

★ AUTOMATESCALE · BY ADAM PALMER

★ EDITION 2026 · FREE

The 9-Step AI Funnel Audit we run on \$10M+ client sites.

The same internal diagnostic we use during the first 7 days of every Growth and Scale engagement — refined across 286 deployments and 2,036 funnel projects.

★ 286+ DEPLOYMENTS

12,400+ READERS

★ 4.9 · 1,800 REVIEWS

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WHY THIS PDF EXISTS

Most "funnel audits" are sales pitches. This one isn't.

If you've ever booked a "free funnel audit" with an agency, you know the pattern. They spend 15 minutes telling you what's broken, then 45 minutes pitching themselves. The actual audit gets buried under the pitch.

This document is the opposite. It's the same 9-step checklist we run internally during the first 7 days of every paid AutomateScale engagement — the structured diagnostic that surfaces the leak points before we touch a line of code.

You get the audit. You don't get the pitch.

How to use it

Each of the 9 checks has three parts: **a scoring rubric (A–F)**, **a diagnostic question** that surfaces whether you pass or fail, and **a documented fix pattern** with example copy from real engagements. Work through them in order. The first three are above-the-fold leaks; checks 4–6 cover the conversion middle; checks 7–9 cover the long-cycle compounding layer.

Who this is for

Operators running their own funnels who want a reusable internal audit. Buyers evaluating agencies. Other agencies who want to raise the floor of their own diagnostic. We don't mind — the methodology being widely-shared is good for the category.

What you don't get

A nurture sequence. A sales call gate. A retargeting pixel. You give us your email, we send you this PDF, and you get one follow-up confirming delivery. After that, only The Scale Brief newsletter (every Sunday, one-click unsubscribe). That's the entire transaction.

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The 9 audit checks.

Ranked roughly by where they sit in the funnel — above-fold, middle, long-cycle.

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★ CHECK ONE

01

Hero clarity test.

Does your headline name **the avatar**, **the outcome**, and **the timeframe** in fewer than six seconds of reading?

Scoring rubric

A

B

C

D

F

A: Avatar + outcome + timeframe explicit. **B:** Two of three. **C:** One of three. **D:** Generic benefit ("grow your business"). **F:** Founder-centric ("we help businesses scale").

DIAGNOSTIC QUESTION

Read your hero out loud in 6 seconds. Could a cold visitor name who you serve, what they get, and when?

Why most fail

Founders write hero copy for themselves. "Industry-leading platform for ambitious growth" tells the visitor nothing about whether they're the avatar or what they walk away with. The fix is brutal: cut everything that isn't avatar + outcome + timeframe.

DOCUMENTED FIX · PATTERN

Before: "Grow your business with AI-powered marketing."

After: "SaaS founders at \$1M ARR: launch your first AI-agent funnel in 11 days."

The fix names the avatar (SaaS founders at \$1M ARR), the outcome (AI-agent funnel), and the timeframe (11 days). It loses 60% of cold traffic on purpose — that traffic was never going to convert anyway.

What it looks like across verticals

- **SaaS:** "B2B SaaS at \$1M ARR: cut CAC 40% with agent-driven onboarding in 60 days."
- **Agency:** "Agency owners doing \$50K/mo: install the white-label client portal that closes 30% of trials in 7 days."
- **Coaching:** "High-ticket coaches at \$20K/mo: replace 80% of your discovery calls with an AI qualifier in 14 days."
- **DTC:** "DTC brands at \$100K MRR: deploy the post-purchase agent that lifts AOV 22% in 30 days."

What about long headlines?

Long is fine. Specific is what matters. A 22-word headline that names the avatar and outcome converts higher than a snappy 6-word headline that names neither. Don't optimize for elegance — optimize for self-selection.

The ICE score for this fix

9

IMPACT

10

CONFIDENCE

10

EASE

ICE: 900 — highest in this PDF. Single 20-minute change. Touch nothing else first.

★ CHECK TWO

02

CTA specificity.

Does your above-fold CTA name **what the visitor gets** and **when**? Or does it say "Get Started," "Learn More," or "Book a Call"?

Scoring rubric

A

B

C

D

F

A: CTA names deliverable + timeframe. **B:** Names deliverable only. **C:** Action verb + outcome. **D:** Generic action ("Get Started"). **F:** "Submit" or "Click here."

