AI AUDIT for Solopreneurs

NOTE: "Focus on Problems, Not Solutions"

Name: _____

Business/Brand: _____

Position: _____

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?

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_____

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

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_____

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

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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:

_____

_____

_____

_____

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_____

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

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_____

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

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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?

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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)?

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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?

6. Opportunity Identification 🎯

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

_____

_____

_____

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)

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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 ✓)

_____

_____

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

_____

_____

_____

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

_____

_____

_____

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?

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_____

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

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Top 3 automation opportunities identified:

_____

_____

_____

Immediate next actions:

_____

_____

_____