

AUTOMATION AUDIT

Where a business loses hours to work a system should be doing.

This is a real audit, not a mock-up: the first one we ran, on 9 November 2026, on the outbound sales of a marketing agency in the ELM Tree family. The businesses it was contacting are not named. Every figure comes from the agency's own records as they stood on the day.

RUN	SOURCES READ	FINDINGS	SCORE
9 Nov 2026	5	3, in fix order	None, on purpose

WHAT THIS AUDIT MEASURES

Work a person is doing that a system should be doing, and work two systems are doing without seeing each other.

Status and evidence

Every finding says what we saw and where we saw it.

No score, no dollar figures

No composite number, no projected savings, no invented return.

Absent, never estimated

What we could not measure is marked absent. It is never guessed into the gap.

WHAT WAS READ

- The outreach board's prospect records
- The outreach code that sends and follows up
- The reply, bounce and opt-out findings the board already records
- The AI assistant's outreach files
- The scheduled tasks and the work logs

WHAT WAS NOT MEASURED

ABSENT

The minutes each manual step takes. That needs the owner timed at the keyboard. **For a client, that interview is part of the audit.** Here, counts stand in for time.

THE FINDINGS, IN THE ORDER TO FIX THEM

#	FINDING	STATUS	FIRST MOVE
1	46 emailed prospects frozen behind a confirm step nobody was doing	CRITICAL	Confirm them by hand now; apply detected sends automatically after.
2	Two outreach systems working the same market without seeing each other	HIGH	One store of record that both write to and read from.
3	An opt-out and a bounce left unapplied	MEDIUM · CONTAINED	Confirm both; apply opt-outs and bounces automatically.

FINDING 1

CRITICAL

46 emailed prospects are frozen

WHAT WE SAW

On 30 October, 46 prospects were emailed from the agency's mailbox, outside the outreach board's own sender. The board found all 46 in the Sent folder and parked each one as a suggestion, waiting for a person to confirm it. **Ten days later, none had been confirmed.**

EVIDENCE

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46 prospect records, each holding a detected send dated 30 October.
The sender's own rule refuses the next email to every one of them: "a send is detected and not yet confirmed — confirm it before the next touch."
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WHAT IT COSTS

- **46 businesses get no next email.** None of them can be sent another until someone confirms the last one.
- **28 of the 46 still showed as "new",** as if never contacted. The board's pipeline view was wrong by 28.
- It was also the batch the AI assistant could not identify on 8 November, when it noted that whatever ran that batch was prospecting the same pool it was. It was the board's own drafts.

THE FIX

Now, by hand: open the board's list of detected sends and confirm the 46.

Then, a system: apply a detected send automatically when it matched the board's own filed draft, in that draft's thread. It only records what the mailbox already proves happened, so it is the safe direction. Keep a person's confirm for replies, where judgement is real.

FINDING 2

HIGH

Two outreach systems that cannot see each other

WHAT WE SAW

	THE OUTREACH BOARD	THE AI ASSISTANT'S CAMPAIGN
Size	The full prospect list; 28 still marked "new" had in fact been emailed (finding 1)	15 prospects; 6 emailed on 8 November
On its own	Drafts emails by itself, and is switched on to find prospects, since 8 November	Sends behind its own send gate

They shared at least three businesses. One was a near miss: the board had already emailed it twice in late October. The assistant caught that only through a manual search of the mailbox, which it then made a required step before each wave.

EVIDENCE

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Businesses on both lists, matched by website: at least 3.
The sender's guard, "one touch per business per day", reads the board's records only. None of the six businesses the assistant emailed on 8 November was in them.
So once the board was finding prospects on its own, nothing would stop it drafting to a business the assistant had emailed the day before.
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WHAT IT COSTS

A second cold email to the same inbox reads as spam, and it goes out from the business's own email domain. Prospecting work is done twice. HOURS: ABSENT

THE FIX

One store of record. The assistant writes each send into the board's record, and reads the board before building a list, so a list is never built from scratch again.

FINDING 3

MEDIUM · CONTAINED

An opt-out left unapplied since 30 October

WHAT WE SAW

One business opted out on 30 October. Another's email bounced on 28 October. Both sat unconfirmed.

CONTAINED, CHECKED RATHER THAN ASSUMED

The sender re-checks each record before every send and refuses any record with a detection still pending. Neither business could be emailed.

WHY IT STILL MATTERS

Both records still read as live, and one said "new". Anything that reads the stage, from a count to the next tool, treats an opt-out as a fresh prospect.

THE FIX

Confirm both now. Then apply opt-outs and bounces automatically. It only ever stops contact, so it is the safe direction.

ALREADY AUTOMATED — KEEP IT

- **Reply, bounce and opt-out detection every 15 minutes.** It found all 46 sends, the opt-out and the bounce. It works; the gap was the confirm step after it.
- **The sender's pre-flight.** It re-reads the mailbox before each send, refuses to send blind, and halts the day on any opt-out.
- **Drafting on its own, and prospecting switched on,** since 8 November.
- **The AI assistant's daily check-ins,** and sends behind a gate that tells the owner first.
- **On the day, the one daily approval was a deliberate control,** the owner's own rule, and not a gap.

WHERE WE LOOKED AND FOUND NOTHING TO REPORT

An empty result is reported as empty

- **Client delivery.** Nothing in the records shows a manual bottleneck in the work for the agency's clients. That is an absence of evidence, not a clean bill.
- **By the time of the audit, the board had sent no email in November.** The cause was not found on the day. One explanation, that the unconfirmed opt-out halted every day, was checked and is false: the halt counts only that day's opt-outs.
- **Minutes per manual step.** ABSENT See "What was not measured".

AFTER THE AUDIT

The block in finding 1 was lifted the next day.

Ask for yours

Free, and yours to keep, whether or not you hire us. Tell us what the business does and where the manual work piles up.

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Every figure in this report comes from the agency's own records as they stood on 9 November 2026, and was checked again before this sample was published. Nothing in it is a projection. The businesses the agency was contacting are not named. elmtsystems.com