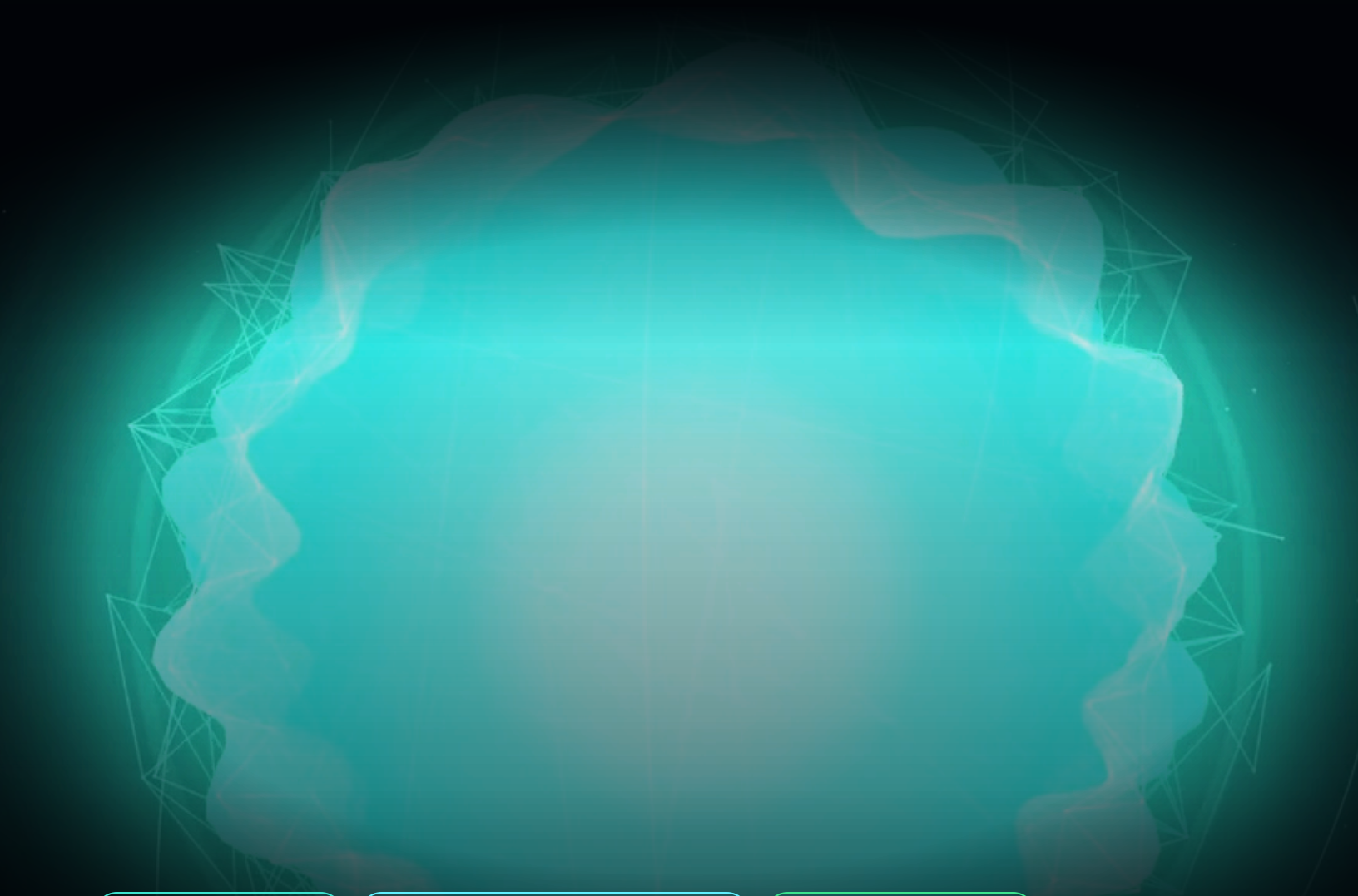
AURELIUS™

FREE · ABOUT 7 MINUTES · FOR OWNERS AND OPERATORS

Owner Operating Load & Cost Scorecard

Find where leads and follow-up fall through, what you pay people, providers and tools to do, how much coordination still runs through you — and which Aurelius™ path would be the natural place to start.



MAKE MORE MONEY | CONSOLIDATE OPERATING COSTS | BUY BACK YOUR TIME

How to use: circle one answer per question (each answer carries the small score shown), fill in your current stack, then total each part on page 4. Directional only — not a savings estimate or guarantee.

