



SAMPLE AUDIT, INVENTED BUSINESS

AI AUDIT • LARKSPUR ROAD INSURANCE AGENCY

**6.5 HOURS
A WEEK**

Your numbers, added up. Yours to keep.

About \$22,807 a year back.

About \$12,225 net return in year one, \$15,103 a year after that.

Minutes a week back to you, after the reading and sending that stays yours, priced at your own number over 50 working weeks. Rows marked estimated are my read of what you described; the rest are your own count. The right side is your investment to get them back, also estimated.

\$22,807

A YEAR BACK

MINUTES BACK A WEEK • DOLLARS A YEAR

 Customer service	83 min • \$4,842
 Email & inbox	61 min • \$3,558
 CRM	43 min • \$2,508
 Data entry	43 min • \$2,508
 Sales process	40 min • \$2,333
 Documents	20 min • \$1,167
 Financial software	19 min • \$1,108
 Content & marketing	19 min • \$1,108
 Scheduling	18 min • \$1,050
 Team & delegation	18 min • \$1,050
 Networking	14 min • \$817
Meetings	13 min • \$758

\$10,582

YEAR ONE INVESTMENT

The Setup, two hours with me (includes month one of Accelerate)	\$1,397
Your 2 hours in that session, at \$70/hr	\$140
Getting the 15 builds working, about 10.7 hours of yours at \$70/hr (estimated)	\$747
Testing and fixing as you go, 10% of the hours back (estimated)	\$2,281
Accelerate for the other 11 months of year one	\$6,017

\$12,225

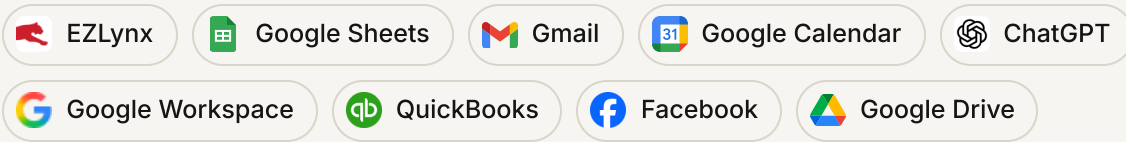
NET RETURN ON
INVESTMENT

Net return on investment, year one \$12,225

Every year after: \$22,807 back, less 5% for upkeep and 12 months of Accelerate \$15,103

