STEP-BY-STEP GUIDE

AI Business Audit

For SMBs & Consultants

Map every process. Find every bottleneck.
Deploy AI where it pays.
Measure the savings. No code required.

BEGINNER FRIENDLY · 3–4 HOURS · MIRO + ZAPIER + AI · FREE TO START

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Use AI to enhance yourself, not replace yourself.

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01 -- THE GAME PLAN

Turn your business into an AI-powered machine.

Imagine going back ten years with ChatGPT and no one else had it. That competitive advantage exists right now -- for businesses that know how to implement AI correctly. Most don't. That's the gap this guide closes.

This is a practical, click-by-click audit process. You'll map your business processes, find the highest-value problems, and deploy AI automations that save real time and money -- without writing a line of code.

What you'll build

- **Step 1** A visual map of every core business process in Miro
- **Step 2** A prioritised list of high-value problems backed by data
- **Step 3** A live AI automation -- deployed, tested, and tracked

Who this is for

- ✓ Business owners who know AI matters but don't know where to start
- ✓ Consultants helping SMBs implement AI and wanting a repeatable framework
- ✓ Professionals who want to spot automation opportunities and prove ROI
- ✓ Non-technical people -- no coding needed, ever

NOTE -- HOW LONG DOES THIS TAKE?

The full audit takes 3–4 hours spread across a few sessions. Each step is self-contained. The first automation is usually live within 48 hours of completing Step 2.

The implementation gap

Only 29% of small and medium businesses are using AI effectively. The gap isn't knowledge -- it's implementation. Most owners know AI is useful. They just don't know which process to automate first, which tool to use, or how to measure whether it's working. This guide solves all three problems, in order.

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02 -- WHAT YOU NEED

Tools & Requirements

TOOL	COST	WHAT IT'S FOR
Miro	Free	Visual mapping tool. Create an account at miro.com -- free plan gives you 3 boards, which is all you need.
Google Workspace	Free	Docs, Sheets, Slides, and Forms are used across Steps 2 and 3. A free Google account covers everything.
ChatGPT or Claude	Free / £18/mo	For testing and refining prompts in Step 3. The free tier works fine for sandbox testing.
Zapier	Free tier	No-code automation tool. Free tier supports 5 Zaps with 100 tasks/month -- enough for your first automation.
OpenAI / Anthropic API	Pay-as-you-go	Only needed in Step 3 when you connect Zapier. Costs pennies per document processed.

TIP -- START WITH JUST MIRO AND GOOGLE

You don't need an API key or Zapier account to get through Steps 1 and 2. Get your process map done first. You'll only need the API and Zapier when you're ready to deploy in Step 3.

What you'll download

- Process Map Template (Miro) -- pre-built board with labelled frames for each department
- ROI Quick-Calc Spreadsheet (Google Sheets) -- formula-driven, just fill in your numbers
- AI Toolbox Matrix (PDF) -- maps common business problems to the best AI tool
- Prompt Template (Google Docs) -- the CLEAR framework, ready to fill in
- SOP Blueprint (Markdown) -- for documenting your first automation

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03 -- STEP 1

Map Your Business Processes

Before you can improve anything, you need to see everything. This step turns all the tasks that run your business into a clear, shareable visual map. It takes about 30 minutes and you only do it once.

■ TIP -- WHERE TO FOCUS FIRST

Don't try to map everything at once. Start with revenue-generating processes: Sales, Marketing, Lead Generation. These move the needle. You can expand to other departments later.

STEP 01

Create a Miro account

Go to miro.com and click Sign up for free. Choose Continue with Google. Authorise Miro. You'll land on the Miro Dashboard. The free plan gives you 3 editable boards -- all you need.

STEP 02

Create your process map board

From the dashboard, click + New Board. Name it My Business Process Map. An empty canvas opens. This is where you'll map every department.

