

Coastal AI Consultancy — Free AI Audit Template

30-Minute Discovery & Audit Framework For use by Michelle in all initial clinic consultations michelle@coastalaiconsultancy.com

Purpose of This Document

This template guides Michelle through every Free AI Audit call with a prospective clinic client. It ensures every call is structured, professional, and consistently leads to a personalised AI Roadmap being delivered within 48 hours.

The audit has three goals:

1. Understand the clinic's current situation and biggest pain points
2. Identify the highest-ROI AI opportunities specific to that clinic
3. Create urgency and confidence to move forward with a paid engagement

Call duration: 30 minutes **Follow-up:** Personalised AI Roadmap delivered within 48 hours

Pre-Call Preparation (5 minutes before the call)

Before joining the call, review the following about the prospect:

- Clinic name, type, and location
- Owner's name and title
- Clinic website — note any obvious gaps (no booking widget, no reviews section, etc.)
- Google reviews — note their current rating and total review count

- Instagram — note follower count and posting frequency
 - LinkedIn — note if they are active
 - Any previous email exchanges — note what they responded to
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Call Structure

Opening (2 minutes)

Warm welcome, brief introduction of yourself and Coastal AI. Set the agenda:

“Thank you so much for taking the time today. In the next 30 minutes, I’d love to learn a bit about your clinic, walk through a quick audit of where AI could make the biggest difference for you, and then I’ll put together a personalised roadmap and send it through within 48 hours. Does that sound good?”

Section 1: Clinic Overview (5 minutes)

Question	Notes
How long have you been operating?	
How many treatment rooms / practitioners do you have?	
What are your top 3 most popular treatments?	
What is your approximate average appointment value?	
Do you currently use any practice management software? (e.g., Zenoti, Jane, Mindbody)	
Approximately how many active patients are in your database?	

Section 2: Current Pain Points (8 minutes)

Listen carefully and let the prospect talk. Do not interrupt. Take notes on exact words they use — these will be reflected back in the roadmap.

Question	Notes
What is your biggest challenge right now when it comes to patient acquisition?	
How do you currently handle calls that come in after hours or when staff are busy?	
Do you have a sense of how many calls you miss per week?	
How do you currently follow up with patients who haven't visited in a while?	
How do you collect Google reviews? Is it a manual process?	
How are you currently marketing to your existing patient base?	
What does your no-show rate look like?	

Key pain points identified (circle all that apply):

- Missed after-hours calls
- Dormant patient database not being worked
- High no-show rate
- Low Google review count
- Generic / infrequent email marketing
- No online consultation / skin analysis tool
- Staff overwhelmed with admin tasks
- Other: _____

Section 3: AI Opportunity Assessment (10 minutes)

Based on the pain points identified, present the 2–3 most relevant AI solutions. Use the following talking points:

If missed calls are a pain point:

“The average clinic misses 62% of calls that come in outside business hours. Each one of those is a potential patient choosing your competitor instead. An AI voice agent answers every call, books the appointment, and sends a confirmation — all without any staff involvement. Most clinics recover 2–5 extra bookings per week from this alone.”

If dormant patients are a pain point:

“Most clinics are sitting on a gold mine they don’t realise they have. If you have [X] patients in your database and even 20% haven’t visited in 12 months, that’s [X] patients representing potentially [X × avg value] in recoverable revenue. AI reactivation campaigns typically bring back 15–20% of dormant patients within 30 days.”

If reviews are a pain point:

“84% of patients check Google reviews before booking. If you’re below 4.8 stars or have fewer than 50 reviews, you’re losing patients to competitors every single day. AI reputation management sends review requests at exactly the right moment — right after a positive appointment — and collects 47% more reviews than manual processes.”

Estimated ROI for this clinic:

AI System	Estimated Monthly Benefit	Monthly Cost	Monthly ROI
AI Voice Agent	[\$X]	\$350	[\$X]
Patient Reactivation	[\$X]	\$300	[\$X]
Reputation Management	Indirect (more bookings)	\$300	—
Total	[\$X]	[\$X]	[\$X]

Section 4: Close & Next Steps (5 minutes)

Summarise the key findings:

“Based on what you’ve shared, I can see [2–3 specific opportunities]. The biggest opportunity for your clinic right now is [#1 priority], and I think we could have that live within [timeframe].”

Present the next step:

“What I’d like to do is put together a personalised AI Roadmap for your clinic — specific tools, implementation timeline, and projected ROI — and send it through to

you within 48 hours. There's no obligation, and it's completely free. Would that be useful?"

If they express interest in moving forward:

"Wonderful. I'll send the roadmap through by [specific date/time]. In the meantime, is there anything else you'd like me to include or any specific questions you'd like me to address in the roadmap?"

If they are hesitant:

"I completely understand — it's a big decision. The roadmap will give you everything you need to make an informed choice, with no pressure. I'll send it through and we can reconnect after you've had a chance to review it."

Post-Call Actions (within 2 hours)

- Send a personalised thank-you email referencing 2–3 specific things discussed on the call
- Attach the Coastal AI Pitch Deck to the follow-up email
- Begin drafting the personalised AI Roadmap
- Set a calendar reminder to follow up in 48 hours with the completed roadmap
- Update your lead tracking spreadsheet with call notes and next action

Personalised AI Roadmap Structure

The roadmap delivered within 48 hours should include:

1. **Clinic Overview** — brief summary of the clinic and what was discussed
2. **Top 3 AI Opportunities** — specific to their pain points, with tool recommendations
3. **90-Day Implementation Timeline** — what gets set up when

4. **Projected ROI** — estimated monthly and annual return based on their specific numbers
 5. **Recommended Package** — which Coastal AI package is the best fit and why
 6. **Next Steps** — clear call to action with a link to sign up or book a follow-up call
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