DIAGNOSTIC QUESTION

Replace your CTA copy with "Get my [X] in [Y]." Did your hero get more compelling, or did it not work because you don't know what X and Y are?

The pattern

"Book a call" puts the cost (a calendar slot, a sales pitch) before the benefit. "Get my audit in 24 hours" puts the benefit (an audit, a fast turnaround) before the cost. The conversion delta is consistently 1.4x–2.1x across our 286 deployments.

DOCUMENTED FIX · PATTERN

Before: "Get Started" → 1.8% click-through to next step.

After: "Get my \$7K AI funnel built in 11 days" → 4.2% click-through.

Specificity is friction-reducing, not friction-adding. Visitors are scared of vague commitments. They are not scared of specific deliverables with timeframes.

Below-the-fold CTAs

Apply the same rule for secondary CTAs. "Learn more" loses to "See the 30-second demo." "Schedule a demo" loses to "Get my custom audit in 24h." The wording matters as much as the placement.

Anti-pattern: too many CTAs

If you have 3+ different CTAs above the fold (book a call, download the guide, watch the video, get the audit), visitors pick "none of the above." Pick one primary CTA, one secondary, archive the rest below the fold.

Test order

1. Replace the verb (Get → Get my)
2. Add the deliverable noun
3. Add the timeframe
4. Confirm friction-reducing trust signal directly below

The ICE score for this fix

8

IMPACT

9

CONFIDENCE

10

EASE

ICE: 720 — second highest. Ship this same afternoon you ship Check 01.

★ CHECK THREE

03

Proof density.

Above the fold: **specific numbers, named clients, recent dates**. Generic claims ("trusted by hundreds") kill credibility. The PDF audits the density.

Scoring rubric

A

B

C

D

F

A: 3+ named clients, dated outcomes, specific \$ figures above fold. **B:** 2 of 3. **C:** Logos only. **D:** "Trusted by hundreds." **F:** No proof above fold.

DIAGNOSTIC QUESTION

Without scrolling, can a cold visitor name three of your specific clients, one quantified outcome, and a year more recent than 2023?

Why this matters more in 2026

AI-generated landing pages are everywhere. The cost of producing slick-looking copy collapsed to zero. The only remaining cost is verifiable specificity. Named clients + dated outcomes + specific dollar amounts can't be faked at scale — and visitors now actively look for them as signal that you exist.

DOCUMENTED FIX · PATTERN

Before: "Trusted by hundreds of operators worldwide."

After: "★ 286+ client deployments · 2,036 projects shipped · Neil Patel, Chad Mureta, Tom Hegna, 282 others."

The fix is mostly transcription. You probably have the data; it's hidden in your case-studies page or a Notion doc. Move the specifics above the fold where they actually convert.

The "wall of receipts" layout

The highest-density proof layout we deploy: a single section, 9–12 testimonial cards in a 3-column grid, each card has the headshot, the name, the specific outcome quantified, and a date. No long quotes — short ones. Visitors scan for pattern density, not narrative depth.

Anti-pattern: anonymized proof

"A SaaS founder said..." is worse than no testimonial. If the client won't be named, don't use the quote — or contact them and ask permission. In 2026, anonymized proof reads as fabricated.

The ICE score for this fix

9

IMPACT

8

CONFIDENCE

7

EASE

ICE: 504 — high but slower than checks 01/02 because you have to source the receipts.

★ CHECK FOUR

04

Qualification gates.

Are tire-kickers **filtered before** they hit your calendar? If everyone books, your sales calls are unprofitable. Three structural fixes documented below.

Scoring rubric

A

B

C

D

F

A: Multi-step form, MRR field, automatic scoring, route on threshold. **B:** Form has MRR/budget. **C:** Form has industry only. **D:** Single email field. **F:** "Book a call" button straight to Calendly.

DIAGNOSTIC QUESTION

What percentage of last quarter's sales calls converted to closed deals? If under 25%, your qualification gates are too low.

The three structural fixes

1. Capture MRR/revenue tier in the form. Single dropdown (\$0-10K, \$10-50K, \$50K+, \$250K+). Route differently per tier. **2. Add 2–3 case-study reference fields** ("Closest case study below to your situation?"). Forces the visitor to commit narrative-fit. **3. Add a \$99 paid intake fee or a content-application requirement** (link to a 90-second Loom intro). Eliminates 80% of low-intent traffic.

