

Workflow Audit Checklist

PeakOps Automation

Section 1 – Where Does Time Actually Go?

- What are the top 3 recurring tasks you or your team do every week?
- Which tasks feel boring, repetitive, or copy/paste heavy?
- Where do things get stuck waiting on approvals or information?
- Where are you double-entering the same data in multiple tools?

Section 2 – Signals You Need Better Workflows

- We rely on one 'spreadsheet hero' who knows how everything works.
- We miss deadlines because information is scattered across tools.
- We have to chase people for status updates.
- We manually build the same reports every week or month.

Section 3 – Automation Readiness

- The steps in this workflow are usually the same each time.
- Most of the work happens in tools like email, Sheets, Excel, CRMs, or forms.
- We can clearly define 'done' for this workflow.
- If this workflow ran faster and more consistently, it would matter.

Score & Next Step

How many boxes did you check? _____

0–3: Quick wins. 4–7: Strong candidate for automation. 8+ : High impact opportunity.

Want help mapping or automating your highest-scoring workflow? Visit peakops.club to book a call.