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Workflow automation audit workbook

Map the repeated steps in your business and score them for automation

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Workflow automation for small service businesses

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Free to copy and use

How to use this workbook

Most businesses cannot list the tasks that eat the week, because the tasks are small and fast. Once they are written down, the ranking does itself: the step that repeats most and costs the most time is the one to automate first.

What it is	A one-week log of the tasks that repeat, with a score for each step.
Who it's for	Owners and operations leads who suspect the admin is eating the week.
How long	A week of keeping the log, then about an hour to score it.
What you need	The tools you already use, and a normal week to observe.

The rule

Automate the repeating middle: the tasks with clear rules that move data between tools. Keep human the judgment, the first conversations and anything that requires a person's care.

01 Your weekly log

For one week, every time you or your team repeats a task, add a line. Re-typing details, chasing follow-ups, moving files, assembling documents, logging payments, all of it.

Task	Approx. minutes each time	Times this week	Who does it

Rank the top five

Task	Weekly minutes	Rank

02 Score each top task

For each of your top five tasks, score these statements.

0 = no · 1 = sometimes · 2 = yes, every time

Task 1

Score each statement	0	1	2
It happens more than once a week	◯	◯	◯
It follows the same steps every time	◯	◯	◯
It moves details between two or more tools	◯	◯	◯
A mistake would be noticed quickly, and is recoverable	◯	◯	◯
It could be described in one sentence	◯	◯	◯

Section score _____ / 10

Score the remaining four tasks the same way, then rank by total.

03 Keep human

0 = no · 1 = sometimes · 2 = yes, every time

Score each statement	0	1	2
First conversations with clients stay with a person	◯	◯	◯
Anything a client sees is approved by a person before it goes out	◯	◯	◯
Judgment calls, pricing exceptions and complaints stay human	◯	◯	◯
The workflow's purpose is understood by the team	◯	◯	◯
Nobody is asked to approve something they cannot explain	◯	◯	◯

Section score _____ / 10

Your top workflow

The top-ranked task is your first build. Describe it in one sentence, the way you would ask a builder to do it.

Workflow:

Trigger:

AI drafts:

Who approves:

Where it is recorded:

If you cannot describe it in one sentence, it is too big. Choose the smaller step inside it.

Measure before and after

One hour a day is about 250 hours a year. Measure the task for a week before the build, then again after, so the saving is real.

	Before	After
Minutes per run		
Runs per week		
Weekly minutes		
Annual hours		

Next steps

- Build the smallest version of the workflow first
- Test the failures, not just the happy path
- Keep a person approving what goes out
- Let the result fund the next workflow

About Nikolas Gannon

Nikolas Gannon

I find where small businesses lose hours and money to repeated admin, and I build the simpler system. Workflows, websites and systems, built in the tools you already use.

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BASED IN

Sydney, working across Australia