

The 20-Minute AI Audit Checklist

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Ten honest yes/no questions. Walk your own team through these before calling anyone. Fifteen to twenty minutes, no tools required.

- ☐ 1. Do you have a written list of every task that repeats more than once a week and takes over 15 minutes?
- ☐ 2. Does anyone on your team know which AI tools different people are already using, without your approval?
- ☐ 3. If your most experienced employee left tomorrow, is their judgment written down anywhere, or only in their head?
- ☐ 4. Do you re-enter the same information into more than one system by hand (CRM, accounting, scheduling)?
- ☐ 5. Do leads or customer questions ever sit unanswered for more than a few hours because everyone's busy?
- ☐ 6. Does anyone spend real time each week manually pulling numbers from more than one dashboard or platform?
- ☐ 7. Have you ever tried an AI tool once, gotten a mediocre result, and quietly written off AI for your business?
- ☐ 8. Do you have a written policy for what information staff can and can't put into an AI tool?
- ☐ 9. Is there a task you've been meaning to document or systemize for over six months and just haven't gotten to?
- ☐ 10. If asked right now, could you name three specific hours-per-week savings AI could realistically deliver in your business this quarter?

Scoring

Count how many you answered yes to.

- 0-2 yes: You're in reasonable shape. Keep an eye on question 9, that's usually where the next real gap is hiding.
- 3-5 yes: You're behind the businesses in your space that have already started. Nothing urgent is broken yet, but the gap compounds every quarter you wait.
- 6+ yes: You're further behind than you probably think. This is a good problem to have, it means there's real, fast, low-risk opportunity sitting in your own operation right now.

Question 9 and question 3 are worth a second look no matter your score. They're the two most common blind spots we find in real operations.