STEADWELL

AUDIT WALKTHROUGH

How to audit your own business.

An audit is only worth its method, so ours is public. This is the same method we run on site, written so you can run a rough version of it yourself: what to watch, what to write down, how to time it without fooling yourself, and how to read what you end up with.

It costs an hour or two of walking around your own building. Nothing else. If the totals at the end surprise you, that is the finding.

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Steadwell — St Paul, Minnesota. Every rule in this document is published at /method and /why-you-cant-see-it. The audit itself is free: we charge only for work a business asks us to build afterwards. v. 2026-07-29

Every pain point is written down the same way.

A pain point is any task that takes longer than it should, happens more often than it should, or produces errors someone else has to fix. Boredom is not a pain point. Cost is.

Each one gets a numbered entry with the same eight fields — no exceptions, because entries have to be comparable. The report ranks them against each other.

FIELD	DESCRIPTION
ID	PP-001, PP-002, and so on, in the order we found them
Task	The task in one sentence, in your team's own words
Who	The role that carries it — names only if you want them
Trigger	What starts the task: an email, an invoice, a phone call
Frequency	How often it happens, and the source of that count
Time	Minutes per occurrence, and how we measured it
Errors	What goes wrong, how often, and who fixes it
Evidence	observed, reported, or sampled — defined in section 03

```
PP-014  Re-keying supplier invoices into QuickBooks
who: office manager    trigger: every emailed invoice
freq: 31/wk (sampled, 4 wks of invoices)    time: 4 min (observed, 12 timings)
errors: ~1/wk wrong amount, 20 min to fix (reported)
```

Sample entry. Illustrative numbers, not client data.

> If we did not see it happen, hear it in an interview, or find it in a record, it does not get an ID. Hunches do not make the report.

Five ways a self-audit fails.

Plenty of owners try to run this themselves. Here is where the do-it-yourself version breaks. Read these before you start, not after — each one is a habit you can watch for in yourself while you walk the floor.

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01 **You measure the week everyone knows is being measured.**

Announce an audit and the shop tidies itself. People batch their errands, skip the side chatter, close the extra tabs. You get one clean week on paper, and the leak keeps its schedule.

02 **You count tasks, and the time dies between them.**

A self-audit produces a task list. But the expensive minutes live in the seams: waiting on an answer, switching between tools, checking work that was already checked. No task list has a row called “between.”

03 **You ask people instead of watching the work.**

Memory smooths the day. Ask anyone how long email takes and they will give you a number; sit beside them for a morning and you will get a different one. People report the job as designed, not the job as done. That is not lying. That is remembering.

The last two are the ones that bite.

04 **You chase the annoying instead of the expensive.**

Self-audits go after what irritates people — the clunky login, the slow printer. Irritation is a bad proxy for cost. The expensive leak is usually quiet and boring: a report nobody reads, a spreadsheet updated in two places, an approval that waits overnight. Nobody complains about it. That is why it survives.

05 **You stop where the trail points at you.**

Follow a leak far enough and it often ends at a decision the owner made. The approval step that waits for you. The tool you picked. The rule you set in 2019. A self-audit dies right there, because nobody writes down "the bottleneck is me."

> Every unseen time leak survives because three actors keep it invisible: the owner who is too close to see it, the staff who adapted around it, and the day, which has no timesheet. None of them is doing anything wrong.

Three sources, and the cautious number wins.

Every time figure in a report comes from one of three sources, and the report labels which one.

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1. **Observation.** We time the task with a stopwatch during the visit. A task gets timed at least five times before we publish an average; under five, the figure is marked **estimate**.
2. **Interviews.** The owner and the person doing the task tell us the frequency and the cases we did not see — month-end closes, seasonal spikes, the annual mess. Interview figures are marked **reported**.
3. **Records.** Where timesheets, invoices, tickets, or call logs exist, we pull the most recent four weeks and count. These figures are marked **sampled**.

OBSERVED BEATS REPORTED. SAMPLED SETTLES TIES.

> When the sources disagree, the rule is fixed: the report uses the lowest defensible number and names the disagreement. We would rather under-claim a saving than sell you arithmetic.