STEP 03

Add a flowchart template

On the left toolbar, click the Templates icon (grid shape). Search for flowchart and press Enter. Click Use template on the Basic Flowchart option. The template loads onto your canvas -- replace the placeholder boxes with your actual business steps.

STEP 04

Add a frame for each department

Click the Frame tool (rectangle icon, top-left). Draw a frame in the top-left area. Double-click the title and rename it Marketing Funnel. Repeat to create frames for: Sales & Orders, Customer Support & Onboarding, and Finance & Reporting.

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Mapping each department

■ Marketing Funnel

1. Inside the Marketing Funnel frame, delete any default shapes.
2. Add 4 rectangles vertically (Shape icon → Rectangle).
3. Label them: Awareness, Lead Capture, Nurture, Conversion.
4. Add sub-labels: Awareness = Ads, social, SEO. Lead Capture = Landing page, form. Nurture = Email sequence. Conversion = Checkout.
5. Connect them with arrows using the Connector tool.

■ Sales & Orders

1. Add a new frame to the right, name it Sales & Order Ops.
2. Use the Swimlane stencil (Shapes → Swimlane). Create 3 lanes: Lead, Quote, Close.
3. In each lane add one rectangle: Lead = Qualify & assign. Quote = Generate proposal. Close = Send contract & collect payment.
4. Connect the lanes in order with arrows.

■ Customer Support & Onboarding

1. Add a frame below, name it Support & Onboarding.
2. Create a vertical flow: Ticket Received → Triage → Resolution → Follow-up Survey.
3. Add a Sticky Note to each box noting which tool handles it (e.g. Zendesk, Email inbox).

■ Finance & Reporting

1. Add a frame at the bottom right, name it Finance & Reporting.
2. Create a linear flow: Invoice Creation → Payment Collection → Reconciliation → Financial Report.
3. Drag a screenshot of your accounting software onto the board to show where the data lives.

STEP 05

Share your map with the community

Click Share in the top-right corner of the board. Set Anyone with the link to Can view. Press Copy link. Post the link in your community's #audit-submissions channel. Sharing creates accountability and lets others spot blind spots.

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■ NOTE -- DONE IS BETTER THAN PERFECT

A rough map of how things actually work today is 100× more useful than a polished version of how you think they should work. Honest beats perfect.

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04 -- STEP 2A

Spot the Bottleneck

The 3-Question Quick-Scan

You've mapped your processes. Now scan each step for signs of waste. This takes about 15 minutes and produces a clear list of the highest-impact problems to tackle with AI.

The three questions

Q1	Does this step take more than 5 minutes each time?
Q2	Is this step performed more than 3 times per day?
Q3	Do you or your team feel frustrated doing this step?

STEP 01

Add sticky notes to your Miro board

Click the Sticky Note icon (yellow square) in the left toolbar. Double-click it and type: Q1: Does this step take more than 5 minutes? Copy it twice (Ctrl+C, Ctrl+V) and edit for Q2 and Q3.

STEP 02

Answer Yes or No on every step

Drag the three sticky notes onto the first box in your flowchart. Click each sticky and type Yes or No based on your real experience. Repeat for every box in every department frame.

STEP 03

Filter and tag the high-impact steps

Click the Search bar at the top of Miro and type Yes. Miro highlights every sticky with a Yes answer. For each highlighted box, click the Tag icon in the top menu, create a tag called High-Impact, and choose red.

STEP 04

Export your high-impact list

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Select all red-tagged boxes. Click Export → Image (PNG). Check Only selected objects. Name the file High-Impact-Steps.png and download it. This is your shortlist for the next step.

■ TIP -- BE HONEST, NOT OPTIMISTIC

Answer based on how things actually work today, not how you'd like them to work. Steps that feel slightly annoying often turn out to be the biggest time sinks across a week.

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05 -- STEP 2B

Build a Pain-Point Heat-Map

Colour-code your flowchart by severity

The heat-map turns your bottleneck list into a visual severity scale -- so you can see at a glance which steps are critical versus minor. This makes the prioritisation step much faster.