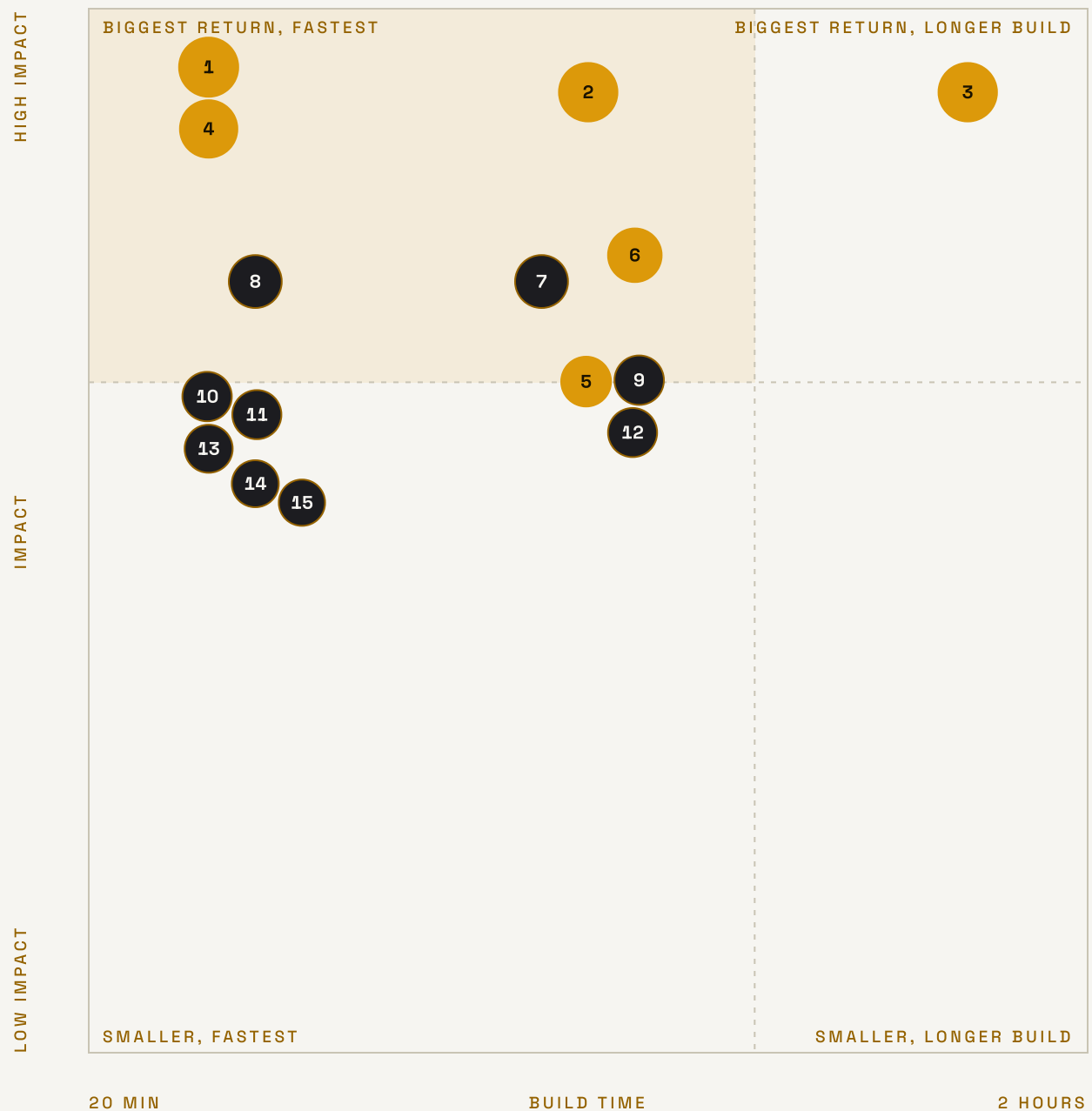
PAYS BACK THE SETUP, YOUR 2 SESSION HOURS AND YOUR 10.7 BUILD HOURS IN MONTH 2, AFTER THE TOOLS, THE TESTING AND THE PLAN





Where each one sits.

Gold is what to do first. Left to right is build time, not difficulty. Numbers match the list that follows.



All 15, nothing left out.

Each one runs from day one, some on your word, some on their own. Row returns are before the Setup, your own hours in that session and the monthly plan, which page 2 counts once.

#	WHAT YOU DO NOW	WHAT IT BECOMES	SAVES A YEAR	RETURN, YEAR ONE
DO FIRST • START HERE				
1	 Email & inbox 10 min, 1 time a day Going through carrier notices in the inbox: non-pay cancellations, underwriting requests, audits	Each morning it pulls the carrier notices out of the inbox and lists the ones with a deadline, soonest first.	\$2,625 50 → 5 min a week	\$2,339 about 20 min to build (est.)
2	 CRM 20 min, 8 to 12 times a month • estimated Remarketing renewals with a big premium jump: pulling the renewal, requoting and writing it up	Every month it lists the renewals up more than 15 percent and, once you requote, drafts the note to each client.	\$2,042 to \$3,033 48 → 5 min a week	\$2,188 about 1 h to build (est.)
3	 Data entry 6 min, 6 to 10 times a week • estimated Re-keying web quote requests into EZLynx before running the rater	It reads each web quote request and drafts the EZLynx applicant entry, ready for you to check and run the rater.	\$1,867 to \$3,150 48 → 5 min a week	\$2,118 about 2 h to build (est.)
4	 Sales process 8 min, 4 to 7 times a week • estimated Laying out the carrier quotes side by side in an email to the client	Drop in the rater results and it writes the side-by-side email in plain words, with your pick on top.	\$1,692 to \$2,917 44 → 4 min a week	\$2,077 about 20 min to build (est.)
5	 Documents 8 min, 4 to 6 times a week • estimated Processing policy changes, like adding a car or a driver, in the carrier portal and noting the file	Send it the client's text and it writes the change request and the EZLynx note, ready to submit to the carrier.	\$933 to \$1,400 40 → 20 min a week	\$980 about 1 h to build (est.)
6	 Customer service 8 min, 3 to 5 times a week • estimated Issuing certificates of insurance for contractor clients	Forward the certificate request and it fills in the certificate from the policy and drafts the email to the holder.	\$1,283 to \$2,100 32 → 3 min a week	\$1,453 about 1 h to build (est.)
THEN, IN ORDER OF WHAT THEY GIVE BACK				
7	 Customer service 3 min, 8 to 12 times a week • estimated Emailing ID cards and proof of insurance when clients call or text for them	Paste in the client's request and it finds the right ID card in the file and drafts the reply, ready to send.	\$1,283 to \$1,867 30 → 3 min a week	\$1,348 about 1 h to build (est.)

