



Weekly admin audit to find the one job to hand off first

A free worksheet from Suncoast AI Lab for solo professionals like realtors, bookkeepers, consultants and anyone running the business and doing the work. Takes about 20 minutes, and you don't need any AI tool to fill it in.

It pays to know where your time goes. In a [Stanford and MIT study of 277 accountants](#) (Journal of Accountancy, Aug 20, 2025), AI users moved about 3.5 hours of a 40-hour week from routine data entry to higher-value work. So start there.

Step 1. List last week's repeat admin

Look at your calendar, sent email and to-do list from the past week. Write down every task you did more than once.

Task	Times last week	Minutes each (your estimate)	Total minutes	Where it happens (tool)
Example: client status update email	4	15	60	Gmail
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Common ones are follow-up emails after a showing or meeting, month-end document reminders, meeting notes and summaries, invoice reminders, scheduling back-and-forth.

Step 2. Mark each step

For your top task, write out each step and mark it.

- **R (rule):** the same every time, like sending on a set day. No AI needed.
- **D (draft):** writing or sorting. AI drafts, you approve.
- **K (keep):** a judgment call, a price, or advice. Stays with you.

Step	R / D / K
_____	_____
_____	_____
_____	_____

Step 3. Pick one

Choose the task with the most total minutes that has at least one **D** step and no client-facing step that skips your review.

My first job to hand off: _____ How I'll measure it: minutes per week before _____ and after _____ (include the time you spend checking the output).

Step 4. Test before you trust it

- ☐ Run it on 5 to 10 real past examples first.
- ☐ Check every name, date, number and source it gives you.
- ☐ Keep approving every client-facing message until it has a track record.

If the checking takes longer than the task did, that's a real result. Stop and pick a different job. Want a second set of eyes on your list? Book a free 20-minute call at suncoastailab.com/call. Suncoast AI Lab