Automation Readiness Worksheet

The Worth Automating Test: five questions to ask before you automate anything

Pick ONE process. Answer in a few words. Rough guesses are fine.

Process name _____

Who does it now _____ **Tools involved** _____

1. Does it repeat?

Is it done the same way at least once a week? Think of the last three times.

How often (times per week):

2. What does it cost today?

Count time, mistakes, delays, and lost chances. Rough numbers are fine.

Minutes each time x times per week. Mistakes. Leads or payments that slip.

3. What must stay human?

Judgment, tone, money, legal promises, and moments of real connection.

Steps that stay with a person:

4. What does it touch?

List the tools and where the data lives. Is the data clean? Who owns it?

Tools, data, and one named owner:

5. What happens when it breaks?

Who will notice? Can you do it by hand for a week? Can you undo it?

Who notices, my fallback, and how I undo it:

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Now place the process in one of four outcomes

Look at your answers. Pick the outcome that fits best. Check one box.

☐ **Automate now**
It repeats, the cost is clear, the data is clean, someone owns it, and you have a fallback.

☐ **Simplify first**
It repeats, but the steps are messy, the data is messy, or nobody owns it. Fix the process, then automate.

☐ **Keep manual**
It needs judgment, tone, or a relationship. Or it happens too rarely to be worth it.

☐ **Revisit later**
It could help, but the cost is low today or it depends on a change you have not made. Check again in 3 months.

Why I chose this outcome (one sentence)

My first small step this week

Owner _____ **Review date** _____

Want a second set of eyes?

We run your process through the five questions together and see what makes sense. No pressure and no sales script.

Book a free 30-minute call

Read the full guides: **neydalarson.com/automation-guides**