

NORTHFRAME AUTOMATION

# The Florida SMB Operations Audit Checklist

How to find \$10K/month hiding in your workflow.  
A 20-minute self-audit for owners who are tired of  
running the business on memory.

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[northframeautomation.com](http://northframeautomation.com)

# Why This Checklist Exists

Most small businesses don't have a revenue problem. They have a leak problem.

The phone rings and nobody catches it. An estimate gets sent and nobody follows up. An invoice sits in a customer's inbox for 40 days because nobody reminded them. A happy customer leaves without ever being asked for a review.

None of those things feel like emergencies in the moment. Added up over a month, they're the difference between a business that's growing and one that's stuck.

We built this checklist from what we actually find when we audit Florida home services companies and clinics. Every section is something we've seen cost a real business real money. Go through it honestly. Give yourself a yes only when you're certain — "mostly" is a no.

At the end you'll have a score, a short list of the places you're bleeding the most, and a rough estimate of what it's costing you.

**Time to complete:** about 20 minutes with your ops manager or front desk lead. You don't need any reports. You already know the answers.

## HOW TO USE IT

1. Print it, or work through it on screen.
2. For each question, circle **Y** or **N**. No "kind of."
3. At the end of each section, count your Ns.
4. Read "what good looks like" and "the cost of getting it wrong."
5. On the last page, use the scoring guide to see where to start.

## 1 · Lead Response

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The first 5 minutes after a lead comes in are worth more than the next 5 hours. Most businesses lose money here before they even know they have a problem.

- Every inbound call is answered by a human or captured by a system that replies within 60 seconds.
- Missed calls trigger an automatic text back with a name, link, or next step.
- Web form submissions get an acknowledgment email or text within 5 minutes.
- After-hours leads are captured and triaged before the next morning's first coffee.
- You can pull a list of every lead from the last 30 days without logging into three different tools.
- You know your current lead-to-booked-job rate. Not a guess — a number.
- No lead has fallen through the cracks in the last 30 days that you're aware of.

**What good looks like:** Every lead — call, form, referral, DM — lands in one place. Every lead gets a response within 5 minutes, even at 9pm. You can see a running count today, this week, this month, and what converted.

**The cost of getting it wrong:** 40–60% of missed calls don't call back. For a home services company running \$300 average tickets, 15 missed calls a month is \$2,700–\$4,500 in lost booked work, every month. For clinics, one missed new-patient call is \$2,000–\$4,000 in lifetime value walking away.

## 2 · Quote and Estimate Workflow

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The estimate stage is where most businesses' pipelines quietly die. The quote goes out. Nobody ever hears anything. Six weeks later, the customer hired the next guy on Google.

- Quotes go out within 24 hours of the site visit or inquiry — every time.
- Every quote is tracked in a system that shows its status (sent, viewed, accepted, declined).
- Unaccepted quotes get an automatic follow-up at day 2, day 5, and day 10 without anyone remembering to send them.

- You know this month's quote-to-close rate. A real number, not "good" or "fine."
- Declined or ghosted quotes get a polite "anything we can do" message before being closed out.
- You can see how much pipeline is sitting in "sent but not decided" right now.
- No single person is a bottleneck for quotes going out the door.

**What good looks like:** A dashboard shows every open estimate, how old it is, and whether the customer has opened it. Follow-ups happen on a schedule, not on someone's memory. You know your close rate well enough to spot it dropping before the month ends.

**The cost of getting it wrong:** For a roofing or HVAC company doing \$25K/month in quoted work, going from a 22% close rate to a 30% close rate by just following up on time is \$2,000+ in recovered revenue per month — work you already won, you just didn't collect on it.

### 3 · Customer Communication

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Most customer complaints aren't about the work. They're about not knowing what was happening. The fix is almost always cheaper than you think.

- Customers get an automatic confirmation the moment an appointment is booked.
- A reminder goes out 24 hours before the visit, and another the morning of.
- "Tech is on the way" notifications go out automatically — not typed by a dispatcher between other fires.
- After the job, customers get a short thank-you and a clear next step (pay, schedule, review).
- Two-way texting is available — customers can reply and someone on your team sees it.
- You can look up every message sent to a customer in the last 90 days in one place.

**What good looks like:** The customer always knows what's coming next without having to ask. Nobody on your team types the same message twice in a day. Replies are visible to the whole team, not buried in a personal phone.

**The cost of getting it wrong:** A single no-show because the customer forgot is an hour of truck time plus the next job running late. A frustrated "I had no idea when you were coming" review costs more than you'd think when the next five prospects read it.

### 4 · Scheduling and Dispatch

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This is where operations either hum or fall apart. If your schedule lives in one person's head or on a whiteboard, you're one sick day from chaos.

- The full schedule for today, tomorrow, and next week is visible to everyone who needs it — from any device.
- New jobs get added to the schedule in under 2 minutes, with no double-entry.
- Techs get their day's stops, addresses, and notes on their phone — not on a paper sheet.
- Reschedules update everyone — office, tech, and customer — automatically.
- There's a clear rule for how jobs get assigned (skill, zone, capacity) — not "whoever's free."

- You can see, today, how much capacity is open this week without calling anyone.
- Cancellations automatically trigger an attempt to fill the slot.

