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AI Readiness Self-Assessment

Find your highest-value AI automation opportunity in 20 minutes

AN AI AUTOMATION GUIDE FOR

Operations Leaders

Three simple steps to identify your first AI automation.

Every business has processes that eat hours of manual work every week. This self-assessment helps you pick the right one to automate with AI in three simple steps, taking less than 20 minutes.

1. Identify the process with the greatest AI opportunity.
2. Map the process and identify the friction and opportunity.
3. Estimate what AI automation could save you in real dollars.

When you're done, you'll have a clear view of your AI automation opportunity.

Find the process with the highest automation potential.

Use the table below to list processes in which your team spends time on repetitive manual work. These could include order processing, customer onboarding, report generation, data entry, or compliance checking. Whatever they are, they should happen regularly and follow a roughly consistent pattern.

For each process, check which of the five automation signals apply. The more signals a process matches, the stronger the automation case.

- **Data Entry:** Your team manually moves information between systems, copies data from emails into a CRM, rekeys figures from one spreadsheet to another, or enters form data into a database.

- **Document Processing:** Your team reads documents to pull out specific information, such as scanning invoices for amounts, reviewing applications for fields, extracting contract terms, or classifying data.

- **Verification:** Your team verifies data against known standards, such as matching names across records, confirming totals, checking required fields, or flagging items outside acceptable thresholds.

- **Routing:** The bottleneck is getting the right information to the right person at the right time: assigning work, escalating issues, sending status updates, or triggering the next step in a workflow.

- **Reporting:** Your team assembles reports by pulling data from multiple sources, formatting it, and summarizing results. Weekly status reports, month-end reconciliations, compliance summaries, or management dashboards that require manual compilation.

Process Name	Data Entry	Processing	Verification	Routing	Reporting	Total
Process #1	☐	☐	☐	☐	☐	_ / 5
Process #2	☐	☐	☐	☐	☐	_ / 5
Process #3	☐	☐	☐	☐	☐	_ / 5
Process #4	☐	☐	☐	☐	☐	_ / 5

Your selected process: _____

Take this process into Step 2. Once you've completed the full assessment, you can come back and run Steps 2 and 3 for any other process on your list.

Walk through your process step by step.

For each step in your selected process, describe what happens, who does it, what system they use, how many minutes each step takes, and where errors or delays show up.

Step	What happens	Role(s)	System(s)	Time (mins)	Errors and delays
1	Describe what happens at this step.	Role(s)	System(s)	Mins	List errors and delays.
2	Describe what happens at this step.	Role(s)	System(s)	Mins	List errors and delays.
3	Describe what happens at this step.	Role(s)	System(s)	Mins	List errors and delays.
4	Describe what happens at this step.	Role(s)	System(s)	Mins	List errors and delays.
5	Describe what happens at this step.	Role(s)	System(s)	Mins	List errors and delays.
…	*Add extra steps as needed*				
		Total Time (mins)	Total Mins		

EXAMPLE

New policy application intake example

Here's how a typical policy intake workflow breaks down at a small insurance brokerage. Use this as an idea for mapping your own process.

Step	What happens	Who	System	Time (mins)	Errors and delays
1	*Receive application from client via email or phone*	CSR	Outlook	5	Applications sometimes missing key fields
2	*Enter applicant details into agency management system*	CSR	Applied Epic	10	Re-keying errors in names, addresses, or coverage amounts
3	*Request quotes from carrier portals*	Account manager	Carrier portals + rating spreadsheet	10	Each carrier has a different portal and format
4	*Compare quotes and prepare proposal for client*	Account manager	Excel + Word	10	Manual formatting takes time, inconsistent templates
5	*Submit binding request to selected carrier*	Account manager	Carrier portal	5	Missing signatures or documents delay binding
		Total Time (mins)	40		

Calculate what this process costs you today.

This worksheet calculates the labor cost of your process and provides a savings range. Estimates are fine where exact numbers aren't available.

YOUR INPUTS	
A. Monthly volume (how many times per month) *How many times does your team complete this process per month?*	
B. Minutes per completion *Total minutes from your Step 2 time column.*	
C. Loaded hourly rate *Base salary ÷ 2,080 hours, then add 30% for benefits.*	$
THE MATH	
D. Monthly hours = A × B ÷ 60 *Multiply volume by minutes, then divide by 60 to convert to hours.*	
E. Annual hours = D × 12	
F. Annual labor cost = E × C *What this process costs in people-time per year.*	$
YOUR SAVINGS RANGE	
Conservative estimate (60% of F) *If only the most routine steps are automated.*	$
Aggressive estimate (90% of F) *If the full process is automated end-to-end.*	$

Realistic AI automation typically recovers 60% to 90% of labor costs, depending on how much of the process is fully versus partially automated. The conservative end assumes only the most routine steps are automated. The aggressive end assumes the full workflow is handled by AI with human oversight on exceptions only.

> ## Where do you reallocate the reclaimed time and expense?
>
> Automation directly reduces labor cost, and that reduction is the core ROI. What your team does with the reclaimed time can increase that return further. Think about three destinations for the hours you reclaim.
>
> - **Revenue-producing work.** Sales outreach, customer acquisition, retention, upselling. If your team is spending hours on data entry instead of talking to customers, this reallocation case is obvious.
> - **Higher-value operational work.** Complex cases, exception handling, strategic projects, quality improvement. The work that requires judgment and currently gets squeezed by routine tasks.
> - **Innovation and improvement.** New products, better customer experiences, process improvements, or strategic initiatives that never get prioritized because the team is buried in routine work.

You've found the opportunity for one process. Now imagine having the plan to implement it.

What you've built here is a starting point: one process mapped, automation signals identified, and a rough savings range. Our full AI Readiness Assessment takes it to the next level, delivering a complete ROI model, an AI implementation roadmap, and a comprehensive assessment of your AI maturity.

Here's how the two compare.

	This self-assessment	Full assessment
Automation Opportunity	One process	Every process worth automating
Process mapping	You fill it in	We map it with you, step by step
Automation scoring	You check the boxes	We score each process for automation fit
ROI Model	Back-of-envelope savings range	Full financial model with labor, error, and throughput costs
AI maturity assessment	Not included	Where you stand today and what to do next
Implementation roadmap	Not included	What to build, in what order, with timelines and targets

Send us your completed assessment for a complimentary review.

Email this document to **hello@exacttempo.com** and we'll review it at no cost. We'll answer your questions, share where we see the biggest opportunities, and discuss whether a full assessment makes sense for your business.

Everything we produce in the full assessment is yours to keep, whether you move forward with us or not. Book a call to walk through it together: **exacttempo.com/book-a-call**

About ExactTempo
ExactTempo builds and manages custom AI automation for small and mid-sized businesses. We take the repetitive manual work off your team's plate, from data entry and document processing to reporting and coordination, and replace it with AI agents designed around your business. Your team gets back the time and budget to invest in growth without adding headcount. You own everything we build, and we run it for you to ensure your AI scales with your growth.

Learn more at exacttempo.com