CHATER CONSULTING SERVICES · FREE WORKSHEET

The 20-Minute Process Review Worksheet

Version 1.0 Chater Consulting Services Released April 2026

BEFORE YOU START

A self-serve framework for small Australian care providers who want to figure out what automation is actually worth to their organisation — before they spend a cent on a build, and before they book a call with anyone (including us). This is the exact framework we use when we run a Free 20-Minute Process Review. Not a watered-down teaser. The real thing, structured for self-completion. We made it because we keep meeting operations managers who feel the admin drag and know automation would help, but cannot point at which workflow to fix first. The answer is usually not the one that makes the most noise — it is the one that produces the highest return on the smallest investment.

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1. How to use this worksheet

Set aside 20 to 30 minutes. Ideally do it with one or two of the people who actually run your operation — the ones who feel the admin pain every day. Not alone, and not with people two steps removed from the work.

You will leave with a clear view of where your admin is leaking, a defensible number to take to your board or your budget holder, and the knowledge of what you would need from a build partner if you decide to hire one. No pitch embedded. No email required. No follow-up unless you ask for one.

The worksheet has four steps. By the end of step four, you will have a ranked list of five workflows and a named candidate for your first automation build. That is a lot further than most providers get before they start making automation decisions.

2. Before you start — three warm-up questions

Before you open the scoring grid, answer these three questions out loud with your operations team. Automation scoping always goes better when the people closest to the pain have said out loud which workflows they hate.

What is the staff member who spends the most time on admin actually doing all day? Get specific. "Typing timesheets" is too vague. "Reading staff timesheets emailed from casual carers, cross-checking them against roster exports, then re-entering validated hours into MYOB" — that is specific. Specific is the only useful kind of answer, because automation is a specificity problem before it is a technology problem.

What breaks when the most capable admin person is off sick? The workflows that fall apart when your most capable admin person takes a day off are the ones riding on invisible knowledge — the kind nobody wrote down because the person who does it has just always known. Those are automation-shaped problems. Automation is very good at making invisible knowledge explicit, and explicit knowledge is the only kind that survives a staff turnover.

What takes longer than it should? Ask your team to name three tasks that *feel* disproportionate to their outcome. Humans have good instincts for this. "Why does it take me half a day to prepare a fortnightly claim?" is the start of a useful conversation. The instinct is usually right, even when the person cannot articulate the reason.

Write these answers down before you move on. The rest of the worksheet is about converting that instinct into a number you can defend to a budget holder.

3. Step 1 — List your five worst workflows

A workflow, for the purposes of this worksheet, is a repeating sequence of steps your team performs to get something done. A workflow has a trigger (something starts it), handoffs (people and systems it passes through), and an output (something arrives at the end). Every workflow has a frequency, a typical duration, and a cost — and those are the numbers you need.

Examples we see often in Australian care providers, to calibrate your thinking:

- **Client intake and onboarding.** Referral arrives, forms completed, data entered into the system of record, plan ingested, consents captured, first shift scheduled. Typical duration is 4 to 8 hours per new client across everyone who touches it. Typical frequency: 2 to 8 new clients per month for a small provider.
- **Timesheet reconciliation to payroll.** Staff submit timesheets, admin reconciles against the roster, discrepancies flagged, corrections chased, payroll prepared. Typical duration: 6 to 12 hours per fortnight. Typical frequency: every pay cycle, non-negotiably.
- **Compliance evidence preparation for audit.** Gather staff training records, certify against current requirements, match to incident register, assemble the evidence folder, internal review, submit. Typical duration: 10 to 40 hours compressed into the week before an audit. Typical frequency: quarterly or annual.
- **Claim preparation and validation.** Pull service delivery data, cross-check against plan budgets, format to portal requirements, submit, handle rejections, reconcile. Typical duration: 4 to 12 hours per cycle. Typical frequency: weekly or fortnightly depending on funder.
- **Incident report handling.** Incident captured, structured intake, routing to supervisor, regulatory notification if required, investigation, close-out documentation. Typical duration: 1 to 6 hours per incident. Typical frequency: variable, but compounding.

List your five. Be specific. If your workflow takes more than three sentences to describe, it is probably actually two or three workflows stacked on top of each other — split it. If you cannot think of five, write four and leave the fifth blank for now. Most small providers discover the fifth in conversation during the next step.

#	WORKFLOW NAME	SHORT DESCRIPTION
1		
2		
3		
4		
5		

| --- | --- | --- |
2		
3		
4		
5		

1		
3		
4		
5		

2		
4		
5		

3		
5		

4		

4. Step 2 — Score each workflow on four axes

Now score each workflow on four dimensions. Be honest. The scoring is only useful if it is real. If you are not sure between two scores, pick the lower one — it is better to understate the pain than to overstate it, because overstated pain leads to builds that cannot deliver the promised return.

