

AI BUSINESS ASSESSMENT

AI Tools Assessment

Small business runs on time. Let's find more of it.

PREPARED FOR

Harbor & Pine Stays

ASSESSMENT DATE

May 22, 2026

Sample report using anonymous company data for demonstration purposes.

EXECUTIVE SUMMARY

The opportunity at a glance

THE PAIN

Manual marketing reporting, lost meeting action items, and design task interruptions are consuming valuable time and creating friction in an otherwise well-run business.

THE OUTCOME

Targeted tool additions and better process automation can return **8+ hours per week** by eliminating manual steps and protecting strategic focus time.

HOURS YOU CAN RECLAIM WEEKLY

8+

hours / week

Returned to strategic, high-value work.

PRIMARY FOCUS

Efficiency & Time Savings

IMPACT-EFFORT MATRIX

Where to spend your next hour

Your pain points were placed into four quadrants by business impact and implementation effort.

This report focuses on **Quick Wins** — the fixes that deliver the highest value with the least effort.



Quick Wins = High Impact, Minimal Effort

1. Manual marketing reporting across multiple platforms

→ Implement **DashThis** to auto-pull all marketing data into one dashboard

2. No consistent meeting notes or action item capture

→ Set up **Fathom** to auto-join meetings and extract action items

3. Email overload with noise and sales outreach

→ Deploy **SaneBox** to auto-filter unimportant emails to a SaneLater folder

4. Low-level design tasks pulling from strategic work

→ Train **Maya** on Canva's Magic Design AI and create brand kit templates

RECOMMENDED SOLUTIONS

Tools for time back

1 *No consistent meeting notes or action capture*
Fathom.ai

Automatically joins meetings, captures transcripts, and extracts action items so nothing is lost after calls. Integrates with Asana for task handoff.

COMPLEXITY	MONTHLY COST	SETUP TIME	TIME SAVED
Plug & play	\$0–10/user	15 min	2 hrs/wk

2 *Email overload with noise and sales outreach*
SaneBox

Learns which emails matter and moves the rest to SaneLater, dramatically reducing inbox clutter without changing your workflow.

COMPLEXITY	MONTHLY COST	SETUP TIME	TIME SAVED
Plug & play	\$7	10 min	3 hrs/wk

3 *Manual marketing reporting across platforms*
DashThis

Consolidates Google Analytics, Meta Ads, Google Ads, and scheduling platforms into one auto-updating dashboard, eliminating manual reporting.

COMPLEXITY	MONTHLY COST	SETUP TIME	TIME SAVED
Some setup	\$42	1–2 hrs	2 hrs/wk

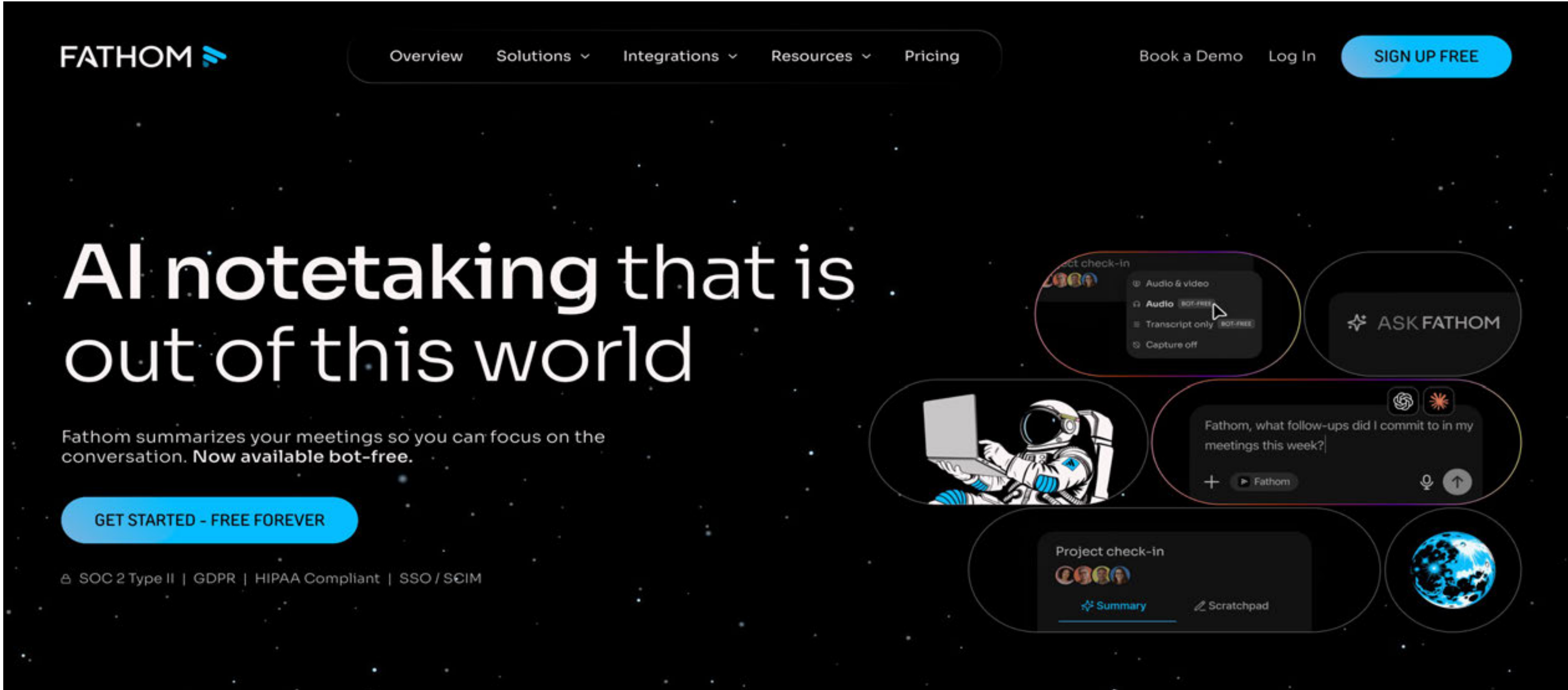
4 *Low-level design tasks pulling from strategy*
Canva Magic Design + Brand Kit