III EVERYTHING WE FOUND, CONTINUED

#	WHAT YOU DO NOW	WHAT IT BECOMES	SAVES A YEAR	RETURN, YEAR ONE
8	 Customer service 15 min, 1 to 3 times a week · estimated Taking first notice of loss from clients and typing up the claim details for the carrier	Tell it what the client said and it writes the claim report for the carrier and the note for the file.	\$817 to \$2,392 30 → 3 min a week	\$1,394 about 20 min to build (est.)
9	 Financial software 90 min, 1 time a month Reconciling carrier commission statements against the policies written	Once a month it checks every carrier's commission statement against the policies written and lists what is missing.	\$1,108 22 → 3 min a week	\$927 about 1 h to build (est.)
10	 Content & marketing 90 min, 1 time a month Putting together the monthly client email newsletter	Once a month it drafts the newsletter from the questions clients asked and the season's weather claims.	\$1,108 22 → 3 min a week	\$974 about 20 min to build (est.)
11	 Scheduling 5 min, 3 to 5 times a week · estimated Setting up policy review appointments by email back and forth	It sends the client your booking link and the review lands on the calendar with the policy file attached.	\$817 to \$1,342 20 → 2 min a week	\$922 about 20 min to build (est.)
WORTH ADDING  Calendly free with one link, then \$12 a month or  King Calendly , free with me				
12	 Team & delegation 20 min, 1 time a week Making the week's task list for the two customer service reps	Every Monday it builds each rep's list from the open renewals, changes and certificates.	\$1,050 20 → 2 min a week	\$875 about 1 h to build (est.)
13	 Email & inbox 5 min, 2 to 5 times a week · estimated Calling and emailing clients who got a cancellation notice for non-payment	When a non-pay notice arrives it drafts the email with the amount and the date, and keeps the list of who still owes.	\$525 to \$1,342 18 → 2 min a week	\$817 about 20 min to build (est.)
14	 Networking 5 min, 2 to 4 times a week · estimated Sending thank-you notes to the realtors and lenders who refer clients	When a referred client binds, it drafts the thank-you to the realtor or lender who sent them.	\$525 to \$1,050 15 → 1 min a week	\$712 about 20 min to build (est.)
15	Meetings 15 min, 3 to 5 times a month · estimated Typing up notes after annual policy reviews held in the office	Record the review and it writes the file note and the follow-up list for the rep.	\$583 to \$933 14 → 1 min a week	\$659 about 20 min to build (est.)
WORTH ADDING  Otter free to 300 minutes a month, then \$17 a month				

Not on your plate today.

Things you said you want that nobody is doing by hand today, so they carry no dollar number. The by-hand figures are my estimate of what each would cost you to run yourself.

ON YOUR LIST	WHAT IT BECOMES	BUILD	BY HAND
A monthly list of home-only clients who could bundle auto or an umbrella	Once a month it finds the home-only clients and drafts a bundle offer for each one.	about 1 h, once	about 1.5 h each 1 a month, ongoing
A plain-words coverage summary for every new client	It writes every new client a one-page summary of what is covered and what is not.	about 20 min, once	about 20 min each 4 to 8 a month, ongoing

One two-hour session turns it on.

The session is \$850, on your machine, on your accounts. You leave with the first wins running, or the Setup is free.

Cruise

\$147 a month

The full system, the community, the weekly call. You run it.

Start at \$997: the Setup plus month one

FITS WHAT YOU
DESCRIBED

Accelerate

\$547 a month

Cruise, plus an hour of my time every month.

Start at \$1,397: the Setup plus month one

Overdrive

\$1,197 a month

Accelerate, with three hours a month. I sit inside the business.

Start at \$2,047: the Setup plus month one

BOOK THE SETUP

Not ready for a plan? A one-off working session runs \$497.

This audit is yours either way. Take it to someone else or do it yourself. The numbers still hold.