

The Manual Process Audit

Twelve questions that find where your team is moving data by hand, and what it is costing you.

How to use this. Answer honestly, about the work as it is actually done rather than as the process document describes it. Tick the box for every **yes**. It takes about ten minutes. You do not need anyone's help to run it, and nothing here asks you to contact us.

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|---|--------------------------|--|--------------------------|
| 1 Does anyone copy data from one system into another by hand?
Every day counts double. | ☐ | 7 Is there a shared spreadsheet that something important depends on?
Count it if more than one person edits it. | ☐ |
| 2 Is there a report someone rebuilds manually every week or month?
Especially if it is always the same shape. | ☐ | 8 Does training a new hire include teaching them a manual workaround?
Workarounds that survive onboarding are permanent. | ☐ |
| 3 Do you log into a system only to look something up and type it elsewhere?
A lookup with no export is a re-keying tax. | ☐ | 9 When one specific person is out, does a process stop?
Key-person risk is usually a systems problem. | ☐ |
| 4 Does a vendor or partner portal you depend on have no API or bulk export?
This is the most expensive one on the list. | ☐ | 10 Do you pay for a system whose data you still re-enter somewhere else?
You are paying twice. | ☐ |
| 5 Have you found an error weeks after it happened?
Late discovery usually means nobody could check everything. | ☐ | 11 Has anyone said "we have always done it that way" in the last six months?
Usually about the most automatable thing you own. | ☐ |
| 6 Do you spot-check records because checking all of them is not feasible?
Sampling is a capacity decision, not a quality one. | ☐ | 12 Could you state today how many hours per week your team spends moving data between systems?
Score this one if the answer is no . | ☐ |

WHAT YOUR SCORE MEANS

0 to 3

Healthy. Your systems are broadly doing their job. Revisit after your next system change or a period of fast growth.

4 to 7

Meaningful drag. There is probably one specific handoff consuming most of the time. Find it and measure it before changing anything.

8 or more

Structural. Manual data movement is now a standing cost and a source of undetected error. It will get worse as volume grows.

SIZING IT IN DOLLARS

Pick the single worst process on the list and estimate three numbers: **hours per week** spent on it, the **loaded hourly cost** of the person doing it, and the **error rate** you would guess.

Annual labor cost = hours per week × loaded hourly rate × 52. Four hours a week at \$35 loaded is roughly **\$7,300 a year**, before counting anything an undetected error costs you. Most teams are surprised by this number, and it is usually the cheapest business case anyone will ever put in front of them.

Whatever you decide to do next, **measure the baseline before you change anything**. Without it you will never be able to prove the change worked.