

Free Checklist

# Where is revenue leaking in your business?

*A simple checklist to spot missed calls, slow follow-up, and execution gaps.*

Use this checklist to identify where demand may be slipping through the cracks in your business. It is designed to help owners, operators, and decision-makers spot hidden operational friction quickly.

## How to use it

Go through each question honestly and quickly.

Mark every weak point where demand may be delayed, missed, or inconsistently handled.

Focus on patterns, not perfection.

Then use the calculator to estimate how much these gaps may be costing you.

Checklist Section

## Inbound demand capture

|                          |  |
|--------------------------|--|
| <input type="checkbox"/> | Are inbound calls answered consistently during business hours? |
| <input type="checkbox"/> | Are after-hours calls handled in a clear and reliable way?     |
| <input type="checkbox"/> | Do website inquiries get a response quickly?                   |
| <input type="checkbox"/> | Are appointment requests acknowledged right away?              |
| <input type="checkbox"/> | Would a potential customer know exactly what to do next?       |

Checklist Section

## Response speed and follow-up

|   |   |
|---|---|
| ■ | Do new leads get a response within minutes instead of hours?    |
| ■ | Is there a standard follow-up process when no one answers live? |
| ■ | Do follow-ups happen reliably, or only when the team remembers? |
| ■ | Are repeated customer questions handled efficiently?            |
| ■ | Do you know where response delays happen most often?            |

Checklist Section

## Operational overload

|                          |   |
|--------------------------|---|
| <input type="checkbox"/> | Does your team get stretched during lunch, peak hours, or evenings?   |
| <input type="checkbox"/> | Are calls, messages, and requests competing for the same attention?   |
| <input type="checkbox"/> | Do staff lose time repeating the same answers over and over?          |
| <input type="checkbox"/> | Do important tasks depend too heavily on who happens to be available? |
| <input type="checkbox"/> | Are there moments where demand clearly exceeds capacity?              |

Checklist Section

## Conversion risk

|                          |  |
|--------------------------|--|
| <input type="checkbox"/> | Could missed calls be turning into lost customers?                 |
| <input type="checkbox"/> | Could delayed replies be causing prospects to move on?             |
| <input type="checkbox"/> | Do no-shows or poor scheduling create avoidable revenue loss?      |
| <input type="checkbox"/> | Do you have any way to estimate the value of missed opportunities? |
| <input type="checkbox"/> | Would better consistency likely improve bookings or conversions?   |

Checklist Section

## AI readiness

|                          |   |
|--------------------------|---|
| <input type="checkbox"/> | Have you identified which interactions are repetitive enough to automate? |
| <input type="checkbox"/> | Do you know what should remain fully human in your business?              |
| <input type="checkbox"/> | Would faster first-response improve your customer experience?             |
| <input type="checkbox"/> | Could AI help reduce pressure without changing your whole workflow?       |
| <input type="checkbox"/> | Are you evaluating AI based on practical execution, not hype?             |

Next step

## Want to estimate the financial impact?

Use the calculator to estimate how missed calls, response delays, and inconsistent follow-up may be affecting your revenue.

Calculator: <https://nocodeagent.ai/calculator/>

Webinar: <https://nocodeagent.ai/webinar>