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, time-consuming, 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?

1. _____

2. _____

3. _____

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:

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?

_____

_____

_____

_____

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 ✗)

_____

_____

_____

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: _____

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:

1. _____
2. _____
3. _____

Immediate next actions:

_____

_____

_____

_____