

THE HUMAN-CENTERED AI PRACTICE AUDIT

A five-minute tool to find the best place to start using AI in your practice

Prepared for readers of Dr. Steve Vargo's book

Start Here

AI becomes useful when it is aimed at a real problem. The goal of this short audit is not to turn your practice into a technology project. The goal is to help you identify the places where time, energy, communication, and attention are being drained so you can choose a practical starting point.

Use this tool individually or with your leadership team. It should take about five minutes to complete. If you are tempted to overthink your answers, resist the urge. Your first impression is usually enough to reveal where the friction is.

“The better question is not, ‘How can AI run my practice?’ The better question is, ‘How can AI help me with this?’”

How to Use This Audit

For each statement below, rate your practice from 1 to 5. A lower score means the area is working reasonably well. A higher score means the area creates repeated friction, wasted time, confusion, or inconsistency.

Score	Meaning
1	This rarely creates friction.
2	This occasionally creates friction, but it is manageable.
3	This is a recurring issue worth improving.
4	This creates noticeable time loss, stress, or inconsistency.
5	This is a major drain on the practice and needs attention soon.

Part 1: The Five-Minute Practice Audit

1. Administrative Time Drains

This section helps you identify repetitive work that consumes time without requiring high-level clinical judgment.

Statement	Score 1-5
We spend too much time rewriting, retyping, or recreating similar messages, documents, or explanations.	
Important information is often buried in emails, notes, chats, or memory instead of being easy to find.	

Team members frequently ask the same operational questions because expectations or processes are unclear.	
We have recurring tasks that could be standardized, templated, summarized, or drafted more efficiently.	

Administrative Time Drains Total: ____ / 20

2. Staff Communication and Training

This section helps you find opportunities to clarify expectations, reduce repeated questions, and make training easier to deliver consistently.

Statement	Score 1-5
New team members rely too heavily on verbal training or 'just ask someone' learning.	
We explain the same concepts repeatedly because our training materials are incomplete or outdated.	
Staff meetings or coaching conversations could be more focused, organized, or action-oriented.	
Team communication sometimes breaks down because expectations are assumed rather than clearly documented.	

Staff Communication and Training Total: ____ / 20

3. Patient Communication

This section helps you identify areas where patients may need clearer explanations, better follow-up, or more consistent messaging.

Statement	Score 1-5
Patients sometimes leave without fully understanding recommendations, options, or next steps.	
Our team could use better language for explaining value, urgency, benefits, or risks.	
We do not always have consistent scripts or message templates for common patient questions.	
Follow-up communication could be clearer, more timely, or more personalized.	

Patient Communication Total: ____ / 20

4. Leadership and Decision-Making

This section helps you identify places where leadership work is stuck in your head instead of being turned into clear direction for the team.

Statement	Score 1-5
Too many decisions, reminders, or next steps still live in the owner's or manager's head.	
Difficult conversations with staff are delayed because it is	

hard to organize the message.	
We could make better use of agendas, meeting summaries, action plans, and accountability notes.	
Our leadership communication could be clearer, more consistent, and less reactive.	

Leadership and Decision-Making Total: ____ / 20

5. Patient Journey and Practice Friction

This section helps you identify friction points in the patient experience that may be creating confusion, delays, or missed opportunities.

Statement	Score 1-5
Patients experience unnecessary confusion before, during, or after the visit.	
Our handoffs between team members are not always smooth or consistent.	
We have recurring bottlenecks in scheduling, check-in, testing, optical, checkout, or follow-up.	
Some parts of the patient journey depend too much on individual staff habits rather than reliable systems.	

Patient Journey and Practice Friction Total: ____ / 20

Part 2: Your Scorecard

Transfer your totals below. The highest score is your best starting point.

Audit Category	Total Score
Administrative Time Drains	
Staff Communication and Training	
Patient Communication	
Leadership and Decision-Making	
Patient Journey and Practice Friction	

Highest-scoring category:

One specific issue inside that category:

Why this matters now:

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Part 3: Choose Your AI Starting Point

Once you have identified your highest-scoring category, use the table below to choose a simple next step. The key is to start small. Do not try to transform the entire practice this week. Pick one recurring problem and use AI to help you create a better first draft, clearer process, or more consistent message.

If Your Highest Score Is...	Your Best First AI Use Case	Try Asking AI To Help You...
Administrative Time Drains	Drafting and summarizing	Create templates, summarize notes, organize ideas, or draft repeatable messages.
Staff Communication and Training	Training and onboarding	Build a checklist, training outline, meeting agenda, or role-specific expectations.
Patient Communication	Patient-facing explanations	Rewrite explanations in clearer language, create FAQs, or draft follow-up messages.
Leadership and Decision-Making	Leadership communication	Prepare coaching conversations, meeting notes, action plans, or accountability language.
Patient Journey and Practice Friction	Workflow improvement	Map a process, identify bottlenecks, draft handoff language, or create a better patient journey checklist.

Part 4: The One-Problem Worksheet

Use this section to turn the audit into action. If you only complete one part of this tool, complete this page.

Prompt	Your Answer
What recurring problem do we want to improve first?	
Where does this problem show up in the practice?	
Who is affected by it?	
How often does it happen?	
What does this problem cost us in time, energy, clarity, patient experience, or team morale?	
What would "better" look like?	
What is one small AI-assisted output that would help?	

Part 5: Copy-and-Paste AI Starter Prompts

Use one of the prompts below based on your highest-scoring category. Replace the bracketed text with your own details.

Administrative Time Drains

I run an independent optometry practice. We are losing time because [describe recurring administrative task or communication problem]. Help me create a simple repeatable template or process that would reduce rework, clarify expectations, and make this easier for the team to execute consistently.

Staff Communication and Training

I need to train my optometry team on [topic or task]. Create a simple training outline that includes the goal, key talking points, step-by-step process, common mistakes, and a short checklist a manager could use to confirm understanding.

Patient Communication

Help me explain [recommendation, diagnosis, product, procedure, or next step] to a patient in clear, human language. Make it understandable without sounding scripted or salesy. Include a short version, a more detailed version, and a response to the most common objection or concern.

Leadership and Decision-Making

I need to have a coaching conversation with a team member about [issue]. Help me prepare a clear, respectful conversation outline that addresses the behavior, explains the impact, sets expectations, and ends with a practical next step.

Patient Journey and Practice Friction

Act as a practice management consultant. Help me map the patient journey step by step for [part of the visit or workflow]. Identify likely friction points, communication gaps, and opportunities to make the experience smoother for both patients and staff.

Part 6: Your 10-Minute Next Step

Choose one action you can take this week. The goal is not perfection. The goal is progress.

This Week's AI Starting Point	Your Answer
The problem we will work on first is...	
The AI-assisted output we will create is...	
The person responsible is...	
We will review the first draft by...	
We will know this helped if...	

Closing Thought

AI works best when it is pointed at something specific. Start with one friction point, one prompt, and one useful output. Then build from there.

The goal is not to make your practice less human. The goal is to create more room for the human work that matters most.