

# AI AUDIT for Owners

NOTE: "Focus on Problems, Not Solutions"

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Name: \_\_\_\_\_

Position: \_\_\_\_\_

Company: \_\_\_\_\_

Date: \_\_\_\_\_

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Objective: To understand the high-level business goals, team structures, major challenges, and how success is measured. This is where you find out what the leadership thinks the problems are.

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## 1. Role & Team Overview

Can you describe your role in the company?

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What are the main goals or KPIs for the year?

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Could you walk me through your company's structure? Who reports to whom?

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What are their monthly or hourly salaries?

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## 2. Core Processes & Workflow

From a high level, what are the most critical processes your team manages?

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Where do you see the biggest bottlenecks or delays in your team's workflow?

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Which tasks seem to consume the most man-hours or resources?

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### 3. Tools & Technology

What are the main software systems or tools your team relies on?

What are your biggest frustrations with your current technology stack?

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

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#### 4. Pain Points & Strategic Challenges

What are the biggest challenges your team is facing right now?

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If you had a magic wand, what is the one problem you would solve for your team overnight?

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What do you feel is preventing your team from being more efficient or effective?

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## 5. Future Vision



Where do you see the biggest opportunities for improvement in the company?

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How does your team generally respond to new technology? What would make a new tool successful versus likely to be resisted?

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## Current Process Mapping (For Each Identified Opportunity)

Process being analyzed: \_\_\_\_\_

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

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

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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 ✓)

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

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

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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)

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**Validation**

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

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

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**ROI Calculation Worksheet**

For prioritized automation opportunity:

Time spent on task per week: \_\_\_\_\_ hours

Number of employees doing this task: \_\_\_\_\_

Total hours spent per week: \_\_\_\_\_ hours (task time × number of employees)

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

Total hours saved per week: \_\_\_\_\_ hours

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Average annual salary (for roles doing this task): \$\_\_\_\_\_



Average hourly rate: \$\_\_\_\_\_ (annual salary ÷ 2,080)

Weekly cost savings: \$\_\_\_\_\_ (hours saved × hourly rate)

Annual cost savings: \$\_\_\_\_\_ (weekly savings × 52)

\_\_\_\_\_

Estimated implementation cost: \$\_\_\_\_\_

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

**Next Steps & Priorities**

\_\_\_\_\_

Top 3 automation opportunities identified:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Immediate next actions:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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