

The AI Workflow Audit Checklist

Before you automate anything, follow one real example all the way through your business. This checklist shows you where to look.

Check the boxes that describe your business. Work that repeats, follow-up that depends on memory, and reports built by hand are usually the first places AI pays off — but often the real fix is clearer ownership or a cleaner process, not a new tool.

1 Look for repetitive tasks

- ☐ What do we write repeatedly?
- ☐ What do we copy and paste often?
- ☐ What do we summarize by hand?
- ☐ What messages or updates do we send all the time?
- ☐ What reports or notes take too long to clean up?

Takeaway: Work that repeats often and follows a predictable pattern is usually worth reviewing first.

2 Find follow-up gaps

- ☐ Do leads always receive a follow-up message?
- ☐ Are estimates followed up consistently?
- ☐ Do customers hear from us when work is delayed or rescheduled?
- ☐ Are review requests sent after completed work?
- ☐ Does the team know the next step after each interaction?

Takeaway: If follow-up depends on someone remembering, it's a workflow worth improving.

3 Review customer communication

- ☐ More consistent customer updates
- ☐ Cleaner appointment reminders
- ☐ Consistent quote and estimate follow-up
- ☐ Simple explanations of the next step
- ☐ Polished emails built from rough notes
- ☐ Faster answers to common questions

Takeaway: The goal isn't to remove the human touch — it's to make clear communication easier and more reliable.

4 Check your notes and documentation

- ☐ Are job notes hard to understand later?
- ☐ Are meeting notes scattered across different places?
- ☐ Do important details live in texts, emails, or notebooks?

- ☐ Does the team rewrite the same process repeatedly?
- ☐ Could notes become summaries, checklists, or customer updates?

Takeaway: AI can turn rough information into cleaner documentation — while a person still reviews the result.

5 Look at reporting and owner visibility

- ☐ What numbers do you review every week?
- ☐ What would be useful to summarize automatically?
- ☐ Which reports take too long to prepare?
- ☐ Where do you dig through notes, spreadsheets, or CRM activity?
- ☐ What information would help you catch problems sooner?

Takeaway: Reporting should help someone make a decision — not just create more information to review.

6 Review your current tools

- ☐ What tools do we already pay for?
- ☐ Which features have we never turned on?
- ☐ What already connects to what?
- ☐ Where are we paying for two tools that do the same job?

Takeaway: The best workflow is often built around tools the team already understands and pays for.

7 Choose the best first workflow

- ☐ Repeated often
- ☐ Easy to explain
- ☐ Low-risk
- ☐ Time-consuming today
- ☐ Valuable when it's made consistent

Takeaway: A small workflow that actually gets used beats an ambitious system that never becomes part of the day.

8 Decide what NOT to automate yet

- ☐ Too unclear
- ☐ Too high-risk
- ☐ Too inconsistent
- ☐ Too dependent on judgment
- ☐ Not repeated often enough
- ☐ Built on a broken process

Takeaway: Fix the process before you accelerate it. AI should make a good workflow easier — not make a messy one move faster.

9 Turn the checklist into an action plan

- ☐ Quick wins — useful improvements with limited effort
- ☐ Worth building soon — needs planning, config, or documentation
- ☐ Not ready yet — unclear, high-risk, or needs to be stabilized first

Start here: clean up customer follow-up, then turn rough notes into customer-ready updates, then build a reusable weekly owner summary.

10 Choose the tool AFTER you understand the problem

- ☐ Where is time actually being lost today?
- ☐ What result do we expect from fixing it?
- ☐ Who owns the workflow once it exists?
- ☐ Only then: ChatGPT, Claude, Zapier, Make, Workspace, or CRM?

Takeaway: The tool matters — but the workflow, the ownership, and the expected result matter more.

Want a second set of eyes on one of these?

Book a free 30-minute Workflow Assessment — no pitch. bradleyhankins.com/contact.html