DOCUMENTED FIX · PATTERN

A client running \$40K/mo on a "Book a Call" funnel switched to a 6-question application form with revenue-tier routing. Volume dropped 70%. Closed-deal rate per call went from 11% to 47%. Net new revenue: +\$22K/mo despite fewer calls.

What to route on

- **Tier 1 (high-fit):** Direct to Adam's calendar (or your top closer). Bypass intake.
- **Tier 2 (mid-fit):** Long-form follow-up sequence + lower-touch closer.
- **Tier 3 (low-fit):** Self-serve content path. No human call. Newsletter only.
- **Tier 4 (no-fit):** Polite decline + recommendation to a partner if applicable.

The hidden ROI

Calendar time is your most expensive non-fungible resource. If you're a \$20K/mo coach, your calendar slot is worth ~\$300 marginal revenue. A 30-min low-fit call costs you \$300 in expected value plus the opportunity cost of the next high-fit call you turned away. Qualification gates are an ROI problem, not a vanity problem.

The ICE score for this fix

9

IMPACT

8

CONFIDENCE

8

EASE

ICE: 576 — high. Build over 2-3 days; ROI shows up in week 2.

★ CHECK FIVE

05

Follow-up windows.

First-touch **under 5 minutes**, second **under 24 hours**, third **under 72 hours**. Most operators miss touches 2 and 3 — and lose 53% of qualified intent in those gaps.

Scoring rubric

A

B

C

D

F

A: Touches 1-3 hit windows, multi-channel (email + SMS + voice). **B:** All 3 touches hit, email only. **C:** Touches 1-2 hit. **D:** First touch only. **F:** No first-touch under 1 hour.

DIAGNOSTIC QUESTION

Submit a fake lead through your own funnel. How fast does the first email arrive? Is there a second touch within 24 hours? A third within 72?

Why under 5 minutes matters

Inbound intent decays exponentially. A lead who submits a form is in a buying mindset for ~3–7 minutes on average. After 5 minutes, they've context-switched. After an hour, they've moved on. After 24 hours, they've researched your competitors. First-touch under 5 minutes — even just an automated acknowledgment — preserves the intent window.

DOCUMENTED FIX · PATTERN

Webhook from form → instant transactional email (under 60 seconds) → SMS 5 min later if SMS opt-in → personalized email 24 hours later from owner → second SMS 72 hours later with calendar link. Five touches in three days, all automated, all named-from-human.

Multi-channel beats high-volume single-channel

One email + one SMS in 24 hours converts higher than four emails in 24 hours. Channel diversity beats volume because email inboxes are saturated and SMS is still novel as a B2B follow-up channel (for now).

Stop sending "just checking in"

Every touch must add new value: a case study, a relevant blog post, an offer to answer specific questions, a calendar link. "Just checking in" is a tell — the prospect knows you have nothing new and are ping-ponging out of obligation. It hurts close rate.

The ICE score for this fix

9

IMPACT

9

CONFIDENCE

7

EASE

ICE: 567 — high. 1-2 days of wiring, immediate uplift.

★ CHECK SIX

06

Agent layer presence.

Are RAG-powered agents **actually running**, or is your "automation" a human in Slack pretending? Three diagnostic questions reveal the truth.

Scoring rubric

A

B

C

D

F

A: 3+ agents in production, each with audit log + escalation path. **B:** 1-2 agents in production. **C:** Agents in beta. **D:** Drip-only automation. **F:** No automation layer.

DIAGNOSTIC QUESTION

Pick three customer interactions from this week. For each: which agent ran it? What was the agent's audit log? When did the agent escalate to a human?

What a real agent layer looks like

At least three named agents: an **Email Nurturer** (context-aware reply chains), a **Booking Qualifier** (scores incoming leads, routes), a **Retention Watcher** (monitors usage signal, fires save sequences). Each has structured inputs/outputs, an audit log, a confidence threshold, and a defined escalation path when confidence drops.

DOCUMENTED FIX · PATTERN

The standard Scale System™ agent layer includes 8 named agents on a per-task routing layer (Claude for high-judgment, OpenAI for structured+embedding, Gemini for long-context, Mistral/Gemini Nano for cheap classification). Each agent's outputs land back on the canonical contact record in GoHighLevel, with full provenance.

Beware of "agent" theater

Many tools market themselves as "AI agents" when they're actually if-this-then-that rule engines.

Three tests: (1) Can the agent handle inputs it wasn't explicitly programmed for? (2) Does it call tools or just template responses? (3) When confidence drops, what happens? If the answer to any of these is "no" or "nothing," it's not an agent — it's a workflow.

