

AI Audit & Process Optimization Worksheet

Objective: Use this worksheet to assess your marketing and business processes, identify opportunities for AI optimization, and evaluate implementation risks.

Step 1: Identify Processes for AI Optimization

List the key processes in your marketing or business operations where AI could provide efficiency gains.

Process Name	Current Pain Points	AI Opportunities	Current Tools Used
Example: Social Media Scheduling	Time-consuming manual posting	AI-driven scheduling & optimization	Hootsuite, Buffer

Step 2: Evaluate AI Suitability

Assess each process based on how well AI could enhance it.

Process Name	Repetitiveness (High/Med/Low)	Time Savings Potential (High/Med/Low)	Risk Level (High/Med/Low)
Example: Content Creation Assistance	High	High	Low

Step 3: AI Implementation Plan

Develop a plan for integrating AI into the highest-priority processes.

Task	AI Tool/ Technology	Implementation Steps	Expected Benefits	Owner
Example: Automate Email Responses	ChatGPT-based AI	Set up workflow, train AI, test responses	Faster response time, reduced manual effort	Marketing Team

Step 4: Risk Mitigation & Quality Control

Consider the potential risks of AI implementation and plan for mitigation.

Risk Factor	Impact Level (High/Med/Low)	Mitigation Strategy
Example: AI-generated errors in customer communication	High	Implement human review for key messages

Step 5: Monitor & Optimize AI Performance

Set KPIs to track the effectiveness of AI implementation.

Metric	Baseline	Target	Review Frequency
Example: Time spent on email responses	10 hrs/week	4 hrs/week	Monthly

Next Steps: