

The Practice Workflow Audit

20 questions that find the repetitive work eating your team's week.

By Fresh Mints · Boulder, CO

HOW TO USE THIS (15 MINUTES)

Answer each question YES or NO, honestly. Count your YES answers at the end. A YES means: this is manual, repeated, or held together by memory right now.

This is not a test of how hard your team works. It is a map of where their time goes.

1. CONTENT & REPURPOSING

1. Do you rewrite the same announcement or post for each channel by hand?
2. Does one interview or expert session produce only one piece of content?
3. Is there no shared bank of approved posts, answers, or explanations to reuse?
4. Do you write captions and descriptions from scratch every time?
5. Does content stall whenever one specific person is busy or out?

2. LEADS & FOLLOW-UP

6. Do new inquiries land in an inbox or form that nobody checks on a schedule?
7. Does someone copy leads between tools by hand?
8. Is follow-up timing left to memory, with no automatic reminders?
9. Has an inquiry ever gone unanswered for more than a business day?
10. Could you not say, right now, how many open inquiries you have?

3. CAMPAIGN REPORTING

- 11. Is the monthly report rebuilt by hand from more than one tool?
- 12. Do the numbers change depending on who pulls them?
- 13. Does reporting day eat half a day or more of staff time?
- 14. Have you ever presented numbers you were not sure were right?

4. STAFF KNOWLEDGE & HANDOFFS

- 15. Does at least one key process live only in one person's head?
- 16. Is there no written procedure a new hire could follow alone?
- 17. Do handoffs — shift change, vacation cover, staff turnover — drop tasks?
- 18. Do clients or patients get different answers depending on who they ask?

5. CAPACITY

- 19. Is your team working overtime on tasks that repeat every week?
- 20. If you doubled your clients tomorrow, would something break first?

YOUR SCORE

Count your YES answers.

0–5: Tight operation. Fix the few YES answers and stop. You do not have a workflow problem; you have a short to-do list.

6–12: Leaks worth fixing. Pick ONE workflow — the one with the highest cost in staff time — and fix it properly. Measure the change before you touch the next one.

13–20: You are losing a day a week or more to repeat work. Start with one workflow, build it around the tools you already use, train the team on it, and measure what changes. Then decide on the next one.

WHAT FIXING ONE WORKFLOW LOOKS LIKE

01 MAP — document the process: steps, owner, frequency, cost in staff time.

02 BUILD — one agreed workflow, built around your tools, tested on sample data.

03 ADOPT — your team gets documentation and training, and you measure the change.

Sometimes the fix is AI. Sometimes it is simpler automation. Sometimes it is just a better handoff. The work starts with the process and its constraints, not with a tool.

This offer covers marketing and administrative work only. Patient health information stays out of the workflows I build, and clinical decisions stay out, unless the tools, agreements, and process have been properly reviewed for that use.

NEXT STEP

The Workflow Opportunity Sprint (\$1,500–\$2,500): I map up to three workflows, estimate the time and cost of each, and rank the best first build.

Start here: freshmints.online/ai-workflow-implementation — the intake form takes 2 minutes, and the fit-call booking is on the page.

— Collin Christenbury, **Fresh Mints** · Boulder, CO · (720) 295-2628 · freshmints.online