

# 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?**

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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 X)

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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)

## 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)

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

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

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## **Next Steps & Priorities**

**Top 3 automation opportunities identified:**

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

**Immediate next actions:**

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