

Nexus AI Solutions

AI Readiness Assessment

Prepared for: **Riverbend CPA Group** Industry: **accounting firm**

Prepared: April 25, 2026

12 hours reclaimed per week	\$4,800 gross savings per month	\$4,650 net value per month
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Implementing the quick wins below puts roughly 12 hours and an estimated \$4,650 per month back into Riverbend CPA Group.

Executive Summary

Riverbend CPA Group is a accounting firm operating with real traction and a real bottleneck. The common thread across every answer you gave is that the business is growing faster than its manual systems can keep up with - leads slip through, data lives in too many places, and a small number of people are doing too much by hand. The recommendations below are sequenced so the first three can be implemented this week without disrupting anything, and the larger builds follow only after the quick wins prove value.

Pain Points We Identified

Leads are slipping through due to slow or missed response [effort: low / impact: high]

Inbound leads that are not answered within minutes routinely go to a competitor. At the current close rate and deal size this represents a meaningful amount of lost revenue every single week.

Business data is scattered across disconnected tools [effort: medium / impact: high]

Jobs, leads, invoices, and customer notes live in separate systems that do not talk to each other. This creates duplicate work, mistakes, and a foggy picture of what is actually happening in the business.

Review generation is inconsistent [effort: low / impact: medium]

Reviews are asked for in person and forgotten in follow-up. Automating the ask at the right moment reliably triples the review rate for service businesses.

Follow-up on quotes and quiet leads falls through the cracks [effort: low / impact: high]

When the owner or sales lead gets busy, warm prospects go cold. A small automated cadence recovers a noticeable percentage of these.

Repetitive manual data entry consumes hours per week [effort: medium / impact: medium]

Tasks like retyping estimates, moving data between tools, and re-sending invoices can be eliminated with basic automation without changing the underlying systems.

Reporting is manual or non-existent [effort: low / impact: medium]

Decisions are being made from memory and spot-checks rather than a live view of the business. A simple dashboard changes the quality of every decision.

One or more key team members are close to burnout [effort: medium / impact: high]

A single overloaded role becomes the hidden ceiling on growth. Moving the lowest-value tasks off that person is the fastest way to unlock capacity.

Recommended Quick-Win Tools

These are off-the-shelf tools you can install this week to address the highest-impact, lowest-effort items from the pain-point map above.

Fathom AI Notetaker (Meeting capture - free tier available)

What it does: Automatically joins every Zoom, Meet, or Teams call, records and transcribes it, and extracts action items into a clean summary.

Solves: Meetings that produce no documented follow-through

Install:

1. Create a free account at fathom.video
2. Connect your calendar so Fathom joins every meeting automatically
3. After your next call, copy the summary and action items into your CRM or Slack

Estimated time recovered: ~3 hrs/week

GoHighLevel missed-call text-back (Lead response - included in our \$1,497/mo retainer or \$1,500 one-time build)

What it does: Every missed inbound call instantly sends the caller a branded SMS that offers to help, collect their question, and book them in.

Solves: Missed calls turning into lost jobs

Install:

1. We build the workflow inside your GoHighLevel sub-account
2. We wire it to your business phone number
3. We test with a live missed call and hand you the dashboard

Estimated time recovered: ~5 hrs/week

Zapier or Make.com automation (Workflow automation - \$20-50/mo tool cost + \$1,500 one-time build from Nexus AI)

What it does: Triggers the next step in your process automatically: form submitted, invoice sent, status updated, team notified, record created.

Solves: Manual copy-paste between tools

Install:

1. Pick the single most repetitive multi-step task
2. We map the current steps and the target automated flow
3. We build, test, and hand off with documentation

Estimated time recovered: ~4 hrs/week

AI Review Request System (Reputation - included in our retainer or \$1,200 one-time build)

What it does: The moment a job finishes, the customer automatically gets a friendly text and email asking for a Google review, with the link baked in. Tracks who responded and who needs a second nudge.

Solves: Inconsistent review generation

Install:

1. We configure a trigger for 'job complete' in your system
2. We write the branded message in your voice
3. We turn it on and report weekly on review growth

Estimated time recovered: ~1 hrs/week

Live Operations Dashboard (Reporting - \$42/mo (Dash This) + \$750 one-time setup)

What it does: Pulls revenue, jobs booked, leads in, leads responded to, and close rate into one live dashboard you can check on your phone.

Solves: Manual reports or no reports at all

Install:

1. We connect to your CRM, ad accounts, and QuickBooks
2. We build the dashboard around the 5 metrics that actually matter for you
3. You get a shareable link and daily email digest

Estimated time recovered: ~2 hrs/week

Your 4-Day Quick-Win Plan

Day 1 (15 min)

Create the free Fathom account and connect it to your calendar so every meeting from tomorrow onward is captured automatically.

Day 2 (20 min)

Send Nexus AI a list of every tool your team touches daily and the single most repetitive task so we can scope your first automation.

Day 3 (10 min)

Pick one recent customer who had a great experience and send a direct review request using the exact wording we supply in the follow-up.

Day 4 (15 min)

Schedule the written walkthrough with Nexus AI to walk through this report and choose which upsell items to tackle first.

What Comes After the Quick Wins

The quick wins above will give you immediate time back. These are heavier builds we can run for you that typically deliver 3x to 10x the monthly value once installed.

Speed-to-Lead AI Agent (\$1,500 one-time)

Why it fits you: At your stated close rate and average deal size, even one additional responded-to lead per week pays for this build in the first month. Works across phone, SMS, web form, and Facebook DM.

Estimated monthly value: \$3,000 - \$10,000+

Process Optimization (\$3,500 one-time)

Why it fits you: Before we automate anything, we map your current process and cut unnecessary steps. Usually we find 2-4 steps that can be removed entirely before any tech gets built.

Estimated monthly value: \$2,000 - \$5,000

GoHighLevel CRM Build-out (\$3,500 one-time + \$297/mo managed)

Why it fits you: You are running a multi-million-dollar business without a real CRM. A proper pipeline, automations, and reporting will change how you see the business in under 30 days.

Estimated monthly value: \$4,000+

Custom GPT Knowledge System (\$3,500 one-time)

Why it fits you: We train a private AI on your pricing, FAQs, materials, and past jobs so routine customer and team questions get answered instantly, 24/7, without pulling you in.

Estimated monthly value: \$2,500+

Monthly Managed AI Operations (\$1,497/mo)

Why it fits you: Ongoing monitoring, tuning, and new automation builds so the system keeps getting smarter while you focus on the business. No long contracts.

Estimated monthly value: \$5,000+

Next Step

When you have had a chance to read through this report, send us a message at nexusaiconcepts.com to lock in a written walkthrough. On that call we will walk through each recommendation together, answer questions, and if it makes sense, scope the first upsell build so you see revenue impact within 30 days.