AI OPS AUDIT - RUN SHEET

The 30-minute working session, captured.

WHAT THIS IS

The run sheet Clearfield walks through on every 30-minute AI Ops Audit. We use it live with you on the call. Pre-fill before; reference during; it becomes the scoped agreement you walk away with.

PAGES IN THIS RUN SHEET

HOW TO USE IT

1. Print or open on a second screen. First half is a checklist; second half is a worksheet you fill in during the call.
2. Bring whatever you have, even rough numbers. We do not need a polished inventory; we need the truth of where you are.
3. At the end of 30 minutes you will have:
   - A stack map you can show your CFO
   - A workflow scorecard with two flagged for first action
   - A written ROI range, low / mid / high
   - A recommended next step: build, buy, or partner with us

01 - Pre-call intake

Fill out before the call. Send to your Clearfield operator at least 24 hours ahead.

COMPANY

Company name (e.g. Northwind Holdings)

Approx FTE count ____ Industry ____ Annual revenue band ____

Named contact, title, and time in role

WHAT BROUGHT YOU HERE

In one sentence, what was the moment that made you book this call?

WHAT HAVE YOU ALREADY TRIED

List any AI tools, automations, or consultants you evaluated or bought in the last 12 months. Include tools you stopped using - those answers matter too.

WHAT WOULD MAKE THIS CALL A WIN

What is the one outcome, if we hit it in 30 minutes, that justifies the next step?

02 - Stack mapping

Every paid tool you touched in the last 90 days. Skip line items under $50/mo.

COLUMNS WE FILL ON THE CALL (TOOL | WHO USES IT | WHAT IT DOES | ANNUAL $ | REPLACE?)

List every tool your team uses, then we score replace/keep during the call.

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REPLACE scoring is done live: green = retire, yellow = consolidate, red = keep and build around.
Bring a rough dollar figure - even ballpark. We refine during the scoring, not before.

03 - Workflow audit grid

Pick your top five ops workflows. Score each row 0-3 in every column.

RUBRIC

0 = unknown / unmapped 1 = informal / tribal 2 = documented but not measured

#	WORKFLOW	OWNER	HRS/WK	ERR %	OWNED	MEAS	AI
01							
02							
03							
04							
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TRIGGER: any workflow with OWNED < 2 OR MEAS < 1 is flagged for week-one action.
AI = 3 means a junior could rebuild it under our model in 2 weeks. We will tell you which.

04 - ROI + path forward

The estimate we run together in the last ten minutes of the call.

INPUTS

Hours reclaimed per week (across all flagged workflows):	______ hrs
Fully-loaded cost per reclaimable hour:	$ ______
Tools replaced (annual list from page 3):	$ ______ /yr

OUTPUTS

LOW - 25% hours captured, 40% license reduction:	$ ______
MID - 50% hours captured, 60% license reduction:	$ ______
HIGH - 75% hours captured, 80% license reduction:	$ ______

DECISION TREE - RECOMMENDED PATH

Q1 Any flag is HIGH-confidence, MEAS = 0, and contained to one team?

YES -> Starter ($5K). Two-week deliverable, one workflow.
NO -> Q2: Do workflows span three or more departments?

Q2 Cross-department AND ROI mid-range > $250K?

YES -> Growth ($15K). White-label build under your brand.
NO -> Q3: Is the ROI real but the surface area too large to staff?

Q3 YES -> Enterprise ($50K). Embedded operator for a quarter.
NO -> You are not a Clearfield fit. We will tell you, and we will recommend the right alternative.

NEXT STEP: take this back to your next ops meeting, then book a working session at /book.
The no-fit branch is on purpose - we turn down about half of audits.