

Audit any business for AI in *one call*

Five questions to ask the owner. Write the answers in their words, not yours.

1 Where does the time go

Top 3 things still done by hand every week. Rank them by hours.

ASK: What do you or your team still do by hand every week, and how many hours does each take?

Notes _____

2 What systems are already running

Email and docs (Google Workspace or Microsoft 365), CRM, accounting, calendar and phone, inbox.

ASK: Which tools do you use for each, who pays for them, and who logs in?

Notes _____

3 Where does the data live

Sort it into three piles: clean, messy, fix first.

ASK: Where is this information kept today, and who owns each file?

Notes _____

4 How big is this, really

Solo plan or team plan.

ASK: How many people will use this every week?

Notes _____

5 What does done look like

One sentence outcome in the owner's words.

ASK: If this worked, what would be different in one sentence?

Notes _____

One-page systems map

One row per time drain from question 1. Fill it in during or right after the call.

Time drain	Systems it touches	Data it needs (clean, messy, fix first)	Team size	Done looks like

TIP Circle the row with the most hours and the cleanest data. That is the one to fix first.

Four checks before you *pitch*

PROPOSAL OUTLINE

- ☐ **Features:** What the AI must do.
- ☐ **Feasibility:** Which of their current tools it plugs into.
- ☐ **Frameworks:** The steps, training and rules you use every time.
- ☐ **Fail-safes:** what happens when it is wrong, who reviews it, and how client data stays locked down.

brief-prompt.txt

- B** **Background:** I just ran an AI audit call with a [type of business]. My notes: [paste notes, names removed].
- R** **Role:** Act as an AI implementation consultant for small businesses.
- I** **Instructions:** Pick the one time drain to fix first. Map it to their current tools and data.
- E** **Examples:** Done looks like: reply to every new lead in under a minute.
- F** **Final output:** A one-page proposal: Features, Feasibility, Frameworks, Fail-safes.

Ask me any questions you need answered before you start.

FIRST Remove names and private details from your notes before you paste them into any AI tool.

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