Creates on-brand templates once so recurring designs can be handled without leadership involvement.

COMPLEXITY	MONTHLY COST	SETUP TIME	TIME SAVED
Some setup	\$0 (in use)	1–2 hrs	2 hrs/wk

RECOMMENDED SOLUTIONS

Fathom.ai



FATHOM 

Overview Solutions ▾ Integrations ▾ Resources ▾ Pricing

Book a Demo Log In [SIGN UP FREE](#)

AI notetaking that is out of this world

Fathom summarizes your meetings so you can focus on the conversation. Now available bot-free.

[GET STARTED - FREE FOREVER](#)

SOC 2 Type II | GDPR | HIPAA Compliant | SSO / SCIM

Project check-in

- Audio & video
- Audio BOT-FREE
- Transcript only BOT-FREE
- Capture off

ASK FATHOM

Fathom, what follow-ups did I commit to in my meetings this week?

+ Fathom

Project check-in

- Summary
- Scratchpad

SaneBox.com

Eliminate “Inbox Clutter” with SaneBox AI

SaneBox AI Users Spend On Average 3-4 Hours Less Per Week Managing Their Emails.

- No more email overwhelm.**
- No more wasted hours.**
- Nothing slips through the cracks.**

[Try it now for free](#)

No credit card required.

RECOMMENDED SOLUTIONS

DashThis.com



The screenshot shows the DashThis.com website homepage. At the top left is the DashThis logo. The navigation menu includes 'Book a Demo', 'Product', 'DashThis For', 'Resources', and 'Pricing'. On the right, there are 'SIGN IN' and 'TRY IT FREE' buttons. The main content area features a dark background with the text 'Marketing reporting made easy' in white and teal. Below this, it says 'Get 10 dashboards for 14 days' and includes an email input field and a 'TRY IT FREE' button. Two G2 and Trustpilot review snippets are shown on the right side of the hero section.

