

AI AUDIT for Staff

NOTE: "Focus on Problems, Not Solutions"

Name: _____

Position: _____

Department: _____

Date: _____

Objective: To understand the on-the-ground reality of daily tasks. This is where you uncover the specific, timeconsuming, and often frustrating details that managers might not see.

1. Daily Role & Responsibilities

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

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

How much of your day is spent on your core responsibilities versus administrative or repetitive tasks?

2. Step-by-Step Process Deep Dive

Could you walk me through the exact steps you take to complete [a specific, common task]?
(e.g., "onboard a new client," "process an invoice," "create a weekly report")

Task: _____

Step-by-step process:

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?

3. Tools & Frustrations

What software do you spend most of your day working in?

What do you find most frustrating about the tools you have to use?

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

4. Pain Points & Wishlist

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

If you had an assistant, what tasks would you give them immediately?

How do you currently track your work or report on your progress?

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?

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

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 ~~mark~~)

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 \times 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: _____

Total hours spent per week: _____ hours (task time × number of people)

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

Total hours saved per week: _____ hours

Average annual salary (for this role): \$ _____

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:
