

# Operations Audit Worksheet

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Identify Where Your Business Is Bleeding Time

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**From:** *Hire AI, Not People* by Shawn Kercher | Chapter 3

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## Instructions

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Set aside 30 uninterrupted minutes. Open your voice recorder (phone, computer, or dedicated device) and talk through each question out loud. Don't overthink—just speak naturally.

After recording, get the transcript and paste it into ChatGPT or Claude with this prompt: > "Summarize the patterns in this transcript. Identify my top 5 time drains and rank them by frequency, pain level, and revenue impact."

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## The Five Questions

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### Question 1: Where do you spend time that doesn't require your expertise?

*Think about your last week. What tasks ate up hours but didn't actually need YOU specifically?*

**Examples:** Answering basic questions, scheduling, sending reminders, chasing people for information, copying data between systems

**Your answer:**

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### Question 2: What falls through the cracks?

*What do you forget to do? What gets delayed because you're too busy?*

**Examples:** Follow-ups you meant to send, leads you meant to call back, invoices you meant to chase

**Your answer:**

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**Question 3: What do customers complain about (even politely)?**

*What friction do customers experience? Where does your operation fail them?*

**Examples:** Slow response times, difficulty booking, lack of updates, having to repeat information

**Your answer:**

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**Question 4: What would you hire for if you had unlimited budget?**

*Forget constraints. What role would you fill tomorrow?*

**Examples:** Receptionist, scheduler, follow-up person, customer support, admin assistant

**Your answer:**

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**Question 5: What's the ONE thing that, if it disappeared tomorrow, would change your life?**

*One thing. Not five. The single biggest time drain.*

**Your answer:**

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# Priority Scoring Matrix

List your top 5 time drains from the questions above. Score each 1-5 on four criteria.

Time Drain	Frequency (1-5)	Pain Level (1-5)	Revenue Impact (1-5)	Simplicity (1-5)	TOTAL
1. _____	___	___	___	___	___
2. _____	___	___	___	___	___
3. _____	___	___	___	___	___
4. _____	___	___	___	___	___
5. _____	___	___	___	___	___

**Scoring Guide:** - **Frequency:** How often does this happen? (5 = multiple times daily) - **Pain Level:** How much does this frustrate you? (5 = makes you want to quit) - **Revenue Impact:** How much money does this cost you? (5 = losing significant revenue) - **Simplicity:** How straightforward are the rules? (5 = clear, predictable patterns)

## Your First Automation Target

Highest scoring time drain: \_\_\_\_\_

Which AI Employee type does this match? (Circle one)

- AI Front Desk (responding to inquiries + booking)
- AI Sales Rep (follow-up + proposals)
- AI Support Agent (customer questions)
- AI CRM Assistant (data management)
- AI Content Creator (marketing content)
- AI Operations Assistant (internal tasks)

## Next Step

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Take this worksheet to Chapter 4: BUILD and design your workflow blueprint.

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*From Hire AI, Not People by Shawn Kercher*

*[hummingagent.ai/book-resources](https://hummingagent.ai/book-resources)*