Build vs. buy

For most operators under \$5M ARR, the right call is to build agents on a routing layer (n8n + Claude/OpenAI/Gemini) rather than buy a vertical agent platform. Vertical platforms are faster to deploy but lose the per-task routing economics over 18 months.

The ICE score for this fix

10

IMPACT

7

CONFIDENCE

5

EASE

ICE: 350 — high impact, lower ease. Build over weeks not days.

★ CHECK SEVEN

07

Attribution depth.

Can you **trace any closed deal** back to the touchpoint that moved it? If not, you're optimizing blind. The data structure to fix this is documented below.

Scoring rubric

A

B

C

D

F

A: Per-touchpoint attribution with multi-touch model. **B:** First + last touch captured. **C:** First touch only. **D:** UTMs in CRM, not used in reporting. **F:** No attribution captured.

DIAGNOSTIC QUESTION

Pick last month's biggest closed deal. List every interaction with that contact: ad clicks, form fills, emails opened, calls booked, pages viewed. Can you?

The minimum viable attribution schema

Every contact gets a `touchpoints[]` array on their canonical record. Each touchpoint logs: source (ad/email/page/call), timestamp, content (which page/ad/email), and the state-change it triggered (none/lead/qualified/booked/closed). Run a simple weighted-attribution model on this schema and you instantly know which channels close.

DOCUMENTED FIX · PATTERN

Single GoHighLevel custom-field group on every contact record: `source_channel`, `source_ad`, `source_page`, `source_referral`, `source_first_touch_date`. UTMs from every form. Then build a sheet that joins contacts to closed-deals and weights by recency. Less than a day of work.

Stop using GA for revenue attribution

Google Analytics gives you traffic attribution. It does not give you revenue attribution because it doesn't know which sessions closed deals. Attribution must live on the canonical contact record (CRM) and be joined to closed-deal data, not modeled in your traffic tool.

The leverage

Operators with deep attribution typically cut ad spend by 30-50% within 90 days because they stop spending on channels that look good in GA but never close. The savings are immediate. The reallocation to high-closing channels compounds for 18+ months.

The ICE score for this fix

10

IMPACT

8

CONFIDENCE

7

EASE

ICE: 560 — high. Schema fix is one day; the ad-spend reallocation pays back fast.

★ CHECK EIGHT

08

Retention infrastructure.

Is there a **churn-detection layer**? Most funnels die on the back end, not the front. The leading indicators to watch are documented below.

Scoring rubric

A

B

C

D

F

A: Retention agent monitors 4+ leading indicators, fires save-sequences. **B:** Monitors 2 indicators. **C:** Monitors payment-failure only. **D:** Manual review weekly. **F:** Find out when cancellation happens.

DIAGNOSTIC QUESTION

Of your last 10 churned customers, how many showed a leading indicator (usage drop, support spike, login lapse, payment delay) at least 14 days before they cancelled?

The four leading indicators

- **Usage decay:** Login frequency drops >40% week-over-week.
- **Support spike:** 2+ tickets in 7 days, particularly negative-sentiment.
- **Payment friction:** Card decline, invoice unpaid >3 days, billing-page visits.
- **Engagement drop:** Email opens fall to zero for 14 days after previously engaged.

DOCUMENTED FIX · PATTERN

Build a Retention Watcher agent that runs daily, checks the four indicators on every active customer, and fires a save-sequence (case study + free month offer + scheduled call) at the first trigger. Recovers 20-30% of would-be churn — typically a 6-figure annual win for any SaaS >\$1M ARR.

Retention beats acquisition every time

A 1-point reduction in monthly churn rate compounds to 12 points of annual LTV. A 1-point improvement in acquisition conversion compounds to 1 point of revenue. The leverage gap is 10x, but operators allocate maybe 5% of their effort to retention infrastructure. The math is obvious; the discipline is rare.

Anti-pattern: exit surveys

By the time the customer fills the exit survey, you've lost them. The intervention has to happen weeks earlier — at the first leading indicator, not at cancellation. Exit surveys are good for post-mortem analysis. They are not a retention strategy.

The ICE score for this fix

10

IMPACT

8

CONFIDENCE

6

EASE

ICE: 480 — high. Pays back over 60-90 days but compounds for years.

★ CHECK NINE

09

ICE prioritization.