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annual hours = minutes per occurrence × occurrences per week × 46 ÷ 60
```

We use 46 working weeks, not 52. Vacations, holidays, and slow weeks are real, and pretending otherwise inflates every number in the report.

Walk the floor with these ten questions.

One page. Ten prompts. Walk your own floor, write down what you find, then do the arithmetic on the next page.

#	PROMPT	WHAT IT IS AT YOUR SHOP	TIMES/WK	MIN EACH	MIN/WK
01	**What gets typed twice?** Anything re-entered from one screen, email, or piece of paper into another system.				
02	**What question do customers ask that gets the same answer every time?** Hours, status, pricing, “did it ship.”				
03	**What report gets built by hand every week or month?** Copying numbers from one place into a spreadsheet counts.				
04	**What gets printed only to be typed back in later?** Follow the paper. Where it lands is usually a pain point.				
05	**What do you check every day just in case?** Inboxes, dashboards, folders — checks that almost never change what you do next.				
06	**What gets chased?** Signatures, approvals, missing info, unpaid invoices. Anything that needs a reminder before it happens.				
07	**What lives in one person’s head?** Work that stops when one specific person is out sick.				
08	**What gets copy-pasted between email and anything else?** Both directions count.				
09	**What waits on the owner?** Approvals only you can give that a written rule could give instead.				
10	**What broke last month because a step got skipped?** Count the rework, not the mistake. The rework is the cost.				

First the multiplication, then the judgment.

Multiply **Times/wk** by **Min each**, row by row. Add up the last column. That is minutes per week. Divide by 60, multiply by what an hour of wages costs you, multiply by 46. That is the yearly number. Forty-six, not fifty-two: vacations, holidays and slow weeks are real, and pretending otherwise inflates every figure you are about to look at. It is a rough number either way — see section 06 for why.

SCORING

Three questions decide every verdict.

AI fit is not a feeling. Each pain point is scored against the same three questions, answered yes or no, each with a written reason.

1. **Is it repeatable?** Does the task run the same basic way each time? If every case is a judgment call, automation produces confident wrong answers.
2. **Is it rule-based?** Could the steps be written down so a careful new hire could follow them? If the rules live in one person's head and change weekly, software cannot hold them.
3. **Is the data available?** Does the information the task needs already sit in a system a tool can reach? Paper, voicemail, and memory are where automations go to die.

YES ANSWERS	VERDICT
3	Yes
2	Partly
0–1	No

Yes, Partly, and No each mean something exact.

Yes — automate this. All three answers are yes. The task, or most of it, can be handled by AI or plain automation, and the annual hours justify the cost of a fix. The finding states the hours returned per year and roughly what the fix involves. It is not a quote.

Partly — automate a piece of it. Two answers are yes. Part of the task can go to software; part needs a human and should keep one. The finding draws that boundary in writing: which half moves, which half stays, and what the half measure is worth.

No — leave it alone, or fix the process instead of buying tools. One or zero yes answers. A tool here would cost more than it saves, fail on the edge cases, or automate a task that should not exist at all. A No is a real finding: it stops money from leaving. No pages get the same measurement rigor as everything else.

> A report with zero No verdicts should make you suspicious — of us. Real businesses contain work AI cannot do.

The score never considers whether we could sell you the fix. Verdicts are set while the report is written, and the report is free either way. Follow-on work, if any, is discussed after delivery, against the report's own numbers.

A self-audit misses things. Here is which ones.

You can't watch yourself work. The most expensive habits stopped feeling like pain years ago — they feel like the job. A stranger logs them because a stranger still notices them.

You'll rate annoyance, not cost. The task everyone complains about is rarely the one bleeding the most time. The quiet one that happens five times a day usually is.

Your numbers will be memories, not measurements. Nobody remembers task times accurately, and the errors don't cancel out. We use a stopwatch and timestamps for a reason.

There's no verdict column. The worksheet finds pain. It can't tell you whether the fix is software, a process change, training, or nothing at all. That judgment is most of what an audit is — and it's the part that keeps you from buying a tool you don't need. Ours is free, so the only thing it costs you to get it is the one to three days on site.

> The worksheet is still worth the hour. Even half-filled, it tells you whether a full audit is worth one to three days of your team's attention — which is the only thing ours costs. And if you book one, bring it: it gives us a head start on day one.

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