

# 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?

### 3. Tools & Technology

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

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What are your biggest frustrations with your current technology stack?

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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  $\times$  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  $\times$  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)

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

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

## Next Steps & Priorities

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Top 3 automation opportunities identified:

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Immediate next actions:

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