COLOUR	SEVERITY	CRITERIA
■ Red	**Critical**	3 Yes answers -- high frequency + high pain + long duration
■ Orange	**Moderate**	2 Yes answers
■ Green	**Low**	1 Yes answer

STEP 01

Add colour stickers to your Miro board

Click the Sticker icon on the left toolbar (smiley face). For any step with 3 Yes answers, drag a Red sticker onto the box. 2 Yes answers = Orange. 1 Yes answer = Green.

STEP 02

Create a legend

Click Text on the left toolbar. Click anywhere on the canvas and type: Red = Critical / Orange = Moderate / Green = Low. Place it in the top-right corner of the board.

STEP 03

Document it

Press Cmd+Shift+4 (Mac) or Print Screen (Windows) and capture the full board. Open a new Google Doc, paste the screenshot, and title it: Heat-Map Summary -- [Your Company].

STEP 04

Share for feedback

In the Google Doc, click Share → set Anyone with the link can view → copy the link. Post it in the community's #heat-map-reviews channel: "Heat-map of my process. Red areas are the

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biggest pain. Feedback welcome."

NOTE -- IF YOU'RE UNSURE ABOUT SEVERITY

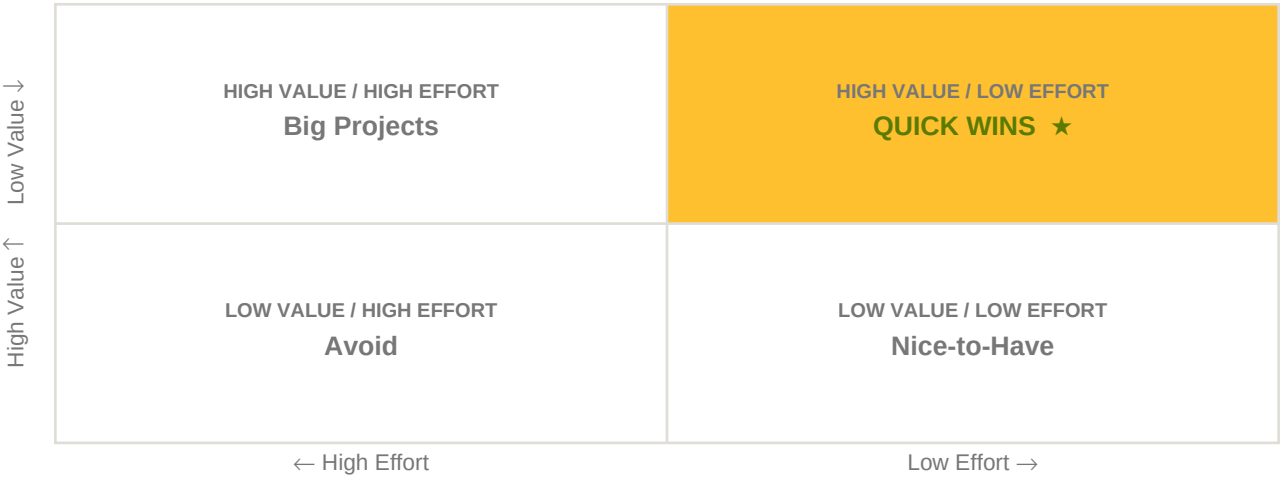
Put Red on every high-impact step from the previous scan and refine later.
It's easier to dial back than to find problems you missed.

06 -- STEP 2C

The Value-Effort Matrix

Prioritise with a 2×2 grid

The matrix shows which problems to tackle first. The best automation targets are high-value AND low-effort -- the quick wins that save real time without requiring a developer. This step takes 20 minutes.



STEP 01

Open Google Slides and create the matrix

Go to slides.google.com and click Blank. Rename the file to Value-Effort Matrix -- [Your Company]. From the top menu choose Insert → Table → 2×2. A blank grid appears on the slide.

