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INTAKE · AI & AUTOMATION DIAGNOSTIC

Tell us about your business

This takes about 15 minutes. Rough answers are perfectly fine: we confirm the details together on our call. Your answers help us test the right channels and build an estimate around your real numbers.

Private and confidential. We use your answers only to prepare your diagnostic, and we never share them.

A About your business

01 Business name

02 Website

03 Your name, role and best email or phone

04 Country, city and the area you serve

05 Business hours and time zone

06 What do you sell, and who are your typical customers?

Your main services or products, and the kind of customer you serve most.

07 How many people work in the business?

○ Just me ○ 2–5 ○ 6–20 ○ 21–50 ○ More than 50

B How new inquiries reach you

08 Where do new inquiries come from?

Tick all that apply.

☐ Phone calls ☐ Web forms ☐ Website chat ☐ Email ☐ Text messages ☐ WhatsApp

☐ Facebook or Instagram messages ☐ Google or map listing ☐ Directories or marketplaces ☐ Walk-ins ☐ Other

09 Roughly how many new inquiries do you get a month?

All channels together. A rough number is fine.

10 Which channel brings the most inquiries?

11 When are you busiest?

Days and times when inquiries pile up.

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C Replies and follow-up today

12 Who answers new inquiries?

Names or roles.

13 About what share of inquiries are missed or answered late?

Your best guess, as a percentage.

14 How quickly does a new inquiry usually get its first reply?

◯ Within 5 minutes ◯ Within an hour ◯ Same day ◯ Next day or later ◯ Not sure

15 What happens to calls you can't answer?

◯ Voicemail ◯ Forwarded to a mobile ◯ Answering service ◯ Nothing is set up ◯ Not sure

16 What happens with inquiries that arrive after hours or at weekends?

17 How do you follow up with people who don't book or reply?

D Booking and sales

18 How do customers book or buy?

Tick all that apply.

☐ Online booking ☐ By phone ☐ Quote or estimate first ☐ Walk-in ☐ Other

19 Out of every 10 inquiries you talk to, how many become customers?

20 What does a typical new customer spend with you (USD)?

21 If you send quotes or estimates, how do you follow up on them?

22 How often do people miss appointments or cancel late?

◯ Rarely ◯ A few times a month ◯ Every week ◯ Not applicable

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E Tools and team time

23 Which tools do you use today?

Tick all that apply, and name them below if you can.

☐ CRM ☐ Booking calendar ☐ Spreadsheets ☐ Email marketing ☐ Phone system ☐ Website builder

☐ Invoicing or accounting ☐ Other

24 Tool names, and where your customer contacts are kept

25 Is anything already automated?

For example, auto-replies, reminders or review requests.

26 Hours a week your team spends on manual follow-up and admin

Calling back, re-typing details, scheduling, reminders, quotes.

27 What is that time worth per hour (USD)?

Wages plus overhead, or what your own hour is worth.

28 Which three repetitive tasks would you most like to stop doing by hand?

F Customers and reviews

29 About how many past customers or old leads are in your records?

30 How do you ask for reviews today?

◯ We don't yet ◯ Sometimes, by hand ◯ Automatically ◯ Not sure

31 Do you reply to online reviews?

◯ Always ◯ Sometimes ◯ Rarely ◯ Not yet

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G Your goals

32 What matters most right now?

Pick one.

- ○ More inquiries
- ○ Faster replies
- ○ More bookings from the inquiries we get
- ○ Less admin
- ○ More and better reviews
- ○ Winning back past customers

33 What would a great next six months look like for your business?

34 Which languages do your customers use?

35 Anything we should be careful about?

Your brand voice, industry rules, or topics to avoid.

H Response check (with your permission)

36 Which channels may we test with a sample inquiry?

We send a short, clearly harmless inquiry and time the reply. Nothing is booked or bought.

- ☐ Phone call
- ☐ Web form
- ☐ Website chat
- ☐ Email
- ☐ Social message
- ☐ Please don't test

37 Anything we should know before we test?

For example, who to let know, or times to avoid.

Thank you. Send your answers back to admin@niivex.com, or bring them to our call. We'll confirm a time for your diagnostic call and, if you approved a response check, when it will run.