



GROWTH AND PLANNING

Automation opportunity audit

An audit for finding repeatable, low-risk operational work that can be automated while keeping a person responsible for client-facing decisions.

A practical worksheet from Stelaah

Use it, adapt it, and save it with the client work it supports.

HOW TO USE THIS

The team is spending too much time on repetitive coordination.

WORK THROUGH THE CHECKLIST

- ☐ 01 **List repeated tasks**
- ☐ 02 **Measure frequency**
- ☐ 03 **Check decision risk**
- ☐ 04 **Define the trigger**
- ☐ 05 **Set a human review**
- ☐ 06 **Test one workflow**

Before you close this

Name one owner, one next action, and one date. A worksheet only helps when the next commitment is visible to the people doing the work.

Notes and decisions

Use this page to record what changes after you work through the checklist.

This practical workflow resource is not legal, financial, tax, or security advice. Adapt it to your team and circumstances.