WORKFLOW AUDIT

Find where AI can give you time back

Name | **Role** | **Week of**

PURPOSE

Most AI advice starts with the tools. We start with you. This audit maps how you actually run your day, your week and your month, so we can find the places where AI and automation fit into work you already do.

The goal is not to change how you serve your clients. It is to take the repetitive work off your plate so you have more time for them.

HOW TO USE IT

1. Keep this open for one normal work week. Add to it as you go, not from memory on Friday.
2. Page 2: sketch what a typical day looks like for you.
3. Page 3: list the things you do every week and every month.
4. Pages 4 and 5: pick your three biggest time eaters and walk through the steps.
5. Page 5: sort your tasks and tell us what you want more time for.
6. Save it and send it back. Rough notes are fine. Honest beats tidy.

WHERE AI USUALLY FITS

As you fill this in, watch for tasks that:

- Follow the same steps every time
- Start from a blank page: emails, listing descriptions, newsletters, social posts
- Move information from one place to another: CRM, forms, spreadsheets, DocuSign
- Pull numbers or reports together
- Depend on you remembering to follow up
- Mean reading or summarizing something long: calls, documents, market data

WHAT STAYS WITH YOU:
The conversations, judgment calls and relationships your clients hire you for. AI takes the busywork around them, not the work itself.

YOUR DAY

What does a typical work day look like?

Use a normal day, not your best or your worst. Write what you actually do, roughly in order, and about how long it takes.

How do you start your day? *(first hour: email, texts, CRM, showings...)*

Morning

Midday

Afternoon

Evenings and weekends *(what work follows you home?)*

What interrupts you most?

What do you put off, or do at the last minute?

YOUR WEEK AND MONTH

The work that repeats

List anything you do on a schedule. Under Energy, put + if it gives you energy and - if it drains you.

EVERY WEEK

Task	Which day(s)	Time each	Tools or systems used	Energy + / -

EVERY MONTH OR QUARTER

Task	When	Time each	Tools or systems used	Energy + / -

WORKFLOW DEEP DIVE

Your three biggest time eaters, step by step

Pick the three tasks from pages 2 and 3 that eat the most time or that you dread most. Walk through each one the way you would teach it to a new assistant.

EXAMPLE: WRITING AN OFFER

What starts it:	The buyer says "let's write it."
Steps:	Pull the listing details, fill in the form, add conditions, set up DocuSign, send, follow up.
Tools:	MLS, forms software, DocuSign, email, CRM.
Time / how often:	45 to 60 minutes, two or three times a week.
Where it slows down:	Retyping the same details into three places, chasing signatures.

WORKFLOW 1

Task

What starts it?

Steps, in order

Tools and systems it touches

Time each / how often

Where does it slow down, wait on someone, or go wrong?

WORKFLOW 2

Task

What starts it?

Steps, in order

Tools and systems it touches

Time each / how often

Where does it slow down, wait on someone, or go wrong?

WORKFLOW DEEP DIVE

continued

WORKFLOW 3

Task

What starts it?

Steps, in order

Tools and systems it touches

Time each / how often

Where does it slow down, wait on someone, or go wrong?

SORT YOUR TASKS

Look back at pages 2 to 5 and put each task in the bucket that fits best. Just the task name is enough.

KEEP *Only I should do this: relationships, judgment, negotiation*

AI DRAFTS IT *AI does the first version, I check it and send it*

AUTOMATE IT *It could run on its own with no one touching it*

HAND IT OFF *A teammate could do it with a clear process*

STOP DOING IT *Nobody would notice if it stopped*

YOUR TIME, BACK

What is this all for?

If you got five hours back every week, what would you do with them?

What parts of your work do you love and want to keep doing yourself?

What tools and apps do you use today? *(include AI tools you have tried)*

What worries you about using AI in your business?

Anything else we should know?

WHAT HAPPENS NEXT

Send this back when your week is done. We will go through it together, pick the first two or three wins, and build them into how you already work.