The Systems Stack Worksheet

Find the one thing to fix first — system, automation, or AI — for the biggest return on your time.

List the 8–10 tasks that eat most of your week — or your front desk's: confirmations, insurance verification, claims follow-up, chasing unscheduled treatment, the morning huddle. For each row, **tick one box in each of the three scored columns**, then add the three numbers for the row total.

The boxes run darkest on the left (worst — furthest from done) to white on the right (best). Highest row totals get built first. A "system" can be a five-minute screen recording — it doesn't have to be written.

#	1. TASK / PROCESS	2. WHERE IS THIS TODAY?				3. TIME COST (hrs / week)				4. VALUE OF THE WORK		ROW TOTAL
		No system **4**	System **3**	Auto / tool **2**	AI / agent **1**	5 hr + **4**	3–5 hr **3**	1–3 hr **2**	< 1 hr **1**	$20/hr **4**	$200/hr + **1**	
1		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	
2		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	
3		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	
4		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	
5		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	
6		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	
7		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	
8		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	
9		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	
10		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	
	ADD EACH COLUMN DOWN →	NOT SUMMED				TIME SCORE TOTAL _____				VALUE SCORE TOTAL _____		_____

HOW TO READ IT

Column 2 — Where is this today? The less built-out a task is, the higher it scores, because it's further from done. No system at all = 4, down to AI already handling part of it = 1.

Column 4 — Value of the work. Judge the task itself: repeatable / admin / anyone-could-do-it is "$20/hr" and scores heavy (4) — it's the fastest thing to get off your plate. Your chair time, diagnosis and case presentation is "$200/hr+" and scores 1.

Row total (max 12) — a 12 means no system, eats 5+ hours a week, and it's low-value work you shouldn't be touching. That's the fastest hour you can buy back. Tip: the highest-scoring boxes are all the same dark shade — scan for the dark ticks.

TOTAL HOURS / WEEK

Add up column 3 down the page: _____ hrs

That's the ceiling on what you can get back.

YOUR BUILD ORDER — TOP 3 BY ROW TOTAL

1. _____ (____)
2. _____ (____)
3. _____ (____)

Bring this to your Revenue Waterline Audit call. It shows us where your bottlenecks are, and we'll pressure-test your ranking against what your numbers actually say.

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