

BUSINESS ASSESSMENT

Prepared for SAN FRANCISCO ART EXCHANGE

ASSESSMENT DATE

07/02/2026

BUSINESS TYPE

Art Gallery

PRIMARY FOCUS

Reclaim Time

THE BOTTOM LINE

FINANCIAL IMPACT

MONTHLY NET ROI

\$2,800/mo

≈ \$33,600/year in reclaimed time

WEEKLY TIME RETURNED

6 hrs/week

\$720/week value at \$120/hr

TOTAL MONTHLY TOOL COST

\$80/mo

Combined cost of all 5 tools

EXECUTIVE SUMMARY

THE PAIN

The gallery runs on Diane's personal inbox and a set of spreadsheets. Collector and artist emails — pricing requests, availability questions, consignment updates — pile up faster than the team can answer them, and the most valuable messages get buried under newsletters and admin noise. Writing artwork descriptions, artist statements, and exhibition wall text by hand eats several hours every week.

THE OUTCOME

Roughly 6 hours per week reclaimed across email triage, collector follow-up, and content writing — time redirected to sales conversations, artist relationships, and exhibitions.

6

Hours you can reclaim every week

PRIMARY FOCUS

RECLAIM TIME

WHERE THE VALUE IS

IMPACT-EFFORT MATRIX

HIGH IMPACT

QUICK WINS

- 1 Buried collector email → SaneBox
- 2 Unrecorded calls & visits → Fathom
- 3 Manual artwork copy → Claude
- 4 Manual announcements → Flodesk
- 5 Scheduling back-and-forth → Calendly
- 6 Repetitive buyer FAQs → Claude prompts

High impact, low effort — this report focuses here.

MAJOR PROJECTS

- 1 Collector CRM setup
- 2 Speed-to-lead AI agent
- 3 Inventory & provenance knowledge system

High impact, high effort — phase these in after the wins.

LOW IMPACT

FILL-INS

- 1 Auto social captions for new arrivals
- 2 Digital sign-in / guestbook
- 3 Templated thank-you notes

Low impact, low effort — do them when time allows.

IGNORE THESE

- 1 Custom gallery mobile app
- 2 Full website rebuild
- 3 From-scratch AI chatbot

Low impact, high effort — not worth the time now.

LOW EFFORT

HIGH EFFORT

HIGH IMPACT, LOW EFFORT

QUICK WINS

- | | | |
|----|---|--------------------------|
| 01 | Non-urgent email burying important collector inquiries | → SaneBox |
| 02 | No record of what's said on collector calls and studio visits | → Fathom |
| 03 | Hours spent writing artwork descriptions, artist bios & wall text | → Claude |
| 04 | Collector announcements and new-work emails sent manually | → Flodesk |
| 05 | Endless back-and-forth scheduling private viewings | → Calendly |
| 06 | Same buyer FAQs answered from scratch every time | → Claude (saved prompts) |

RECOMMENDED SOLUTIONS

01 SANEBOX

Automatically sorts non-urgent mail into a secondary folder so the team sees what matters first.

COST	\$7/mo
SETUP	Easy (~15 min)
SAVES	~1.5 hrs/week

02 FATHOM

Auto-records, transcribes, and summarizes video calls so nothing gets forgotten and follow-ups write themselves.

COST	Free
SETUP	Easy
SAVES	~1 hr/week

03 CLAUDE

Drafts gallery-quality copy in the house voice from a few notes; also answers repetitive buyer FAQs.

COST	\$20/mo
SETUP	Easy-Medium
SAVES	~2 hrs/week

04 FLODESK

Beautiful, reusable email templates for exhibition invites and new-arrival alerts to the collector list.

COST	~\$38/mo
SETUP	Medium
SAVES	~1 hr/week

05 CALENDLY

A single booking link handles scheduling; drop it in the email signature and on the site.

COST	~\$12/mo
SETUP	Easy
SAVES	~0.5 hr/week

START THIS WEEK

YOUR 4-DAY QUICK WINS PLAN

1

DAY ONE

Sign up for SaneBox and connect the gallery inbox — let it start sorting automatically.

TOOL · **SANEBOX**

2

DAY TWO

Install Fathom, connect it to Google Meet/Zoom, and record the next collector or artist call.

TOOL · **FATHOM**

3

DAY THREE

Set up Claude and use the provided prompt to draft descriptions for three current works.

TOOL · **CLAUDE**

4

DAY FOUR

Create a Calendly link for private viewings and add it to the email signature and website.

TOOL · **CALENDLY**

WHAT COMES AFTER QUICK WINS

01

Collector CRM Setup. Move collector history, purchase records, and follow-ups out of spreadsheets into a proper CRM so no relationship goes cold.

HUBSPOT • ARTLOGIC

02

Speed-to-Lead AI Agent. Auto-respond to “inquire about this work” web forms and SMS, trained on inventory, pricing tiers, and availability — qualifying collectors and booking private viewings before they drift to another gallery.

CUSTOM AI AGENT

03

Inventory & Provenance Knowledge System. A custom knowledge base trained on the artwork catalog, provenance, and artist info that instantly answers buyer FAQs and helps generate consignment paperwork.

CUSTOM KNOWLEDGE BASE

LET'S GET MOVING

YOUR NEXT STEPS

1

COMPLETE THE QUICK WINS PLAN

Complete the 4-Day Quick Wins Plan above — note any questions as you go.

2

SCHEDULE YOUR REVIEW CALL

We'll cover your questions and map out next-phase priorities together.

SCHEDULE YOUR REVIEW CALL →