RECOMMENDED SOLUTIONS

Canva.com



Design Product Plans Business Education Help

Sign up

Log in

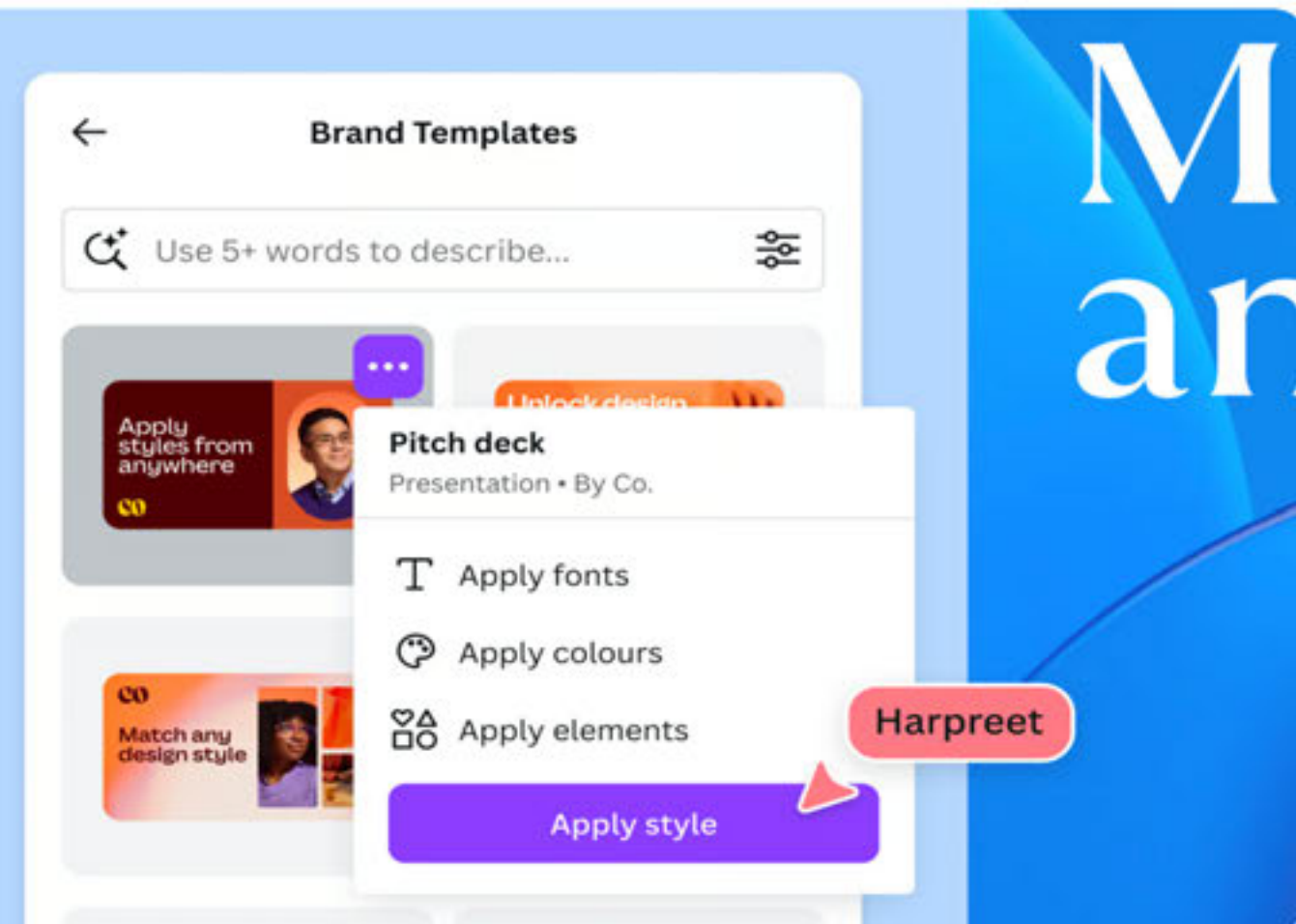
Business Solutions **Features** Case studies Resources Canva Business Canva Enterprise

Create at scale with Brand Templates

Take charge of your brand and create compelling content, fast.

Try Canva Business

Contact sales



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QUICK WINS PLAN

Your 4-day quick wins plan

Day 1



Set up Fathom and connect it to Google Calendar.

Fathom

Day 2



Set up SaneBox and connect it to Gmail.

SaneBox

Day 3



Create a Canva Brand Kit with colors, fonts, and logos.

Canva

Day 4



Sign up for DashThis and connect Google Analytics.

DashThis

What comes after quick wins

01

Set up **GoHighLevel CRM** to consolidate leads and streamline sales communication.

02

Create a **Brand Voice Claude Skill** to consistently create content in your voice and style.

03

Set up a **Custom GPT** for Airbnb guests to handle FAQs, local recommendations, and more.

FINANCIAL IMPACT

The assessment that pays for itself

WEEKLY TIME RETURNED

8-9

hours / week

MONTHLY NET ROI

\$3,141

after tool costs

TOTAL TOOL COST

\$59

per month

Eight hours returned every week, against **\$59/month** in tools = a net gain of **\$3,141** every month.

NEXT STEPS

Your next steps

1 Implement the 4 Quick Wins

Follow the plan as outlined to reclaim time and stabilize operations.

2 Schedule a 30-minute Review Call

We'll review results, validate wins, and decide if deeper automation is warranted.

Ready to reclaim your time?

Book your review call to start finding hours.

hello@foundhours.ai