

AI Audit Checklist

Find Your Highest-Impact Automation in 10 Minutes

Most small businesses know they're spending time on repetitive work — they just haven't sat down to figure out which task to fix first. This worksheet walks you through a simple, honest process: list what eats your time, check it against six signs that a task is automation-ready, score it for impact and feasibility, and walk away with one clear priority instead of a vague feeling that "we should probably automate something."

 Takes about 10 minutes

1

List Your Tasks

Write down 4-6 recurring tasks that take up real time each week. (2 min)

2

Check the Signals

Run each task through six quick yes/no questions. (5 min)

3

Score & Pick One

Score impact and feasibility, then circle your #1 priority. (3 min)

A note on honesty: this checklist won't tell you exactly how much money a given automation will save — that depends on your business, your tools, and your numbers. What it will do is give you a structured way to compare your own tasks against each other, so the task you tackle first is the one most likely to be worth the effort.

STEP 1 OF 4

List Your Recurring Tasks

Think about the last two weeks. What did you (or someone on your team) do over and over that felt tedious, repetitive, or like "busywork" — even if it's necessary? List 4–6 of them below. Don't filter yet; you'll narrow it down in Step 3.

TASK	HOW OFTEN?	TIME PER OCCURRENCE	EST. TOTAL TIME / MONTH

Stuck for ideas? Common candidates we see across small businesses:

- Responding to the same handful of customer questions over and over
- Manually entering the same data into two or more systems (CRM, spreadsheet, invoicing tool)
- Writing and sending follow-up emails or reminders one by one
- Scheduling, rescheduling, or confirming appointments
- Drafting social media posts or weekly content from scratch
- Pulling numbers together into a weekly or monthly report
- Chasing unpaid invoices or sending payment reminders
- Onboarding a new client or employee with the same set of steps each time

STEP 2 OF 4

Check It Against 6 Automation Signals

For each task from Step 1, ask these six questions. The more you check "yes," the more automation-ready that task is. A task with 5-6 checks is a strong candidate. A task with 0-2 is probably better left to a human for now.

1 **Repetitive**

You (or someone) do the exact same steps, in the exact same order, almost every time.

2 **Rule-Based**

There's a clear "if this happens, then do that" logic — not a judgment call that genuinely needs a human's read on the situation.

3 **High Frequency**

It happens daily, or multiple times a week — not a once-a-quarter task.

4 **Time-Consuming**

Each occurrence takes real time on its own, or the minutes add up fast once you multiply by frequency.

5 **Error-Prone**

Mistakes happen because it's manual — typos, missed follow-ups, mismatched numbers between systems.

6 **Data-Driven**

It mostly involves moving, formatting, copying, or summarizing information between people or systems.

TASK (FROM STEP 1)	SIGNALS CHECKED (0-6)

STEP 3 OF 4

Score for Impact & Feasibility

Being automation-ready isn't the same as being worth doing first. A task you do daily for two minutes may matter less than something you do weekly for two hours. Score each task on two separate scales, then multiply them for a priority score.

Impact Score (1-5)

- 1** — Saves a few minutes a month, no real cost
- 2** — Minor convenience, occasional annoyance
- 3** — Noticeable: an hour or more a week
- 4** — Significant: several hours a week, or affects customer experience
- 5** — Major: directly tied to revenue, response time, or capacity to take on more work

Feasibility Score (1-5)

- 1** — Needs custom development, multiple integrations, real complexity
- 2** — Doable, but needs real setup time and some technical help
- 3** — Moderate: one tool, some configuration
- 4** — Mostly off-the-shelf, light setup
- 5** — Simple: an existing tool or template handles most of it already

Priority Score = Impact × Feasibility. Higher is better — it means the task matters and it's realistic to actually get done.

High Impact + High Feasibility Quick Win — do this one first. High score, low friction.	High Impact + Low Feasibility Big Bet — worth doing, but plan for it rather than rushing it.
Low Impact + High Feasibility Nice-to-Have — easy, but won't move the needle much. Fine for a slow week.	Low Impact + Low Feasibility Skip for Now — not worth the effort relative to the payoff.

TASK	SIGNALS (0-6)	IMPACT (1-5)	FEASIBILITY (1-5)	PRIORITY SCORE

STEP 4 OF 4

Cross-Check & Commit to One

Before you finalize, check your top-scoring task against these commonly high-ROI categories for small businesses. If your pick falls into one of these, that's a good sign you're on the right track. If it doesn't, that's not disqualifying — just worth a second look.

Lead Capture & Follow-Up

Instant responses to new inquiries instead of hours or days of delay.

Appointment Scheduling & Reminders

Booking, confirming, and reminding without back-and-forth emails.

Customer FAQ & Support

Handling the same handful of questions automatically, 24/7.

Invoice & Payment Follow-Up

Automated reminders instead of manually chasing late payments.

Social Media Content

Drafting and scheduling posts instead of starting from a blank page each week.

Email Inbox Triage

Sorting, flagging, or drafting replies to routine messages.

Data Entry Between Systems

Keeping your CRM, spreadsheet, and invoicing tool in sync without copy-paste.

Document & Report Generation

Pulling together recurring reports or documents from existing data.

Client & Employee Onboarding

A repeatable sequence of welcome steps instead of starting from scratch each time.

Review & Feedback Requests

Following up at the right moment instead of remembering to ask.

YOUR #1 PRIORITY

Task:

Priority Score:

Why this one, in one sentence:

NEXT STEP

Want a second set of eyes on this?

A checklist gets you to a strong hypothesis. A short conversation can confirm whether it actually holds up, and what it would take to build. Book a free AI Audit call and bring this worksheet — we'll go through your #1 priority together and map out what an automation for it would realistically look like.

[Book Your Free AI Audit →](#)