

The AI Opportunity Audit

A practical workbook for finding where AI can save your business 10 to 20 hours a week, and choosing the one task to automate first.

Who this is for

Founders and small teams who are busy, not technical, and tired of AI hype. No jargon. No 200-page strategy. Just a clear way to spot the work AI can take off your plate.

What you will do

- 1 Find**
List the repetitive work that quietly eats your week.
- 2 Score**
Rank each task by hours, repetition and risk.
- 3 Plan**
Choose one win and map out how to ship it.

How to use this workbook

Set aside twenty minutes. Work through the three steps in order, be honest, and keep your estimates rough. The aim is not a perfect plan. It is to leave with one task worth automating and a clear idea of how to start.

- 1 Find the opportunities**
Use the opportunity bank on the next page to jog your memory. Tick anything that sounds like your business. Most teams are surprised how much repetitive work they have once they look for it.
- 2 Score each candidate**
Put your ticked tasks into the scoring sheet. You will rate each one on how many hours it costs, how repetitive it is, and what happens if the AI gets it wrong. A simple score points you at the best first project.
- 3 Pick and plan your first win**
Choose the task with the most hours and the lowest risk, then fill in the one-page action plan. Shipping one small win builds momentum and pays for the next.

A note on expectations

AI is very good at the repetitive 80 percent of a task and still needs a human for the last 20 percent. Aim to remove the boring bulk, not the judgement. The best first projects are dull, frequent and low-risk. Save the ambitious ideas until you have a win or two behind you.

Where AI usually pays off

Tick every task that sounds familiar. Each tick is a candidate for the scoring sheet. This is not exhaustive, so add your own in the blanks at the end.

Admin & operations

- Re-keying data between systems and spreadsheets
- Formatting reports and tidying messy data
- Scheduling, reminders and chasing updates

Sales

- Researching leads and prospects before a call
- First drafts of proposals and quotes
- Writing and sending follow-up sequences

Finance & HR

- Pulling data from invoices and receipts
- Answering policy and benefits questions
- Drafting onboarding and process documents

Your own

- _____
- _____

Customer support

- Drafting first replies to common questions
- Tagging, routing and prioritising tickets
- Summarising long email or chat threads

Marketing & content

- Product descriptions and category copy
- Social posts, newsletters and ad variations
- Repurposing one long piece into many

Knowledge work

- Summarising documents and research
- Turning notes into clean SOPs
- Capturing meeting actions and decisions

Score your candidates

List your ticked tasks below. Score each from your gut, then work out a priority. Hours is your weekly estimate. Repetition and Risk are 1 to 5.

Priority = Hours × Repetition ÷ Risk. Higher is better. Start with the highest priority you are comfortable trusting.

Task	Hrs / wk	Repeat (1-5)	Risk (1-5)	Priority

Plan your first win

Take your top-scoring task and commit it to paper. Keep it small enough to ship in days or weeks, not months.

The task we are automating

What “done well” looks like (one sentence)

How we will measure success (hours saved or money)

What could go wrong, and the human check that catches it

Who owns it

The very first step, this week

Target ship date

Before you start: three traps to avoid

! Do not automate a broken process

If a workflow is a mess, AI just makes the mess faster. Tidy the steps first, then automate the tidy version.

! Do not start with high-risk, low-frequency work

Rare tasks where a wrong answer is expensive are the worst place to begin. Pick something frequent and forgiving.

! Do not buy a tool before you have defined the job

The task comes first, the tool second. If you cannot describe the outcome in a sentence, you are not ready to buy anything.

Want us to do this with you?

Book a free 15-minute strategy call. We will work through your scoring sheet, pick the quickest win, and give you a fixed price on the spot. No pitch, no pressure, just a straight answer on what is worth doing.

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