**What good looks like:** The schedule is one system, visible everywhere, with every change propagating on its own. Techs start their day on their phone. The office spends zero minutes a day relaying schedule info by text.

**The cost of getting it wrong:** One unfilled slot a day at a \$250 average ticket is \$65,000 a year in capacity sitting idle. Most shops have three or four.

## 5 · Invoicing and Collections

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This is the section owners are the most embarrassed about, and the easiest to fix. Money you already earned is sitting in somebody's email being politely ignored.

- Invoices go out the same day the job is completed. Not "by end of week."
- Every invoice has an online payment link (card or ACH), not "mail a check."
- Unpaid invoices get automatic reminders at day 3, day 7, day 14, and day 30.
- You know, right now, how much money is 30+ days past due.
- Nobody on your team spends more than 30 minutes a week chasing payments manually.
- Paid invoices reconcile themselves with your books — you're not re-entering them anywhere.

**What good looks like:** Invoices leave the shop before the truck does. Reminders run on their own. Your AR report shows a small number and a flat trend line. "Chasing money" isn't a job anyone owns because nothing needs chasing.

**The cost of getting it wrong:** The average SMB carries 15–25% of monthly revenue in 30+ day AR. On a \$80K/month shop, that's \$12K–\$20K of your money parked somewhere it shouldn't be, and the cash flow hit lands right when you need to make payroll.

## 6 · Review Generation

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Your next ten customers are going to Google you before they call. What they see there is worth more than any ad budget.

- Every completed job or visit triggers a review request automatically — not "when someone remembers."
- The request is timed to the peak of customer satisfaction (same day or next morning).
- The request makes it easy — one tap to your Google profile.
- Happy customers get an ask; unhappy ones get routed to you privately first.
- You know how many reviews you've added in the last 30 days.

- Your Google review count is going up every month, not sitting flat for a year.

**What good looks like:** Reviews arrive without anyone on your team thinking about them. Your count goes up by 5, 10, 20 a month instead of 1 or 2. Prospects pick you because you have 180 reviews and the next guy has 12.

**The cost of getting it wrong:** The jump from 20 reviews to 100 reviews — at the same 4.8 rating — is one of the biggest close-rate improvements you can make, and it's free. Not doing it means a permanent discount on every lead you pay for.

## 7 · Reporting and Visibility

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If you're running the business by gut feel, you're making decisions with two-week-old information. That's a luxury most owners can't actually afford.

- You get a daily or weekly summary of what happened — leads, jobs, revenue, AR — without logging into anything.
- You can answer "how many leads did we get last week?" in under 10 seconds.
- You can see close rate, average ticket, and AR trend in one place.
- You know which lead sources are actually producing paying customers, not just calls.
- Your numbers come from one system — not three spreadsheets that never agree.
- You'd notice if revenue dropped 15% this week. This week, not at the end of the month.

**What good looks like:** A morning email tells you everything you need to know about yesterday. A weekly report tells you what changed. You spot problems on Tuesday, not on the 15th of the next month when your bookkeeper calls.

**The cost of getting it wrong:** Most owners discover their slow months six weeks after they started. By then, the fix is twice as expensive.

## Scoring

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Count your **No** answers across all seven sections.

- **0–5 Ns** — You're in rare company. The biggest wins for you will be in reporting and capacity planning, not operations.
- **6–12 Ns** — Where most successful small businesses live. Not on fire, but real money sitting in two or three sections. Tackling the top two is usually a \$3K–\$7K/month improvement.
- **13–20 Ns** — Every week you wait is costing you. Fixes here usually pay for themselves inside 60 days. Pick the section with the most Ns and start there.
- **21+ Ns** — The business is running on the owner's memory and goodwill, not systems. The top three fixes will likely find \$8K–\$15K/month in your first quarter.

## WHAT TO FIX FIRST

1. Circle the section with the most Ns.
2. Inside that section, circle the question that feels like the biggest gap.
3. That's where you start. Not a dozen things — one.

## What This Usually Looks Like in Practice

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A Tampa HVAC shop ran this checklist and scored 17. Their worst sections: Lead Response and Invoicing. Three fixes — missed-call text-back, online payments on every invoice, and a 3/7/14-day reminder sequence — added up to roughly **\$9,200/month** in recovered revenue and collected AR in the first 90 days.

An Orlando dental practice scored 14. Their worst sections: Customer Communication and Review Generation. Two fixes — an automated appointment reminder sequence and a same-day review ask — cut no-shows by **38%** and took them from 31 Google reviews to 112 in six months.

Neither business bought new software they didn't already have. They just stopped relying on someone's memory for things that should run on their own.

### WANT SOMEONE TO ACTUALLY DO THIS WORK?

This checklist is useful even if you never talk to us. Print it, work through it, fix the top two sections yourself. That's probably the single best use of your next Saturday morning.

If you get through it and think *"yeah, but we're never going to actually build this ourselves,"* that's what we do. We run the audit for real, build the systems, and manage them month to month. No long contracts. No pitch decks.

**Book a free 15-minute call:** [northframeautomation.com](https://northframeautomation.com)

**Email:** [hello@northframeautomation.com](mailto:hello@northframeautomation.com)

*We'll tell you where the biggest leaks are — even if you never hire us.*