

# 25-Minute AI Workflow Audit Kit

## Free Lead Magnet: The 25-Minute AI Workflow Audit Kit

### Audience

Small business owners/operators who are curious about AI but do not know what to automate first.

### Promise

In 25 minutes, find one workflow worth automating — without buying tools, hiring a consultant, or guessing from AI hype.

### The audit

#### Step 1 — Find the repeat loop (5 min)

List 5 tasks your team repeats weekly: - Lead intake - Estimate follow-up - Scheduling - Review requests - Invoice reminders - Customer FAQs - Reporting - Content posting

Score each task 1–5: - Frequency - Revenue impact - Annoyance - Mistake risk - Ease of delegation

Pick the highest score.

#### Step 2 — Map the current workflow (7 min)

Fill in: - Trigger: what starts this task? - Input: what information is needed? - Decision: what judgment is required? - Output: what should happen? - Tool: where does it live now? - Human approval: where must a person stay in control?

### **Step 3 — AI fit test (5 min)**

Good AI candidates: - summarizing messy notes - drafting follow-ups - sorting leads - extracting fields from forms/emails - generating first-draft replies - creating checklists/SOPs - reminding humans what to do next

Bad first candidates: - payments without review - legal/medical judgment - anything requiring passwords/private keys - customer-facing sends with no approval

### **Step 4 — First workflow prompt (5 min)**

Copy/paste:

```
Act as my business operations assistant.  
I want to improve this workflow: [WORKFLOW].  
Current trigger: [TRIGGER].  
Inputs: [INPUTS].  
Current tools: [TOOLS].  
Pain: [PAIN].  
Human approval required before: [APPROVAL POINT].
```

Give me:

1. The simplest version of this workflow to automate first
2. The exact input form or checklist I need
3. The AI prompt/system instructions
4. The human review step
5. The output format
6. What could go wrong
7. How to measure whether this saved time or captured revenue

### **Step 5 — Decide the next action (3 min)**

Choose one: - Document it as an SOP - Build a no-code version - Connect it to email/calendar/sheets - Book a Free Bottleneck Audit with Sam

CTA: If you want me to identify the highest-ROI workflow in your business, book a Free Bottleneck Audit.