



FREE WORKSHEET

The AI opportunity self-check

A 20-minute walk through your own operation. Sort each task into five buckets and you will know where AI helps, where it does not, and what to fix first.

This is the same triage we use in a Trailpoint AI Opportunity Audit. The difference is that we do it with interviews across your team and put a dollar figure on each item. This version gets you started on your own.

Before you start

List the main jobs your business does to make money and keep clients happy. Ten to fifteen is plenty. Think in verbs: quote a job, order materials, schedule crews, invoice, follow up, handle a complaint, report numbers.

For each one, ask two questions: how much time does it eat each week, and how often does it go wrong. Those two answers drive everything below.

The five buckets

Sort every task into one bucket. Force the choice.

1 Automate or AI. Repeats often, follows rules, does not need your judgment on every case. Your candidates. Examples: turning site notes into a first-draft proposal, sorting inbound email, chasing an unpaid invoice, pulling weekly numbers into one place.

2 Bottleneck. A step where work piles up and waits. Often a person everything routes through, or a handoff between two people. AI sometimes helps, but often the real fix is a process change. Name it before you buy anything.

3 Digital asset to build. Knowledge that lives in one person's head and should live in a system everyone can reach. A pricing method. A checklist a senior person runs by memory. Writing it down protects you when that person is out.

4 Keep human. Judgment, relationships, and anything where a wrong answer is expensive. Pricing a tricky job. Handling an upset client. Deciding who to hire. Protect these.

5 Eliminate. Things nobody should be doing at all. A report no one reads. A step that exists because it always has. Cut these before you automate anything, or you will automate waste.

The worksheet

Task	Hours / week	Goes wrong? (L/M/H)	Bucket (1-5)	First thought on the fix

Reading your results

Bucket 1, sorted by hours. The task at the top, high hours and rules-based, is where you start. One task, trained properly, before you touch the next.

Bucket 5. Cut at least one thing this week. It costs nothing and clears room.

A rough savings estimate. Take the hours per week on your top bucket-1 task, multiply by the loaded hourly cost of whoever does it, then by 50 weeks. That is the annual number a fix has to beat to be worth doing. If a tool or a few hours of setup costs less, it pays for itself inside a year.

Want the full version? The Trailpoint AI Opportunity Audit does this across your whole team, separates what leadership thinks is happening from what staff actually does, and prices each opportunity against real labor cost. You get a ranked roadmap and an ROI figure, not a hunch. Reach us at info@trailpoint.ai.

Method note: the five-bucket triage adapts the "digital assets" idea from Daniel Priestley and an AI opportunity-assessment structure demonstrated by Andrew Dunn.