

# Business Growth Audit

Sample Report | Anonymized Preview

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Client: Houston-based Security Services Company

Industry: Private Security & Contract Guard Services

Audit Period: 14 days

Prepared by JM Multiservices

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*DISCLAIMER: This is a sanitized sample. All client-identifying details have been removed or anonymized. Metrics shown are representative ranges, not guarantees. Actual results depend on implementation quality and business context.*

# 1. Executive Summary

This audit was conducted for a Houston-based private security company providing contract guard services, mobile patrol, and event security to commercial clients across the greater Houston metro area. The company had been operating for 3+ years with steady revenue but was experiencing stalled growth, high lead leakage, and operational bottlenecks in their sales pipeline.

Over a 14-day engagement, we reviewed the company's lead flow, sales process, client onboarding, operational workflows, online presence, and technology stack. We identified 12 distinct revenue leaks and operational gaps, prioritized them by ROI impact, and built a 90-day execution roadmap.

## Key Findings at a Glance

- Speed-to-lead averaged 4+ hours; industry benchmark is under 5 minutes
- Estimated 35-45% of inbound leads were lost before first contact
- No automated follow-up system; all follow-up was manual and inconsistent
- Google Business Profile was incomplete, missing 60% of optimization opportunities
- No review generation system despite strong service delivery
- CRM was underutilized: pipeline stages undefined, no task automation

*Projected impact: By addressing the top 5 issues alone, we estimated a potential revenue increase of \$8,000 - \$15,000/month within 90 days, primarily from reduced lead leakage and faster conversion.*

## 2. Top Revenue Leaks (Excerpt)

Below is a summary of the top 5 issues identified, ranked by estimated revenue impact. The full audit report includes 12 issues with detailed evidence, root cause analysis, and fix recommendations.

#	Issue	Category	Severity	Est. Monthly Impact
1	No missed-call capture	Lead Leakage	Critical	\$3,000 - \$5,000
2	Slow speed-to-lead (4+ hrs)	Sales Process	Critical	\$2,500 - \$4,000
3	No follow-up sequences	Pipeline	High	\$1,500 - \$3,000
4	GBP not optimized	Online Presence	Medium	\$800 - \$1,500
5	Zero review generation	Reputation	Medium	\$500 - \$1,200

### Before vs. After (Projected)

The table below shows current-state metrics compared to projected metrics after implementing the recommended fixes. Projections are conservative estimates based on industry benchmarks and the company's existing lead volume.

Metric	Current State	Projected (90 days)
Speed-to-Lead	4+ hours	< 5 minutes
Missed-Call Capture Rate	0%	85 - 95%
Lead Follow-up Rate (48 hrs)	~30%	90 - 100%
Appointment Show Rate	~55%	75 - 85%
Google Review Count	12 reviews	40 - 60 reviews
Est. Monthly Revenue Impact	Baseline	+\$8,000 - \$15,000

*Note: Projections assume consistent implementation over 90 days. Results are not guaranteed and depend on execution quality, market conditions, and business-specific factors.*

### 3. 90-Day Roadmap (Excerpt)

The full roadmap is organized into three 30-day sprints, each with specific deliverables, owners, and success metrics. Below is a high-level summary.

#### Sprint 1: Quick Wins (Days 1-30)

- Deploy missed-call text-back automation
- Set up automated lead follow-up sequence (SMS + email, 5-touch)
- Define CRM pipeline stages and configure basic automation
- Optimize Google Business Profile (complete all fields, add photos, set up posts)

Success metric: Speed-to-lead under 5 minutes, 90%+ follow-up rate within 48 hours.

#### Sprint 2: Pipeline & Reputation (Days 31-60)

- Launch automated review request system post-service
- Build appointment reminder sequence (reduce no-shows)
- Create quote/proposal follow-up automation
- Set up basic KPI dashboard (leads, conversions, revenue)

Success metric: 20+ new reviews, appointment show rate above 75%.

#### Sprint 3: Scale & Optimize (Days 61-90)

- Implement lead routing and scoring
- Build client onboarding automation
- Refine sequences based on 60-day data
- Conduct readout and plan next quarter

Success metric: Pipeline velocity increase of 25%+, clear ROI documentation.

### 4. Automation Opportunity Map (Summary)

We identified 8 automation opportunities across the business. The top 4 quick wins (implementable in under 2 weeks each) are:

- Missed-call text-back: Auto-SMS within 60 seconds of a missed call
- Lead follow-up drip: 5-touch sequence over 14 days (SMS + email)
- Review request: Automated post-service review request via SMS
- Appointment reminders: 24-hour and 1-hour reminders via SMS

Each automation includes a fixed-price implementation option, scoped separately after the audit.

## 5. What Happens Next

This sample represents approximately 30% of the full audit deliverable. A complete Business Growth Audit from JM Multiservices includes:

- Full Revenue Leak Report with 10-15 issues, evidence, and fix recommendations
- Detailed ROI Prioritization Matrix (impact vs. effort for every issue)
- Complete 90-Day Roadmap with sprint plans, owners, and success metrics
- Automation Opportunity Map with scope estimates and fixed-price options
- Loom video walkthrough of all findings
- 60-minute live readout call with Q&A

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