
CEO TRANSFORMATION TECHNOLOGIES LLC

BUSINESS AUTOMATION AUDIT™

Find repetitive work that may be ready for automation.

FREE CEO RESOURCE

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HOW MUCH TIME IS YOUR BUSINESS WASTING?

Automation is useful when the work is stable enough to describe. If three people perform the same task three different ways, I would not automate it yet. First decide which version is correct. Then automate the repetitive parts and keep human judgment where exceptions actually matter.

DO NOT AUTOMATE CHAOS

A broken process does not become a good process because it runs automatically. Bad data moves faster. Wrong emails send faster. Missed exceptions become harder to notice. Map the work first.

TASK	HRS/WEEK	REPEATABLE?	RISK IF MISSED	NOTES
Lead follow-up	_____	Yes / No	Low / Med / High	_____
Appointment reminders	_____	Yes / No	Low / Med / High	_____
Client onboarding	_____	Yes / No	Low / Med / High	_____
Document requests	_____	Yes / No	Low / Med / High	_____
Invoices/payment reminders	_____	Yes / No	Low / Med / High	_____
Data entry	_____	Yes / No	Low / Med / High	_____
Status updates	_____	Yes / No	Low / Med / High	_____
Email responses	_____	Yes / No	Low / Med / High	_____
Scheduling	_____	Yes / No	Low / Med / High	_____
Internal notifications	_____	Yes / No	Low / Med / High	_____
Reporting	_____	Yes / No	Low / Med / High	_____
Social content workflow	_____	Yes / No	Low / Med / High	_____
Customer support triage	_____	Yes / No	Low / Med / High	_____

AUTOMATION PRIORITY MATRIX

PROCESS	FREQUENCY	RULE-BASED?	HUMAN REVIEW?	PRIORITY
_____	Daily / Weekly / Monthly	Yes / No	Yes / No	1 / 2 / 3
_____	Daily / Weekly / Monthly	Yes / No	Yes / No	1 / 2 / 3
_____	Daily / Weekly / Monthly	Yes / No	Yes / No	1 / 2 / 3
_____	Daily / Weekly / Monthly	Yes / No	Yes / No	1 / 2 / 3
_____	Daily / Weekly / Monthly	Yes / No	Yes / No	1 / 2 / 3

The first automation I want to build is:

The trigger will be:

The automated action will be:

A human should review when:

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