

SAMPLE — PREPARED FOR A FICTIONAL BUSINESS TO SHOW WHAT YOU RECEIVE

Workflow Audit Report

Cedar & Stone Landscaping (sample client) · Prepared by Sol Jin, Banchan Studios

AUDIT DATE	One 40-minute walkthrough call
BUSINESS	8-person landscaping company — 2 crews, 1 office manager
WHAT WAS REVIEWED	Lead intake → scheduling → job tickets → invoicing → follow-up
FINDINGS	6 total: 3 worth fixing with software, 1 off-the-shelf fix, 2 leave as-is
COST OF THIS REPORT	\$0 — the audit is free, and this report is yours to keep

How to read this report

Each finding describes something I observed in how work actually flows, what it costs in hours or missed revenue, and what I recommend — with a flat price and a payback estimate.

Recommendations are ranked by payback, not by project size. Two findings recommend **no custom software at all**: an honest audit tells you what *not* to buy, too.

Even if we never work together, pages 2–4 double as a checklist: the six patterns here are the six most common ways small service businesses lose hours, and you can hunt for them yourself.

FINDING 1 — LEAD RESPONSE**Leads sit overnight — and the fast competitor wins**

What I observed. Website and Google inquiries land in a shared inbox checked in the morning and around lunch. In the sample week, 11 of 26 inquiries arrived after 4pm; median first reply was the next business day. Two customers replied "already booked someone."

What it costs. At a typical close rate and average job value, even one lost after-hours lead per week is roughly \$1,500–\$4,000/month in missed revenue. Speed, not marketing, is the constraint.

Recommendation. An automated lead responder: replies within minutes at any hour in your voice, asks your qualifying questions (location, service, timeline), and texts a summary so the hottest lead gets the first call back.

Est. cost: \$2,500 + \$150/mo	Est. payback: 4–8 weeks	Priority: HIGH
-------------------------------	-------------------------	----------------

FINDING 2 — DOUBLE ENTRY**Job details are written three times**

What I observed. Crew leads record work on paper tickets. The office manager re-types tickets into invoices, then logs totals in a separate spreadsheet. Same information, three hands, three chances for a mistake.

What it costs. Roughly 5–6 hours/week of office time, plus invoice errors that customers catch first — which delays payment and dents trust.

Recommendation. A single-entry job tool shaped like the paper ticket crews already use: enter the job once; the invoice, records, and weekly totals follow automatically.

Est. cost: \$3,200 flat	Est. payback: under 3 months	Priority: HIGH
-------------------------	------------------------------	----------------

FINDING 3 — QUOTE FOLLOW-UP**Estimates go out — then nothing follows up**

What I observed. Estimates are emailed and then tracked "mentally." No one could tell me how many quotes from last month were still open. Follow-up happens if a customer calls back.

What it costs. Industry-typical: a meaningful share of stale quotes close with one or two polite nudges. Silent quotes are the cheapest revenue you are currently not collecting.

Recommendation. Automatic follow-up on unanswered estimates (day 3 and day 8, in your wording), with a simple open-quotes list so nothing goes quiet by accident. Can be bundled with Finding 2.

Est. cost: \$1,200 (bundled)	Est. payback: 1–2 months	Priority: HIGH
------------------------------	--------------------------	----------------

FINDING 4 — REPUTATION**Review requests happen "when we remember"**

What I observed. Happy customers are rarely asked for a Google review; the last one is months old. Competitors with weaker work but fresher reviews rank above you locally.

What it costs. Hard to price precisely, but local search placement drives inbound calls, and reviews drive placement.

Recommendation. No custom software needed. An off-the-shelf review-request tool (typically \$30–60/mo) that texts customers after job completion covers this. I can recommend one and set it up in an afternoon — buying a custom build here would be wasting your money.

Est. cost: \$0 build	Est. payback: immediate	Priority: MEDIUM
----------------------	-------------------------	------------------

FINDING 5 — SCHEDULING**Scheduling: leave it alone**

What I observed. The whiteboard-plus-group-text system looks informal but works: crews know where to be, changes propagate fast, and no jobs were missed in the period we discussed.

What it costs. Nothing material. The system fits the size of the operation.

Recommendation. No change. Custom scheduling software would cost more than it saves at 2 crews. Revisit at 4+ crews.

Est. cost: \$0	Est. payback: n/a	Priority: NONE
----------------	-------------------	----------------

FINDING 6 — VISIBILITY**The numbers live in the owner's head**

What I observed. Questions like "how did last month actually do?" require an evening with the spreadsheet. Decisions about hiring and equipment are made on gut feel.

What it costs. No immediate cash cost — but it makes every other decision slower and riskier.

Recommendation. A one-screen dashboard fed by the job tool (Finding 2): jobs, revenue, open quotes, unpaid invoices. Worth doing after the high-priority items, not before.

Est. cost: \$1,800 (after F2)	Est. payback: "sleep better" timescale	Priority: LOW
-------------------------------	--	---------------

Summary & suggested order

#	Finding	Fix	Est. cost	Payback	Priority
1	Leads sit overnight	Lead responder	\$2,500 + \$150/mo	4–8 wks	HIGH
2	Triple data entry	Single-entry job tool	\$3,200	<3 mo	HIGH
3	No quote follow-up	Auto follow-ups	\$1,200 bundled	1–2 mo	HIGH
4	Few recent reviews	Off-the-shelf tool	\$0 build	now	MED
5	Scheduling	No change	\$0	—	—
6	No visibility	Dashboard (later)	\$1,800	—	LOW

If the budget covers one thing this quarter, do **Finding 1** — it recovers revenue rather than saving time, and pays for everything else. Findings 2+3 together retire most of the office busywork. Total for all recommended custom work: **\$6,900 flat**, delivered in stages so each piece proves itself before the next begins.

The self-audit checklist

Want to spot these patterns yourself? Six questions: (1) How fast does a 7pm inquiry get a reply? (2) Is any information typed more than once? (3) Can you list your open quotes right now? (4) When did you last ask a happy customer for a review? (5) Does your scheduling system drop jobs — or just look messy? (6) Can you see last month's numbers in under a minute? Every "ouch" is a finding.

What happens next

Nothing, unless you want it to. This report is yours: act on it yourself, hand it to another developer, or shelve it. If you'd like my help, pick a finding and I'll scope it to a fixed price and timeline in writing — hello@soljin.io, or book a call at calendly.com/hellosoljin/30min.

This sample describes a fictional business assembled from patterns I see repeatedly in real audits. Your report will be about yours.