



THE MID-YEAR AI AUDIT

One-page worksheet · From Hype to High-Performance

Apex AI Advisors
EO Nashville · Strategic Alliance Partner

1 Inventory & price the hours

List up to three tasks that eat 2+ hours per person per week. Annual cost = hrs/wk × loaded \$/hr × 52.

TASK	WHO OWNS IT	HRS / WK	LOADED \$ / HR	ANNUAL COST
A. _____	_____	_____	_____	_____
B. _____	_____	_____	_____	_____
C. _____	_____	_____	_____	_____

2 Score the traits

Check each trait that applies to the task. Three or more checks = a pilot candidate.

TASK	REPETITIVE <i>same steps every time</i>	RULES-BASED <i>you could write the checklist</i>	HIGH-VOLUME <i>hours × people × weeks</i>	VERIFIABLE <i>human can approve fast</i>	SCORE / 4
Task A	☐	☐	☐	☐	_____
Task B	☐	☐	☐	☐	_____
Task C	☐	☐	☐	☐	_____

3 Grade the data (for your pilot candidate)

AI can only work with what it can find — the same is true of a new hire.

Could a smart new hire find everything needed to do this task? ☐ Yes ☐ No → fix that first

Where does the information actually live? _____

4 Pilot one workflow — two weeks

One process, one owner, a human approving every output. Not a committee. Not a platform decision.

Workflow: _____ Owner: _____ Start date: _____

Who approves each output before it counts? _____

5 Keep or kill — the 30-day review

Measured against the baseline from step 1. Dollars and hours, not vibes.

Baseline annual cost: \$ _____ Hours saved / wk: _____ Dollars saved / yr: \$ _____

Verdict: ☐ Keep & scale — pick the next task ☐ Kill without guilt — pick the next task

Notes — the one process I'm auditing this month

What it is, who owns it today, and what a win would look like in dollars.

GUARDRAILS

A human approves anything that leaves the building · least-privilege access · verify numbers against source · document the process before you automate it.

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