PeakOps AUTOMATION

Workflow Audit Checklist

This checklist will help you identify automation opportunities in your daily workflows. For each task you perform regularly, ask yourself these questions to determine if it's a good candidate for automation.

1. Task Frequency & Volume

- Do you perform this task daily or weekly?
- Does this task take more than 5 minutes each time?
- Do multiple team members perform this same task?
- Does the task involve repetitive steps?

2. Data Movement & Integration

- Do you copy data between different apps or systems?
- Do you manually update spreadsheets or databases?
- Do you send the same information to multiple places?
- Do you wait for data from one system to update another?

3. Communication & Notifications

- Do you send similar emails or messages repeatedly?
- Do you manually notify people when something happens?
- Do you check multiple places for updates or alerts?

■ Do you forward or copy information between team members?

4. File & Document Management

■ Do you manually organize, rename, or move files?

■ Do you create similar documents from templates?

■ Do you convert files between different formats?

■ Do you track versions or changes across multiple files?

5. Reporting & Analytics

■ Do you manually compile reports from different sources?

■ Do you create the same charts or dashboards regularly?

■ Do you export and format data for presentations?

■ Do you track KPIs or metrics manually?

6. Customer & Lead Management

■ Do you manually enter customer information into your CRM?

■ Do you qualify or route leads based on specific criteria?

■ Do you send follow-up sequences manually?

■ Do you track customer interactions across multiple tools?

7. Approval & Review Processes

■ Do you manually route items for approval or review?

■ Do you check for missing information before processing?

■ Do you follow up on pending approvals or deadlines?

■ Do you notify people when approvals are complete?

8. Scheduling & Calendar Management

■ Do you manually schedule meetings or appointments?

■ Do you send calendar invites or reminders?

■ Do you coordinate availability across team members?

■ Do you reschedule or update calendar events frequently?

Scoring Your Results

Count the number of checkmarks for each task or workflow area. The more boxes you checked, the better candidate it is for automation:

5-8 checkmarks: Excellent automation opportunity - high ROI potential
3-4 checkmarks: Good automation candidate - worth exploring
1-2 checkmarks: Possible automation - may need further evaluation
0 checkmarks: Keep manual for now - automation may not be worthwhile

Get Started with PeakOps

Ready to streamline your workflows and save hours every week? PeakOps Automation specializes in building custom automation solutions for busy professionals and small teams.

Website: peakops.com

Email: hello@peakops.com

Schedule: calendly.com/peakops

Our Services:

- Free Workflow Triage Call - Quick audit of your biggest time drains
- Workflow Opportunity Report ($195) - Detailed analysis and recommendations
- Automation Build ($495) - Custom automation implementation
- AI Automation Solution ($995) - Intelligent AI-powered workflows