Axis one: hours per week. How many staff hours per week does this workflow consume across your entire organisation? Sum everyone who touches it. A weekly workflow that takes 3 hours for one person is 3. A daily workflow that takes 30 minutes for one person is 2.5. A workflow that takes 8 hours once a month is 2 per week (32 divided by 4). For workflows that spike (audit prep is the clearest example), average across the year.

- **Score 1** — under 2 hours per week
- **Score 2** — 2 to 5 hours per week
- **Score 3** — 5 to 10 hours per week
- **Score 4** — 10 to 20 hours per week
- **Score 5** — more than 20 hours per week

Axis two: error frequency. How often does this workflow produce a mistake that needs cleaning up? An error is any step where someone discovers data that was entered wrong, a step that was skipped, a handoff that was missed, or a system that was not updated in time. Include the ones you catch and the ones you only notice later. If your team is not sure, ask the person who runs it most often — they usually know the real answer.

- **Score 1** — almost never, maybe once a quarter
- **Score 2** — occasionally, a few times a month
- **Score 3** — regularly, weekly or more
- **Score 4** — frequently, multiple times a week
- **Score 5** — constantly, every cycle has something to fix

Axis three: regulatory or audit risk. If this workflow fails or the evidence it produces goes missing, what is the regulatory consequence? For most Australian care providers, the workflows with the highest regulatory risk are compliance evidence preparation, incident reporting, and claim preparation — because they are the ones that come up in audit. The ones with the lowest risk are usually internal admin that nobody outside the organisation ever asks about.

- **Score 1** — no regulatory consequence at all
- **Score 2** — minor, the organisation would notice, auditors would not
- **Score 3** — moderate, auditors would query but not flag
- **Score 4** — significant, likely finding at audit
- **Score 5** — critical, puts registration or funding at risk

Axis four: handoff fragility. How many people or systems does this workflow pass through? Every handoff is a potential failure point. A two-person, two-system workflow has roughly four handoff points (person A, system 1, person B, system 2). Workflows with lots of handoffs are where invisible knowledge lives, and they are where automation almost always produces disproportionate returns because you can replace several fragile handoffs with one reliable pipeline.

- **Score 1** — just one person and one system
- **Score 2** — two people, or two systems, not both
- **Score 3** — two people and two systems

- **Score 4** — three or more people spread across three or more systems
- **Score 5** — dozens of touchpoints, nobody owns the whole flow

Fill in the grid for each of your five workflows.

#	WORKFLOW	HOURS/WK	ERRORS	REG RISK	HANDOFFS	TOTAL
1						
2						
3						
4						
5						

---	---	---	---	---	---	---
2						
3						
4						
5						

1						
3						
4						
5						

2						
4						
5						

3						
5						

4						

5. Step 3 — Calculate a rough annual cost

Now turn the hours into money, because money is the only language that works across operations, finance, and the board.

We use the SCHADS Award Level 2, pay point 2 base rate of **$35.67 per hour** — the 1 July 2025 figure from the Fair Work Pay Guide for MA000100. That number is deliberately conservative. Most staff cost more than Level 2 once penalties, on-costs (superannuation, workers' compensation, leave loading), and the cost of supervising them are added. A realistic fully-loaded hourly cost for an Australian care-sector admin worker is typically in the $55 to $75 per hour range. Start with the conservative number. You can multiply later if you want a bigger answer to take to your board.

The formula. For each workflow: weekly hours, times 48 working weeks per year, times $35.67. Why 48 working weeks? Because Australian employees typically take 4 weeks of annual leave plus some public holidays and sick days, so a full-time equivalent year is about 48 weeks at 38 hours each, which is 1,824 hours. We use the same number in the ROI calculator on our website.

Worked example. A workflow that consumes 8 staff hours per week is 8 times 48 times $35.67, which is $13,697 per year at the conservative rate. Apply a realistic fully-loaded multiplier of 1.75 and it is closer to $24,000 per year. A workflow that consumes 20 staff hours per week is closer to $34,000 at the conservative rate, or $60,000 fully loaded. Those are numbers you can defend to anyone who signs off budgets.

Apply the formula to each of your five workflows. If a workflow has variable frequency (audit prep is the obvious one), convert to an average — 40 hours four times a year is 160 hours annually, divided by 48 weeks, is 3.3 hours per week on average.

#	WORKFLOW	HOURS/WK	CONSERVATIVE ($)	FULLY LOADED ($)
1				
2				
3				
4				
5				

---	---	---	---	---
2				
3				
4				
5				

1				
3				
4				
5				

2				
4				
5				

3				
5				

4				

6. Step 4 — Rank and pick the one worth fixing first

You now have five workflows, each with a score on four axes and an annual cost in dollars. The temptation is to pick the workflow with the highest annual cost — the most expensive one — and fix it first. That is usually wrong.

