

Automation Audit Scorecard

Score the recurring work in your business to see what to automate first, what needs a real plan, and what to standardize before any software touches it. Takes about an hour for a small team.

BUSINESS _____

DATE _____

PREPARED BY _____

How to run the audit

- List every recurring task for two weeks.** Keep a running list of anything that happens more than once a month: data entry, reminders, follow-ups, reports, copying between apps. Ask everyone on the team to add to it.
- Estimate frequency and time.** For each task, write how often it happens in a month and how many minutes it takes, including the time spent switching between apps.
- Put a cost on mistakes.** Count how often it goes wrong and what a miss costs: redo time, a refund, a late fee, a lead that went cold.
- Score rules, data, and effort.** Rate each task 1 to 5 on how rule-based it is, how digital its inputs are, and how hard it would be to automate with the tools you have.
- Sort by priority and read the verdict.** The sheet ranks tasks by annual cost adjusted for readiness and effort, and labels each one: automate first, plan the project, standardize first, or leave it manual.
- Automate one task, then measure.** Start with the top 'Automate first' task. After a month, compare the time and errors to your estimate before moving to the next one.

Scoring rubric

Rules (1 to 5)

- 1: Judgment every time; no two are alike
- 3: Same steps most of the time, with regular exceptions
- 5: Identical steps every time; you could write them on a card

Data (1 to 5)

- 1: Paper, phone calls, or free-form conversations
- 3: Emails or PDFs that someone has to read and retype
- 5: Already in a form, app, or spreadsheet with consistent fields

Effort (1 to 5)

- 1: A setting or built-in feature in software you already pay for
- 3: A multi-step workflow in Zapier or Make, or a new app
- 5: Custom development or replacing a core system

The math

Annual cost	$((\text{times per month} \times \text{minutes each} / 60) \times \text{hourly cost} + \text{errors per month} \times \text{cost per error}) \times 12$
Readiness	$(\text{rules} + \text{data}) / 2$
Priority	$\text{annual cost} \times \text{readiness} / \text{effort} / 100$. Higher goes first.

What the verdict means

VERDICT	WHEN	WHAT TO DO
Standardize first	Readiness below 3	The steps change every time or the inputs are messy. Write down how it should be done and run it that way for a month. Then score it again.
Leave it manual	Ready, but costs under \$1,500 a year	Not worth a project yet. Revisit it when volume grows.
Automate first	Ready, worth it, and effort 1 or 2	Start here. Usually a built-in feature or a simple Zapier or Make workflow you can finish in days.
Plan the project	Ready and worth it, but effort 3 or more	Worth doing, but it needs a real plan: a connector, some custom work, or a change of tools. Sequence it after the quick wins.

Example: a hypothetical service business

TASK	HOURS / MO	ANNUAL COST	READINESS	EFFORT	PRIORITY	VERDICT
Send invoices after each job	8.0	\$4,320	4.5	1	194	Automate first
Reply to website quote requests	10.0	\$10,800	3.5	3	126	Plan the project
Enter receipts into QuickBooks	4.0	\$2,340	3.5	1	82	Automate first
Remind customers the day before a visit	3.7	\$2,760	5	2	69	Automate first
Build next week's crew schedule	8.0	\$6,240	2.5	4	39	Standardize first
Chase unsigned estimates	2.0	\$720	4	2	14	Leave it manual

Illustrative numbers, not a client result. Notice that the most expensive task, replying to quote requests, is not first: it is harder to build, so the invoicing quick win goes ahead of it. The crew schedule costs real money but is not consistent enough to automate yet.

Your scorecard

TASK	TIMES / MO	MIN EACH	\$ / HR	ERRORS / MO	\$ / ERROR	RULES	DATA	EFFORT	ANNUAL COST	VERDICT

Skip the math. The Automation Audit Scorecard spreadsheet scores and ranks tasks as you type:
pinstripeservices.com/automation-audit-scorecard.

Want help building the top of your list? Pinstripe designs and builds automations with the tools you already use: pinstripeservices.com/services/automation.

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