OPERATIONS AUDIT TEMPLATE

Identify and prioritize automation opportunities

STEP 1: PROCESS INVENTORY

List the top 10 repetitive processes. Don't filter yet.

Frequency key: D = Daily, W = Weekly, M = Monthly, Q = Quarterly

1. Process: Owner: Freq:

2. Process: Owner: Freq:

3. Process: Owner: Freq:

4. Process: Owner: Freq:

5. Process: Owner: Freq:

6. Process: Owner: Freq:

7. Process: Owner: Freq:

8. Process: Owner: Freq:

9. Process: Owner: Freq:

10. Process: Owner: Freq:

STEP 2: IMPACT ASSESSMENT

For each process, estimate the impact of automation.

Time/Instance: minutes per occurrence
Error Impact: H (3pts) = costly, M (2pts) = moderate, L (1pt) = minor
Scale Impact: H (3pts) = constant, M (2pts) = frequent, L (1pt) = occasional
Total = (Time/10) + Error + Scale. Higher = higher priority.

1. Time: min   Error: Scale: Total:

2. Time: min   Error: Scale: Total:

3. Time: min   Error: Scale: Total:

4. Time: min   Error: Scale: Total:

5. Time: min   Error: Scale: Total:

6. Time: min   Error: Scale: Total:

7. Time: min   Error: Scale: Total:

8. Time: min   Error: Scale: Total:

9. Time: min   Error: Scale: Total:

10. Time: min   Error: Scale: Total:

STEP 3: FEASIBILITY CHECK

For your top 5 scoring processes, assess automation feasibility.

Data Ready? Is input data digital, structured, accessible?
Rules Clear? Can decision logic be written down?
Systems OK? Do systems have APIs or exports?

1. Process:

      Data Ready

      Rules Clear

      Systems OK

2. Process:

      Data Ready

      Rules Clear

      Systems OK

3. Process:

      Data Ready

      Rules Clear

      Systems OK

4. Process:

      Data Ready

      Rules Clear

      Systems OK

5. Process:

      Data Ready

      Rules Clear

      Systems OK

STEP 4: QUICK WINS (HIGH IMPACT, LOW EFFORT)

Your top priorities based on this audit:

1.

2.

3.

READY TO ACT ON YOUR FINDINGS?

Bring this completed audit to a discovery call.

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