

— AI COMPANY ASSESSMENT

# AI Tools Assessment

*Prepared for Pinecrest Media*

Assessment Date: 2025-12-23

# Your 45-Minute Assessment

During our call, founder Sarah Chen walked us through Pinecrest Media's day-to-day operations. Here's what stood out:

- **Marketing reporting is eating full mornings.** Sarah manually pulls data from Google Analytics, Meta Ads, and three scheduling platforms every Monday to build client reports — 4+ hours before she can do actual work.
- **Meeting action items vanish.** The team runs 8-10 client calls per week with no structured note-taking. Follow-ups live in scattered email threads and "I thought you were handling that" is a recurring theme.
- **Inbox is a warzone.** Between client emails, vendor pitches, and newsletter subscriptions, Sarah and her account manager spend the first hour of each day just triaging what matters.
- **Design tasks keep pulling the founder in.** Even with a junior designer on staff, Sarah gets pulled into "quick" design requests 4-5 times per week because there's no brand kit or template system.

**Current tools:** Gmail, Google Calendar, Canva (basic), Google Analytics, Asana

Bottom line: we found **16+ hours/week of recoverable time** across your team's workflow.

# Impact-Effort Matrix

Your pain points mapped to four quadrants. This report focuses on Quick Wins — high value, low effort.

## Quick Wins

HIGH IMPACT · LOW EFFORT

## Major Projects

HIGH IMPACT · HIGH EFFORT

## Ignore These

LOW IMPACT · LOW EFFORT

## Fill-ins

LOW IMPACT · HIGH EFFORT

## Quick Wins

- 01 Manual client reporting → DashThis
- 02 Lost meeting action items → Fathom
- 03 Email overload → SaneBox
- 04 Design bottleneck at founder → Canva Brand Kit

## Major Projects

- 01 GoHighLevel CRM for lead management
- 02 Brand voice Claude skill for content

# Quick Wins

01

## 4+ hours every Monday manually building client reports

### DASHTHIS

Connects to Google Analytics, Meta Ads, and your scheduling platforms. Auto-generates branded client dashboards that update in real time — no more Monday morning data pulls.

Complexity: **some setup** Cost: **\$42/mo** Setup: **1-2 hours** Time Saved: **5 hrs/week**

02

## 8-10 client calls per week with no structured notes

### FATHOM

Auto-joins every call, captures full transcripts, and extracts action items. Since you're already on Asana, Fathom can push tasks directly into your project boards.

Complexity: **plug-and-play** Cost: **\$0 (free tier)** Setup: **15 minutes** Time Saved: **4 hrs/week**

03

## First hour of every day lost to inbox triage

### SANEBOX

Learns which emails matter and moves everything else out of your primary inbox. Works with Gmail — no workflow changes, just less noise.

Complexity: **plug-and-play** Cost: **\$7/user × 2** Setup: **10 minutes** Time Saved: **3 hrs/week**

04

## Founder pulled into 4-5 "quick" design requests per week

### CANVA BRAND KIT + MAGIC DESIGN

Build your brand kit once (colors, fonts, logos, templates). Your junior designer — and even account managers — can produce on-brand assets without pulling Sarah in.

Complexity: **some setup** Cost: **\$0 (already using)** Setup: **1-2 hours** Time Saved: **4 hrs/week**

# Your 4-Day Quick Wins Plan

## DAY 1

**Set up Fathom, connect to Google Calendar and Asana**

Fathom · 15 min

## DAY 2

**Set up SaneBox for Sarah and account manager**

SaneBox · 10 min

## DAY 3

**Build Canva Brand Kit — upload colors, fonts, logos, 5 core templates**

Canva · 1-2 hrs

## DAY 4

**Set up DashThis, connect analytics, build first client dashboard**

DashThis · 1-2 hrs

— FINANCIAL IMPACT

# The Math

Based on \$100/hour loaded employee cost · 4.33 weeks/month

TOOL	TIME SAVED	MONTHLY VALUE	MONTHLY COST
DashThis	5 hrs/week	\$2,165	\$42
Fathom	4 hrs/week	\$1,732	\$0
SaneBox	3 hrs/week	\$1,299	\$14
Canva Brand Kit	4 hrs/week	\$1,732	\$0
<b>Total</b>	<b>16 hrs/week</b>	<b>\$6,928</b>	<b>\$56</b>

MONTHLY NET ROI

**\$6,872**

ANNUAL NET ROI

**\$82,464**

PAYBACK PERIOD

**< 1 week**

# What Comes Next

Once quick wins are running, these high-impact projects are worth scoping.

## GoHighLevel CRM

Consolidate your leads, automate follow-up sequences, and give Sarah a single pipeline view instead of spreadsheets + Asana + email threads.

\$2K – 4K 2-3 weeks

## Brand Voice Claude Skill

A trained Claude project that writes social posts, email campaigns, and blog drafts in Pinecrest’s exact voice — so Sarah stops being the only person who can “sound like us.”

\$500 – 1K 1 week

## Custom GPT for AirBnB

A guest-facing assistant that handles FAQs, local recommendations, check-in instructions, and common requests — reducing Sarah’s personal response load.

\$1K – 2K 1-2 weeks

— YOUR NEXT STEPS

# Start Monday.

1

## Implement the 4 Quick Wins

Follow the 4-day plan exactly as outlined. Total setup time: under 5 hours. Time reclaimed: 16 hours every week, starting week one.

2

## Schedule a 30-minute Review Call

Two weeks after implementation, we'll review what's working, adjust anything that isn't, and scope the next phase if you're ready.

[Schedule Your Review Call →](#)