Impact × Confidence × Ease. The framework for deciding what to fix first. Stop fixing the easy stuff. Fix the high-leverage stuff.

Scoring rubric

A

B

C

D

F

A: Every fix has an ICE score, you ship highest first. **B:** You have a list with rough priority. **C:** You have a list. **D:** You have a Notion doc somewhere. **F:** You ship whatever annoys you most this week.

DIAGNOSTIC QUESTION

List the next 5 fixes on your funnel roadmap. Score each (1-10) on Impact, Confidence, Ease. Multiply. Are you shipping the highest-product first? Or the easiest one?

How to score

- **Impact:** If this works, what % lift do I expect? 1=trivial, 10=transformational.
- **Confidence:** How sure am I this will work? 1=guesstimate, 10=already proven in our deployment data.
- **Ease:** How fast can I ship it? 1=quarter-long project, 10=this afternoon.

DOCUMENTED FIX · PATTERN

From this PDF's audit checks: Check 01 (Hero clarity) scores $9 \times 10 \times 10 = 900$. Check 06 (Agent layer) scores $10 \times 7 \times 5 = 350$. Both are high-impact; the order should clearly be Hero clarity first, Agent layer last. ICE forces this honesty.

The bias ICE corrects

Operators tend to over-score Ease (because builders like building) and under-score Impact (because nobody is sure). Multiplying surfaces this bias. The high-Ease/low-Impact projects fall to the bottom where they belong; the high-Impact/lower-Ease projects float to the top where they earn their keep.

What to do with the ranked list

1. Ship the top 3 ICE items, all of them, this quarter — even if items 4-10 stay untouched.
2. Re-score everything every 4 weeks. Impact estimates shift as you learn.
3. Kill items that fall below ICE 200 unless they're compliance/legal blockers.
4. Don't ship items rated below ICE 100 unless they're free (under 30 min).

The ICE score for this fix

7

IMPACT

9

CONFIDENCE

10

EASE

ICE: 630 — high. Adopting ICE doesn't fix your funnel, but it makes every subsequent fix higher-leverage.

SAMPLE FINDING FROM A REAL ENGAGEMENT

What a real audit output looks like.

Below: an anonymized audit summary from a SaaS client's pre-AutomateScale state. Every grade is real; the company name is the only redaction.

Client: SaaS · Language Learning · Pre-engagement
Date: 2023-Q4 · Diagnostic phase
Reviewer: Adam Palmer

SCORECARD

[A] Check 01 · Hero clarity test	→ Strong
[C] Check 02 · CTA specificity	→ Generic "Get Started"
[F] Check 03 · Proof density	→ Zero named clients
[C] Check 04 · Qualification gates	→ Form length OK, scoring missing
[F] Check 05 · Follow-up windows	→ Median 4h to first-touch
[F] Check 06 · Agent layer presence	→ None. Drip only.
[F] Check 07 · Attribution depth	→ Last-touch only via GA
[F] Check 08 · Retention infrastructure	→ No churn signal monitoring
[B] Check 09 · ICE prioritization	→ They had a list, no scoring

HIGHEST-ICE FIXES (ranked):

1. **Deploy Email Nurturer agent** (ICE: $9 \times 9 \times 7 = 567$)
2. **Add ICP scoring to capture form** (ICE: $9 \times 8 \times 8 = 576$)
3. **Build Retention Agent layer** (ICE: $10 \times 8 \times 6 = 480$)

OUTCOME @ 14 months:

trial-to-paid 12% → 38%

ARR \$0 → \$1.4M

CAC payback 14mo → 4mo

see: automatescale.com/case-studies/learn-hungarian-fast

★ THE NEXT STEP

You've got the audit. Want the engagement?

If running this audit on your own funnel surfaces 3+ checks rated D or F, you're a fit for The Scale System™ — our 11-21 day Growth or Scale engagement. Adam personally architects every build. Five client slots per quarter.

★ APPLY FOR Q3 2026

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48-hour response. Honest fit-assessment, not a sales call.

★ THE SCALE BRIEF NEWSLETTER

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One short brief every Sunday. The same patterns that built this PDF, applied to a new problem each week.

★ THREE CASE STUDIES REFERENCED HERE

Learn Hungarian Fast · Boss-Ish · Cruzen Outdoor

Full breakdowns at automatescale.com/case-studies — including the pre-engagement diagnostic for each.

Built by

Adam Palmer

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★ 286+ client deployments

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