PART 1 · MAKE MORE MONEY

Where leads and follow-up fall through

01 How fast does a new lead usually get a first response?

- ◯ Within minutes 0
- ◯ Within the hour 1
- ◯ Same day 2
- ◯ Next day or later 3

02 How many follow-up touches does a typical lead get before it goes quiet?

- ◯ 6 or more 0
- ◯ 3–5 1
- ◯ 1–2 2
- ◯ Depends who remembers 3

03 When a lead goes quiet, does anyone systematically re-engage it?

- ◯ Always 0
- ◯ Sometimes 1
- ◯ Rarely 2
- ◯ Never 3

04 What happens to calls and inquiries after hours or at weekends?

- ◯ Answered 24/7 0
- ◯ Returned next working day 1
- ◯ Often missed 2
- ◯ We don’t know 3

05 How often do proposals or estimates go out without a planned follow-up?

- ◯ Rarely 0
- ◯ Sometimes 1
- ◯ Often 2
- ◯ We don’t track it 3

Part 1 total (0–15) _____

PART 2 · CONSOLIDATE OPERATING COSTS

What you pay people, providers and tools to do

06 How many separate providers, contractors and tools do you coordinate?

- ◯ 1–3 0
- ◯ 4–6 1
- ◯ 7–10 2
- ◯ 11 or more 3

07 Do they share one view of your customers and the business?

- ◯ Yes 0
- ◯ Partly 1
- ◯ Mostly not 2
- ◯ No 3

08 Your current stack — monthly cost

SEO / GEO + content	$ _____ /mo	Google Ads management	$ _____ /mo
Sales / prospecting	$ _____ /mo	Marketing / creative / campaign management	$ _____ /mo
Website / social / digital support	$ _____ /mo	Bookkeeping / financial reporting	$ _____ /mo
Operations / project coordination	$ _____ /mo	Software / CRM / AI tools	$ _____ /mo
Fractional CFO / finance leadership	$ _____ /mo	Outsourced SDR / appointment setting	$ _____ /mo

OPTIONAL · OTHER SERVICES

Fractional COO $ _____	Fractional CMO $ _____	Fractional AI leadership $ _____
RevOps $ _____	AI automation / consulting $ _____	Other $ _____

Your real current monthly stack (add every line) $ _____ /mo

Reference: illustrative fragmented operating stack $35,500–$45,500/mo vs Aurelius™ Managed AI Operations — Annual $9,000/mo. Illustrative example — not a guaranteed savings claim.

Part 2 total — Q6 + Q7, plus 1 if your stack is $10,000–$19,999/mo, or 2 if $20,000+/mo (0–8) _____

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PART 3 · BUY BACK YOUR TIME

Owner coordination, recurring work and decision bottlenecks

09 Roughly how many hours a week do you spend coordinating people, providers and follow-up?

Owner coordination _____ hrs/wk

10 Which recurring operating work still sits on you? (tick all that apply — 1 point each, max 3)

- ☐ Following up leads
- ☐ Chasing agencies / contractors
- ☐ Checking campaign results
- ☐ Answering routine customer questions
- ☐ Pulling project status
- ☐ Keeping financial work moving
- ☐ Finding what slipped
- ☐ Remembering what needs follow-up

11 How often does work wait on you because only you have the context?

- ○ Rarely 0
- ○ Weekly 1
- ○ Several times a week 2
- ○ Daily 3

12 If you were away for two weeks, what would happen?

- ○ It runs fine 0
- ○ Minor slips 1
- ○ Significant slips 2
- ○ Things stall 3

Part 3 total — Q11 + Q12 + Q10 points, plus 1 if 10–19 hrs/wk, or 2 if 20+ (0–11) _____

PART 4 · WHERE AURELIUS™ COULD HELP

Work Aurelius™ could perform or coordinate

13 Which work would you most want off your plate? (tick all that apply)

- ☐ Prospecting & research
- ☐ Outbound email
- ☐ AI calling
- ☐ Follow-up & qualification
- ☐ Appointment workflow
- ☐ Proposal progression
- ☐ SEO / GEO
- ☐ Google Ads
- ☐ Marketing
- ☐ Website agent / 24/7 coverage
- ☐ Customer service
- ☐ Bookkeeping
- ☐ Financial reporting
- ☐ Projects & operations

14 Who would you want running Aurelius™ day to day?

- ○ Start with revenue — work our leads with us
- ○ Our own team, company-wide
- ○ Operated for us, alongside our team
- ○ Not sure yet

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YOUR RESULTS

Where work, revenue and owner time may be leaking.

PART	YOUR TOTAL	LOW	MODERATE	HIGH
1 · Revenue follow-through	_____	0–4	5–9	10–15
2 · Cost fragmentation	_____	0–2	3–5	6–8
3 · Owner load	_____	0–3	4–7	8–11

LIKELY STARTING PATH

Growth Engine

WE OPERATE THE REVENUE ENGINE WITH YOU.

Most points in Part 1, and most Q13 ticks are revenue work (prospecting, email, calling, follow-up, appointment workflow, proposals).

Business OS

AURELIUS™ IS BUILT AROUND THE WHOLE COMPANY. YOUR TEAM RUNS DAY-TO-DAY OPERATIONS USING IT.

Points spread across Parts 1–3, ticks across more than one area, and you'd like your own team to run it.

Managed AI Operations

WE ACTIVELY OPERATE AGREED FUNCTIONS ALONGSIDE YOU.

High Part 2 and Part 3 scores, a larger current stack, and you'd like the operating work run for you.

Your Q14 answer usually decides the path. Directional only — not a savings estimate, ROI forecast or guarantee. Your written proposal confirms scope, the capabilities included and pricing (meetaurelius.com/pricing).

NEXT STEP

Bring this scorecard to an Aurelius™ Working Session.

We'll put your real numbers side by side with the Aurelius™ paths and map where Aurelius™ could make more money, consolidate operating cost and buy back your time — with you in control.

BOOK AN AURELIUS™ WORKING SESSION

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