AI AUDIT for Solopreneurs

NOTE: "Focus on Problems, Not Solutions"

Name: _____

Business/Brand: _____

Industry: _____

Date: _____

Objective: To understand your business goals, daily operations, time-consuming tasks, and identify automation opportunities that will free you up to focus on revenue-generating activities and growth.

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1. Role & Business Overview 👤

What does your business do, and what's your role in it?

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_____

_____

What are your main goals or revenue targets for the year?

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_____

_____

What would you estimate your hourly rate to be? (What should your time be worth?)

_____

Do you have any assistants, contractors, or VAs? If so, what do they handle and what's their hourly rate?

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_____

2. Daily Tasks & Time Allocation 📝

Can you walk me through a typical day or week in your business?

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_____

_____

_____

What are the 1-3 most common tasks you perform every day?

1. _____

2. _____

3. _____

How much of your day is spent on revenue-generating activities (client work, sales, delivery) versus administrative or repetitive tasks?

_____

_____

What tasks are preventing you from taking on more clients or growing your business?

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_____

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_____

3. Process Deep Dive 🔬

Pick your most time-consuming recurring task. Walk me through the exact steps you take to complete it.

Task: _____

Step-by-step process:

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____

Which part of that process is the most manual or takes the most time?

_____

_____

What information do you need to find or reference to complete this task, and where do you get it from?

_____

_____

_____

_____

4. Tools & Technology 💻

What are the main software tools or platforms you use daily?

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_____

_____

What do you find most frustrating about the tools you currently use?

_____

_____

_____

Is there any double-entry of data or copying-and-pasting you have to do between different systems?

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_____

_____

Are there important processes that happen outside of your main software (e.g., in spreadsheets, email, notes apps, manual documents)?

_____

_____

_____

_____

5. Pain Points & Bottlenecks 😤

What is the most boring or repetitive part of your work?

_____

_____

_____

If you had an assistant (or another assistant), what tasks would you hand off to them immediately?

_____

_____

_____

What would free up the most time for you to focus on growth or revenue-generating work?

_____

_____

_____

Where do you see the biggest bottlenecks or delays in getting your work done?

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_____

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_____

6. Opportunity Identification 🎯

Which tasks do you perform more than 3 times per week?

1. _____

2. _____

3. _____

4. _____

5. _____

Of these tasks, which ones feel like they COULD be automated or streamlined, even if you don't know how?

_____

_____

_____

_____

Current Process Mapping (For Each Identified Opportunity)

Task being analyzed: _____

1. Walk me through this task step-by-step (write out each micro-step)

_____

_____

_____

_____

_____

2. How long does each step take? (time each component)

_____

_____

_____

_____

3. Which steps require human judgment vs. routine execution?

_____

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_____

4. What could go wrong? What edge cases exist?

_____

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_____

_____

AI Solution Scoping

5. Which steps could AI fully automate? (mark with ✓)

_____

_____

_____

6. Which steps need AI assistance + human review? (mark with ~)

_____

_____

_____

7. Which steps still need full human involvement? (mark with ✗)

_____

_____

_____

8. Calculate time saved: (fully automated steps + 50% of assisted steps)

Total current time per task: _____ minutes/hours

Estimated time with AI: _____ minutes/hours

Time saved per instance: _____ minutes/hours

Frequency per week: _____ times

Total weekly time saved: _____ hours

Annual time saved: _____ hours (weekly × 52)

Validation

9. Can we run a 1-2 week pilot to validate these numbers?

_____

_____

10. What's the worst-case scenario if AI performs below expectations?

_____

_____

_____

ROI Calculation Worksheet

For prioritized automation opportunity:

Time spent on task per week: _____ hours

Number of people doing this task: _____ (you + assistant/VA if applicable)

Total hours spent per week: _____ hours

Estimated % time saved by AI: _____ % (be conservative: 50-80%)

Total hours saved per week: _____ hours

Your hourly rate: $_____

Annual cost savings (your time): $_____ (hours saved × 52 × your rate)

Assistant/VA hourly rate (if applicable): $_____

Annual cost savings (assistant time): $_____

Total annual cost savings: $_____

Estimated implementation cost: $_____

ROI %: _____ % (Annual savings ÷ Implementation cost × 100)

Next Steps & Priorities 🚀

Top 3 automation opportunities identified:

1. _____
2. _____
3. _____

Immediate next actions:

_____

_____

_____

_____