” that aren’t documented but should be.*

## AUDIT QUESTIONS

- ? If your top performer left tomorrow, what % of their knowledge would walk out the door?
- ? Where do new hires actually go to learn how things work — docs, Slack search, asking around?
- ? When you discover a better way to do something, where does it get recorded?
- ? How often do you re-explain the same internal process to a different person?

## RED FLAGS — 2+ = PRIORITY

- × Onboarding new hires takes weeks because nothing's written down.
- × Same questions get asked in Slack every month.
- × Two people on the team do the same task two different ways.
- × Process improvements live in someone's head and die with their attention.

### AI OPPORTUNITY

Internal Q&A; bot indexed on your docs, past Slack messages, Notion/Confluence, and SOPs. Anyone on the team can ask “how do we do X?” and get a sourced answer. Surfaces gaps where no documentation exists so you can fill them.

### ROI BALLPARK

*New-hire ramp time cuts in half. The compounding ROI is harder to measure but bigger than any other system — it's how a 5-person team starts operating like a 15-person team.*

SYSTEM 07 — OF 07

# Reporting & Dashboards

07

*How you actually know what's working. Numbers a human looks at to make decisions — not vanity metrics in 12 tools.*

## AUDIT QUESTIONS

- ? What are the 3–5 numbers you'd want to see every Monday morning?
- ? Can you currently get them in under 5 minutes, without pulling reports manually?
- ? Who builds your reports today? How long does it take?
- ? When was the last time a dashboard changed a decision you made?

## RED FLAGS — 2+ = PRIORITY

- × Numbers live in 4+ tools that don't talk to each other.
- × Weekly review is “whoever shouts loudest about their priority wins.”
- × Reports get built once and never updated.
- × You measure activity (emails sent, calls made) instead of outcomes (revenue, retention).

### AI OPPORTUNITY

Unified reporting agent: pulls from your CRM, billing, analytics, and ad platforms; writes a plain-English weekly summary of what moved and what didn't; surfaces anomalies before you have to ask.

### ROI BALLPARK

*The hidden ROI here is decision quality, not time saved. Most teams add 10–15% to revenue inside 6 months once they're actually measuring the right things.*

## WHAT'S NEXT

# You've done the audit. Now what?

If you went through all seven systems honestly, you probably have 1–2 obvious candidates for an AI build and 2–3 that need cleanup before AI would even help. That's the right place to land. The mistake is trying to fix all seven at once.

If you want a second set of eyes on it — applied to your actual business, with a workflow review and ROI estimates mapped to your numbers — book a free call with me. We'll walk through what you found and pinpoint the one system worth building first.

## THE NATURAL NEXT STEP

## Book a free call with me

We review your audit together, find the highest-ROI place to start, and map what to build first. No pitch, no commitment — just a clear next step.

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— **Carter Simmons**

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