Sample Automation Audit Report

Fictional example: Northwind Dental (not a real client). Numbers are illustrative.

1. Executive summary

The recall/reminder workflow is a strong first automation: 18 hours/week, rule-based, and currently missing 8-12% of follow-ups.

2. Current workflow

Front desk exports appointments to a spreadsheet, filters no-shows, sends SMS manually, logs replies in a second sheet. Two people, 1.5 hours/day, 5 days/week.

3. ROI (illustrative)

Item	Value
Manual hours/week	18
Loaded hourly cost	$28
Annual labor cost	$26,208
Implementation estimate	$3,500
Tool cost/month	$120
Estimated payback	2.1 months

4. Risks / exceptions

Consent and opt-out must be checked before every send. Failed SMS delivery needs a retry queue and human escalation. Do not auto-book without staff review in month one.

5. 30-day plan

Week 1: map fields and consent. Week 2: build one reminder flow in a sandbox. Week 3: run in parallel with manual. Week 4: review failure rate and cut manual send.

This is a sample deliverable, not a guarantee of results.