

5-Minute Workflow Audit

Spot the fastest automation wins for your business in under 5 minutes.

Instructions

For each item, check **Yes** if this describes your current process. Total your Yes count at the bottom.

1. Document Handling

Do you manually retype data from emails, PDFs, or scanned documents?

- ☐ Yes — This is a quick automation win (OCR + data extraction)
 - ☐ No — Already automated or not applicable
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2. Client Intake

Do you copy/paste client info from one system to another during onboarding?

- ☐ Yes — Intake automation can save hours per client
 - ☐ No — Already automated or not applicable
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3. Document Chasing

Do you send manual reminder emails when clients forget to send documents?

- ☐ Yes — Automated follow-up sequences save 30+ min per client
- ☐ No — Already automated or not applicable

4. Report Generation

Do you manually compile data from multiple sources into reports?

- ☐ Yes — Automated reporting eliminates hours of copy/paste
 - ☐ No — Already automated or not applicable
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5. Approval Workflows

Do you route documents for approval via email chains?

- ☐ Yes — Workflow automation creates audit trails + speed
 - ☐ No — Already automated or not applicable
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Your Score

Total Yes marks: _____ / 5

What Your Score Means

ScoreRecommendation

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4–5 YesHigh automation potential. Start with intake or document handling. ROI visible in 1–2 weeks.

2–3 YesModerate opportunity. Pick the most painful process first. **0–1 Yes**You're already well-automated. Look for edge-case optimizations.

Next Steps

If you found at least one "quick win" on this checklist:

1. Pick the process that annoys you most
2. Document the current steps (even rough notes help)
3. Reply to the email that sent you this checklist with your process details

We'll point you to the 1–2 integrations that typically unlock the biggest ROI for your situation.

KernTech Solutions — Document Automation for Accounting Firms & MSPs kerntech.net