



AI Audit Process

A comprehensive **7-step approach** to **identifying, prioritizing, and implementing** AI automation solutions for your business operations.

Initial Discovery & Goals Alignment

We'll start with an initial discovery meeting, which is essentially a deep conversation where we'll:



Identify what your company/practice sees as high-priority issues

(01)



Understand the tasks and processes that currently consume significant resources and employee time

(02)



For example:

- In a dental practice, this could be patient follow-ups or managing appointments;
- In real estate, it could be lead management or contract handling;
- In sales, maybe it's outreach and lead qualification.

(03)



At this stage, we intentionally avoid framing the discussion specifically around AI to ensure we're clearly focused on the real operational issues and not prematurely limiting solutions.

- Also, we like to assess the business problem and path to solving it without AI instead of just leaning on the assumption that AI will have the answer to everything (AI-agnostic problem solving)

(04)

Deep Dive into Current Operations & Tech Stack

Next, we dive deep into your current operational workflow and technology stack:



Process Mapping

Conduct detailed sessions with department heads or key stakeholders to map out their processes step-by-step.

- For instance, in dental, we might map patient journeys from booking appointments to reminders and billing.
- For real estate, we might look closely at client intake, listings management, and contract processes.
- In sales teams, we'll track how leads flow through from initial contact to closing deals.



Technology Assessment

Examine your current software tools and systems:

- Check if these systems have APIs or integration capabilities. Examples: Salesforce (sales), Dentrix or Open Dental (dental), Zillow or CRM systems (real estate).
- Identify closed-source systems without API integrations, discussing implications and potential workarounds



Integration Readiness

- Discuss openly about current system limitations and how comfortable or ready your organization is in integrating external solutions or transitioning to new tools.

Automation Opportunity Assessment

After the operational audit, we clearly outline automation opportunities:

(01)

Task Feasibility Evaluation

- **High feasibility tasks:** repetitive communications (*appointment reminders in dental, follow-ups in sales, property inquiries in real estate*).
- **Medium feasibility tasks:** personalized client interactions, contract preparations, lead nurturing.

(02)

Tool & Platform Identification.

- **Custom GPTs** for personalized messaging or knowledge-base queries.
- Workflow automation tools like **Make.com** or **n8n** for connecting multiple systems and APIs.
- Cloud-based solutions or ChatGPT for accessible team-wide automation projects.

(03)

Use Case Clarification

- Clarify specific use cases, providing real examples of successful automation from similar industries or tasks.

Prioritization & ROI Mapping

We then construct a prioritized roadmap clearly showing potential impact:

Automation Potential Assessment

For example, automating follow-up messages in a dental clinic can immediately reduce missed appointments and free up admin time.

Automating lead qualification in sales can rapidly accelerate sales cycles and improve sales productivity.

Complexity & ROI Determination

(01)

Quick wins:

Automating email reminders, lead intake forms, or basic scheduling tasks.

(02)

Medium-term wins:

Automating client nurturing sequences, detailed reporting, or custom CRM integrations.

(03)

Long-term transformative projects:

Full integration with closed systems, developing complex AI-driven sales assistants, or comprehensive patient management automation.

Detailed Audit Report & Implementation Roadmap

We'll compile our findings into a detailed, yet easy-to-follow AI Audit Report, clearly indicating:

Recommended Solutions

With explicit technology and integration points:

- Example: Dental practices could use Make.com to automatically sync appointment confirmations with their CRM.
- Real estate agents could use n8n to automate property listing updates across multiple platforms.
- Sales teams might deploy custom GPT-powered chatbots integrated with CRM to qualify leads automatically.

Implementation Steps

High-level implementation steps clearly outlined, alongside expected obstacles and how to address them:

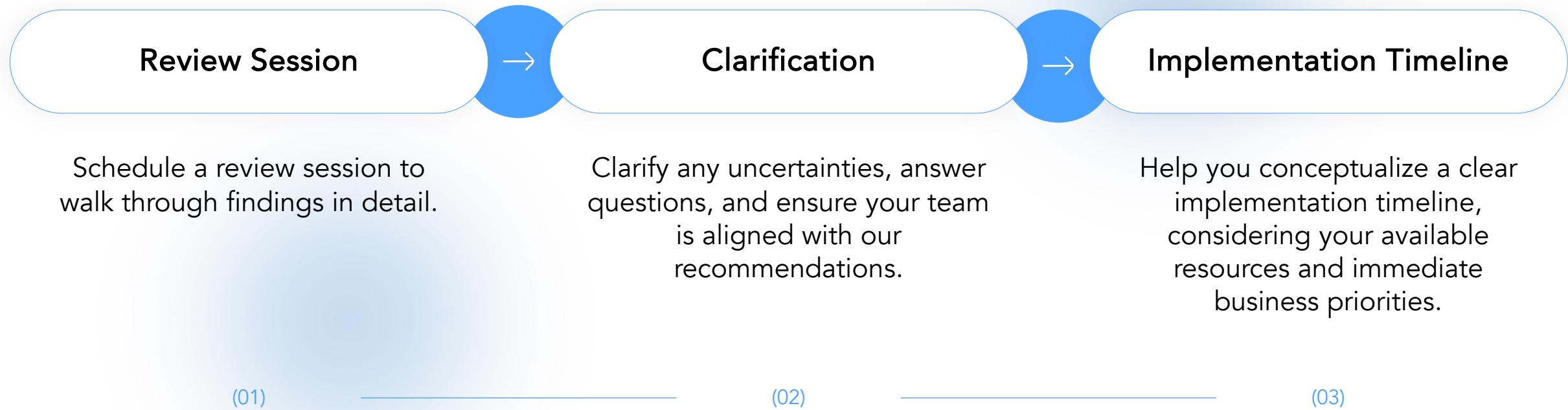
- Possible challenges such as API limitations, workflow complexities, or team training needs will be explicitly discussed.

Supplementary Solutions

Recommendations for supplementary solutions like web scraping (via Apify), OpenAI APIs, or external workflows clearly articulated.

Follow-up Review & Implementation Planning

After delivering the report, we'll:



Personnel Engagement & Change Management

Finally, we'll ensure the appropriate stakeholders and teams are involved and enthusiastic about the automation:

Secure Buy-In



Clearly highlight both quick, visible wins and longer-term strategic benefits to secure buy-in.

(01)

Identify Champions



Identify key internal champions who can oversee the quick-win implementations and maintain momentum for long-term projects.

(02)

Provide Training Guidance



Provide clear guidance on training or upskilling your teams might need to ensure smooth adoption and sustained benefits.

(03)