The workflow worth fixing first is the one with the highest *return on effort*. That means high current cost (there is something real to recover), high error frequency (the current version is unreliable, so the improvement is easy to demonstrate and easy to believe), and — for the first build — relatively low regulatory risk, because your first automation is a proof, not a bet. A workflow that fails the regulatory test should be fixed eventually, and probably soon, but not as build number one.

Save high-regulatory-risk workflows for build two or three, when you have proven the approach and you know your build partner and you have systems in place to monitor the automation once it ships.

A rule of thumb. If the total score across all four axes is 14 or higher, and the conservative annual cost is over $10,000, and the regulatory risk score is 3 or lower, that workflow is your candidate. Write down its name. Write down why. Share it with whoever controls the budget.

If no workflow clears all three bars, you have a harder answer: automate nothing yet. The drag is real, but you do not have a candidate that justifies the build cost at this point in your operation. Come back to the worksheet in six months, or address the drag with process redesign and training instead of automation. There is no shame in not building yet. There is real shame in building the wrong thing first.

7. Three patterns we see most often

If you have done the scoring honestly, there is about a 60% chance your top-ranked workflow is one of these three. We see them across every vertical we work in — disability support, aged care, allied health. They repeat because the shape of the work repeats.

Pattern one: timesheet reconciliation to payroll preparation. High hours (every pay cycle), high error rate (humans reconciling humans), low-to-moderate regulatory risk (payroll errors are unpleasant but rarely regulator-facing at audit). Fixable with a build that connects rostering, timesheet capture, reconciliation, and payroll export. Typical build cost in the $6,000 to $12,000 band. Typical saving 10 or more hours per fortnight. This is the most common first automation we ship, and it is the one most providers feel immediately.

Pattern two: client intake and first-shift scheduling. Medium hours but high frustration cost and real drop-off risk if it takes too long. New clients who wait 3 days to hear back from you sometimes go somewhere else in the meantime, which is revenue you never see. Fixable with a build that digitises intake forms, routes referrals to the right coordinator, and schedules the first appointment automatically. Typical build cost in the $3,000 to $8,000 band. Typical saving 5 or more hours per week, plus a substantial drop in referral-to-first-shift time.

Pattern three: compliance evidence assembly for audit. Low average hours per week but massive spikes before audit windows, and high regulatory consequence if the evidence fails. Fixable with a build that captures evidence at the point of creation (staff training completion, incident close-out, client consent) rather than assembling it reactively in the week before an audit. Typical build cost in the $6,000 to $15,000 band. Typical saving 20 or more hours per audit cycle, and a substantially lower-stress audit experience — which matters even if you cannot put a dollar figure on it.

None of these is a sales pitch for us specifically. They are the shape of the work that exists in your sector. If your top candidate looks like one of these three, you are already further along than most providers who book the Free Process Review call, because you have named the problem in the language it actually exists in.

8. Next moves — three honest options

You now have a ranked list, a named candidate, and a defensible annual cost. Three options for what to do next, in order of decreasing DIY and increasing outside help.

Option A — Fix it yourself. If your operation has someone who can spend 10 to 30 hours on build work — even without prior automation experience — you can probably ship the first build in-house using Microsoft Power Automate, UiPath StudioX, or a low-code tool. The worksheet you just completed is the scoping document. Hand it to that person and tell them to come back in two weeks with a working prototype. This is the cheapest path, and for organisations with internal capability it is often the best first move. If you get stuck, you still have options B and C.

Option B — Book the Free 20-Minute Process Review with us. If you want an outside pair of eyes before you commit to a build, bring the worksheet. We will walk through your top candidate, stress-test the scoring, and tell you honestly whether the build is worth it at the cost you are imagining. No pitch embedded. If the right answer is "fix it yourself", we say so. The call is free. Go to chaterconsulting.com.au and click the Free 20-Minute Process Review button.

Option C — Skip to the paid $1,500 Assessment. If you already know what you want scoped and you want to move fast, the Assessment is the shortest path to a defensible build brief. It builds on what you just did in this worksheet, deepens it into a full operational review, and produces a prioritised automation roadmap with effort estimates, risks, dependencies, and platform recommendations. Most clients who come in with a clear top candidate from the worksheet go straight to this. It is the path with the least ambiguity and the most structure.

Whichever option you pick, you are now ahead of the providers who start their automation journey with a vague feeling and a vendor pitch deck. The worksheet is the difference between automation as a hope and automation as a decision.

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9. One-page summary

Fill this out as the artefact to stick on the wall, bring to your next budget meeting, or send to your board.

Top-ranked workflow: _____

Score out of 20: _____

Conservative annual cost: $_____

Fully loaded annual cost: $_____

Matches pattern (1, 2, 3, or none): _____

Next step (A, B, or C): _____

Who owns this decision: _____

Decision deadline: _____

What we will tell the team on Monday:

_____

If this worksheet was useful, let us know. We have more where it came from. Email dillon.chater@chaterconsulting.com.au or visit chaterconsulting.com.au.