STEP 02

Label the axes

Click the left column header and type Effort. Click the right column header and type Value. Add text boxes: Low Effort → High Effort running left-to-right along the bottom. High Value → Low Value running top-to-bottom on the left.

STEP 03

Place your problems in the right quadrant

For each red-tagged step from the heat-map, ask: how much effort to automate? (Low = prompt only, High = developer work.) And how much time/money does fixing this save? Place

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the step name as a text box in the matching quadrant.

STEP 04

Highlight quick wins and export

Select the top-right quadrant (High Value / Low Effort). Click Shape fill and choose light blue. Export as PDF: File → Download → PDF Document. Save as Prioritised-Problems.pdf.

■ TIP -- START WITH YOUR TOP 3

Pick the 3–5 red steps from the heat-map and place them in the matrix. That's enough to make a clear prioritisation decision. You can fill in the rest later.

07 -- STEP 2D

Ask the Team: Mini-Survey

Get pain scores from the people doing the work

Your map is your perspective. The people who actually do the work often spot friction you can't see from above. This step embeds a single-question Google Form into each process step so your team can rate the pain. Takes 15 minutes to set up.

STEP 01

Create a Google Form

Go to forms.google.com and click Blank. Title the form: Process Pain Survey -- [Your Company]. Click Untitled Question and replace it with: On a scale of 1–5, how painful is this step for you? Change the answer type to Linear scale (1 = Not painful, 5 = Very painful). In Settings, turn off Collect email addresses to keep responses anonymous.

STEP 02

Get the form link

Click Send at the top right. Click the Link icon. Enable Shorten URL. Copy the short URL.

STEP 03

Embed the link into each Miro step

Go back to Miro. Select a red-tagged box (e.g. Create Invoice). Click the Link icon in the top toolbar. Paste the Google Form URL and press Enter. A chain-link icon appears on the box. Repeat for every red-tagged step.

STEP 04

Invite your team

Share the Miro board (Share → Can comment). Post in your team chat: "Can you click the link icon on each step of our process map and rate how painful it feels (1–5)? Takes 2 minutes."

STEP 05

Review and export the results

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In Google Forms, click the Responses tab. You'll see average ratings per step. Click the three-dot menu → Download responses (.csv). Steps with average scores above 3.5 are your validated pain points.

■ NOTE -- ANONYMOUS BEATS ACCURATE

People rate pain more honestly when their name isn't attached. Keep the form anonymous and you'll get more useful data. A person who rates everything a 5 still tells you something -- that person is overwhelmed.

08 -- STEP 2E

The ROI Calculator

Turn hours saved into pounds earned

You now have team-validated pain scores. Before you deploy anything, you need a business case. This spreadsheet formula projects how much money each automation could save per week. Ten minutes of maths that justifies every decision in Step 3.

STEP 01

Create the spreadsheet

Open a new Google Sheet at sheets.google.com. Rename it: AI ROI Quick-Calc -- [Your Company]. In Row 1, add these column headers:

```
A1: Problem
B1: Current Time per Occurrence (min)
C1: Occurrences per Week
D1: Estimated Time Saved (%)
E1: Hourly Labour Cost (£)
F1: Weekly Savings (£)
```

STEP 02

Enter your first problem

Using invoice data extraction as an example, fill in Row 2:

```
A2: Invoice Data Extraction
B2: 15     (step takes 15 minutes)
C2: 5      (done 5 times a week)
D2: 80     (80% time reduction expected)
E2: 30     (£30 hourly labour cost)
```

STEP 03

Add the savings formula

Click cell F2 and type:

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```
=(B2/60) * C2 * (D2/100) * E2
```

B2/60 converts minutes to hours. Multiply by C2 for total hours per week. Multiply by D2/100 for the percentage saved. Multiply by E2 to convert to pounds. Press Enter -- for the example above you should see £150.

STEP 04

Add all your problems and sum the total

Drag the formula down to cover all your problem rows. In the row below the last entry, type Total Weekly Savings in column E and =SUM(F2:F10) in column F. This gives you combined projected savings across all automation targets.

■ TIP -- BE CONSERVATIVE WITH ESTIMATES

Use 70–80% for time saved rather than 100%. AI automations rarely eliminate all manual work. A conservative estimate that you beat is more credible than an optimistic one you miss.

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09 -- STEP 3

Deploy Your First AI Solution

You have a prioritised problem and a projected ROI. Now use AI to research the best solution for your specific situation -- then deploy it. This is a two-part step: deep research first, then build.

STEP 01

Use AI deep research to find the best solution

Before you pick a tool or write a prompt, let AI do the heavy lifting. Take the problem statement from your Value-Effort Matrix and paste it into a deep research tool. This produces a tailored recommendation -- not a generic answer -- based on your specific workflow, volume, and technical constraints.

Which tool to use for deep research

TOOL	BEST FOR	WHERE TO START
Gemini Deep Research	Comprehensive multi-source synthesis, business context	gemini.google.com -- click Deep Research
Perplexity Pro (Deep Research)	Fast, cited sources, good for tool comparisons	perplexity.ai -- toggle Deep Research mode
ChatGPT with web browsing	Familiar interface, strong reasoning on complex setups	chatgpt.com -- use GPT-4o with Browse enabled
Claude (extended thinking)	Nuanced analysis, great at comparing trade-offs	claude.ai -- use latest Sonnet or Opus model

The deep research prompt -- copy, fill in, paste

Open your chosen deep research tool. Paste this prompt exactly, replacing the bracketed fields with your actual audit data:

■ DEEP RESEARCH PROMPT -- COPY & PASTE INTO GEMINI / PERPLEXITY / CHATGPT / CLAUDE

I have identified a high-value business problem through an AI audit. I need you to conduct deep research and recommend the best AI solution available today.

■ SECTION 1 -- THE PROBLEM

Process name: [e.g. Invoice Data Extraction]. What happens now: [e.g. A staff member opens each PDF invoice, manually copies supplier name, date, line items and total into a Google Sheet. Takes 15 minutes per invoice, done 5 times a day.]. Pain points: [e.g. Errors from manual entry, slow turnaround, staff find it tedious]. Volume: [e.g. ~25 invoices per week, growing]. Technical environment: [e.g. We use Google Workspace, Xero for accounting, no developer on the team].

■ SECTION 2 -- WHAT I NEED FROM YOU

Please research and recommend: 1. The best AI automation solution for this specific problem as of today. Consider all options including: no-code tools (Zapier, Make.com, n8n), AI agent platforms (Manus, Claude Cowork), AI coding tools (Claude Code, Cursor), and custom LLM integrations (GPT-4o, Claude, Gemini APIs). 2. A clear comparison of the top 2-3 options -- pros, cons, cost, setup complexity, and maintainability. 3. A step-by-step implementation path for the recommended solution. 4. Any newer tools or approaches released in the last 6 months that are particularly well-suited to this problem. 5. Realistic time and cost estimates for a non-technical business owner.

■ SECTION 3 -- CONSTRAINTS & PREFERENCES

Technical skill level: [none / basic / intermediate]. Budget: [e.g. under £100/month for tooling]. Preference: recommend the best solution regardless of brand -- I am not tied to any specific AI provider. Prioritise reliability and ease of maintenance over cutting-edge complexity.

■ TIP -- LET THE RESEARCH SURPRISE YOU

Do not assume Zapier is the answer before you run the research. Depending on your problem, Manus or Claude Cowork might build an autonomous agent that handles the whole workflow. n8n might be cheaper and more flexible. The deep research step exists precisely because the best tool changes as AI evolves.

What the research will give you

- ✓ A ranked recommendation with clear reasoning (not just a list)
- ✓ A comparison of the top 2-3 options with pros, cons and costs

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- ✓ A step-by-step implementation guide written for your skill level
- ✓ Awareness of any new tools released since your last research
- ✓ Realistic time estimates so you can plan the build session

■ NOTE -- ABOUT THE TOOL LANDSCAPE

