NORTHLOOP

Find the Leaks

A 30-minute DIY workflow audit: map one process, score it, and find the automation worth building first.

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A free worksheet from Northloop | northloop.vercel.app

WHAT'S INSIDE

- How to pick the one process worth auditing
- A 5-box map template: write what actually happens, including the waiting
- A one-week time tracker you will actually fill in
- The automation-fit score: frequency x pain x rule-based-ness, with a worked example
- The prioritization matrix, then what to do with your top pick

How to use this worksheet

Set aside 30 minutes. Grab a pen or open a blank doc. You are going to pick one process in your business, map it honestly, and score it. By the end you will know exactly which task to automate first, and whether to do it yourself or hire it out.

Golden rule
Audit one process, not your whole business. A sharp answer about one workflow beats vague notes about ten.

Step 1: Pick one process

Choose the process you dread, the one with the most handoffs between people, or the one where things most often go wrong. Good candidates:

- New client or customer onboarding
- Quoting or estimating
- Scheduling and reminders
- Invoicing and chasing payment
- Handling support requests or complaints

Write your pick here: _____

Step 2: Map it in five boxes

Every process has the same five beats. Fill in what **actually** happens in yours, not what should happen. Include the waiting: the two days an email sits, the back-and-forth to find a time, the invoice that sits unsent.

Box	What actually happens	Who does it	Time it takes
1. Receive	How the work arrives (form, call, DM, email)		

Box	What actually happens	Who does it	Time it takes
2. Review	Deciding what to do with it		
3. Do	The actual work		
4. Wait / check	Waiting, chasing, double-checking		
5. Deliver	Handoff to the customer + follow-up		

Step 3: Time it for one week

For one normal week, jot the minutes each step takes, including waiting time. A rough tally on paper beats a perfect spreadsheet you never fill in.

Day	Step	Minutes	Notes
Mon			
Tue			
Wed			
Thu			
Fri			

Add up the minutes. That total is your weekly cost for this process. Most people are surprised. Write it here: _____ **minutes per week.**

Step 4: Score every step

Rate each step from your map 1 to 5 on three questions:

- **Frequency:** how often does this step happen? (1 = rarely, 5 = daily)
- **Pain:** how painful, boring, or error-prone is it? (1 = fine, 5 = dreadful)
- **Rules:** how rule-based is it? Could a checklist describe it? (1 = pure judgment, 5 = pure routine)

Multiply the three numbers. That is the step's automation-fit score. Highest score wins.

Worked example

Step	Freq.	Pain	Rules	Score
Send appointment reminders	5	4	5	100
Design the custom proposal	2	3	1	6
Chase unpaid invoices	4	5	4	80

Now score your own steps:

Step	Freq.	Pain	Rules	Score

Step	Freq.	Pain	Rules	Score

Step 5: The prioritization matrix

Plot your top-scoring steps on this grid:

- **High score + easy to automate: do first.** This is your quick win.
- **High score + hard to automate: plan it.** Break it into smaller steps and start with the easiest one.
- **Low score + easy to automate: do when bored.** Nice to have, not urgent.
- **Low score + hard to automate: ignore.** Your time is better spent elsewhere.

'Easy' means: the tools exist, the steps are clear, and no judgment calls are needed. When in doubt, pick the smaller step. A working small automation beats a planned big one.

Step 6: What to do with your top pick

The DIY path

- Start with Zapier or Make. Both have free tiers and connect hundreds of tools.
- Automate **one step**, not the whole process.
- Test with fake data first. Send the test text to yourself before it goes to customers.
- Expect version one to be ugly. Working beats pretty.

The hiring path

Bring your map and your scores to a specialist. It makes their job faster and your quote cheaper. Ask:

- What exactly will it do, step by step?
- What does it connect to in my business?
- What happens when it breaks, and how will I know?
- What does support cost after launch?
- Can I see something working before I pay the full amount?

Prefer a fixed price for a fixed scope over an open-ended hourly meter. You should know the total before work starts.

Want a specialist to do this for you?
Northloop offers a free 30-minute workflow audit. We map one process with you, score it, and hand you a plan you can use whether or not you hire us. Book at northloop.vercel.app