The AI tool landscape moves fast. What was best six months ago may not be best today. This is why the prompt explicitly asks for current recommendations and recent releases. Run fresh research for each new problem you tackle -- do not recycle old recommendations.

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Common AI Solution Types

Your deep research will return a recommendation. This reference table helps you understand what each tool type is and when it is the right fit.

SOLUTION TYPE	TOOLS	BEST WHEN	SKILL NEEDED
No-code automation	Zapier, Make.com, n8n	Connecting existing apps, simple trigger-action workflows, no custom logic	None
AI agent platform	Manus, Claude Cowork	Multi-step tasks that require judgment, browsing, or file handling -- not just data passing	None to basic
AI coding assistant	Claude Code, Cursor	Building a custom script or lightweight app -- faster than hiring a developer	Basic comfort with terminal
Direct LLM API	GPT-4o, Claude, Gemini APIs	Custom processing inside a larger workflow -- used inside Zapier, n8n, or custom code	Basic to intermediate
Self-hosted automation	n8n (self-hosted)	Higher volume, cost sensitivity, or data-privacy requirements	Intermediate

■ **NOTE -- NO SINGLE RIGHT ANSWER**

The right tool depends on your problem, your team, your budget, and what has launched this month. That is exactly why you run deep research first rather than defaulting to the most popular tool you have heard of.

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STEP 02

Build the recommended solution

Your deep research output will contain a specific implementation guide. Follow it. The general pattern is the same regardless of which tool is recommended:

- **Create your accounts and get API keys** — Sign up for whichever tool was recommended. If an LLM API is involved (OpenAI, Anthropic, Google), go to the provider developer and create an API key. Store it securely -- do not paste it into public documents.
- **Run a sandbox test first** — Before connecting anything to live data, test the core AI step in isolation. Open the AI tool in a browser, paste a sample input, and confirm the output is correct. Fix the prompt until the output is clean.
- **Build the automation trigger** — Set up the trigger that starts the workflow -- a new file in a folder, a new row in a spreadsheet, a new email arriving. Most no-code tools have a Test Trigger button. Use it before moving on.
- **Connect the AI processing step** — Add the AI step to the workflow. Paste in your tested prompt. Map the trigger output (e.g. file content, email body) to the prompt input. Run a test with real data.
- **Add the output step** — Route the AI response to wherever the result needs to go -- a spreadsheet, a CRM, a Slack message, a database row. Map each field. Test again.

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■ **Turn it on and monitor for 48 hours**

Activate the automation and watch the first real runs carefully. Check every output against the input. Fix any edge cases you find before declaring it done.

■ **TIP -- DOCUMENT AS YOU BUILD**

Open a Google Doc alongside your build session. Paste in your prompt, screenshot each step, and note any decisions you made. This becomes your SOP. Without it, you will not remember how you built it when something breaks in three months.

STEP 03

Write and refine your AI prompt

Whatever tool you are using, if it involves an LLM, you need a well-structured prompt. Your deep research will provide a starting draft. Refine it using this four-section framework:

■ **PROMPT -- SECTION 1 -- ROLE / CONTEXT**

Describe what the AI is. Example: You are an AI assistant that extracts structured data from supplier invoices.

■ **PROMPT -- SECTION 2 -- TASK**

State exactly what to do and what fields to extract or produce. Be specific about names, formats, and data types.

■ **PROMPT -- SECTION 3 -- OUTPUT FORMAT**

Specify the exact format you need. Example: Return valid JSON only, using these exact keys: supplier_name, invoice_date (YYYY-MM-DD), total_amount.

■ **PROMPT -- SECTION 4 -- CONSTRAINTS**

Cover edge cases. Example: If a field cannot be found, return null. Do not include explanations, comments, or markdown formatting.

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TIP -- TEST WITH 5 REAL EXAMPLES BEFORE GOING LIVE

Run your prompt against 5 real inputs from your business. Check every field in every output. If anything is wrong, fix the prompt and re-test all 5. Only go live once all 5 pass cleanly.

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STEP 04

Measure your actual results

Open the ROI Quick-Calc spreadsheet from Step 2E and add a second tab called Weekly Metrics. Add these columns:

```
A1: Week Starting   =TODAY()-WEEKDAY(TODAY(),2)+1
B1: Items Processed =COUNTIFS(Sheet1!D:D,"Yes")
C1: Weekly Savings  =B2*(mins/60)*pct_saved*hourly_rate
```

Replace time_per_item, time_saved_pct, and hourly_rate with the figures from your ROI calc. Compare Weekly Savings to your Projected Weekly Savings figure. If actual meets or beats projected, the automation is delivering. Share results in the community #impact-reports channel.

What to do if results fall short

- **Refine the prompt** — Add a clarifying sentence for any field the AI is missing. Re-test against 5 examples before updating the live automation.
- **Add a human-in-the-loop fallback** — Configure a fallback step: if the AI output is empty or contains null values, route the item to a Slack message or email for manual review. This prevents bad data reaching downstream systems.
- **Re-run deep research** — If the recommended tool turns out to be the wrong fit, go back to Step 01 and run the deep research prompt again -- this time with the specific failure mode included in the problem description.

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10 -- KEEP STACKING

What to Do Next

You've completed the audit loop once. Now you do it again -- for the next problem in your matrix. Each automation you deploy compounds. The more you stack, the more of your business runs on autopilot.

- **Move to the next problem** — Return to the Value-Effort Matrix and work through the next item in the top-right quadrant. Run Steps 3A–3D for that problem. Most businesses have 5–10 automatable processes -- the first one is always the hardest.
- **Connect more tools to your pipeline** — Zapier connects to 6,000+ apps. Once you're comfortable with one workflow, try: CRM integration (HubSpot, Salesforce), email automation (Gmail), project management (Asana, Notion), or customer support (Zendesk, Intercom).
- **Document every automation as an SOP** — Every time you build a new Zap, create a Standard Operating Procedure in Notion or Confluence. Include: the prompt, the Zapier steps, the QA checklist, and the weekly metrics formula. This lets you delegate the maintenance.
- **Share ROI reports with stakeholders** — A report showing £2,400 saved per month is a better sales pitch than any case study. Export the Weekly Metrics tab monthly and include it in your client reports or board updates.

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■ **Build the community feedback loop**

Post your automation results in the community. Share what worked, what didn't, and what surprised you. The more members contribute, the faster everyone learns.

■ **REMEMBER -- VIEWS DON'T PAY BILLS. VALUE DOES.**

Every automation you deploy is value. Real, measurable, repeatable value. The businesses winning right now aren't the ones talking about AI the most -- they're the ones implementing it first.

Quick Reference -- The Full Audit at a Glance

SECTION	TOOL	OUTPUT	TIME
1 -- Map Processes	Miro	Visual process map	30 min
2A -- Bottleneck Scan	Miro sticky notes	High-impact step list	15 min
2B -- Heat-Map	Miro stickers	Severity colour map	15 min
2C -- Value-Effort Matrix	Google Slides	Prioritised problem list	20 min
2D -- Team Survey	Google Forms + Miro	Pain scores per step	15 min
2E -- ROI Calculator	Google Sheets	Weekly savings forecast	10 min
3A -- Pick AI Model	API provider site	API key	10 min
3B -- Write Prompt	Google Docs	Production-ready prompt	20 min
3C -- Build Zap	Zapier	Live automation	45 min
3D -- Measure Results	Google Sheets	ROI comparison report	10 min

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