

AUTOMATION OPPORTUNITY CHECKLIST · 1 OF 3

is this process ready to automate?

- ☐ It starts with a clear trigger
- ☐ The steps are the same every time
- ☐ The exceptions can be listed
- ☐ The data already lives in a tool
- ☐ Missing it has a real cost

Missing a box? Fix the process first. Automating it usually creates more work, not less.



AUTOMATION OPPORTUNITY CHECKLIST · 2 OF 3

what should you automate first?

- ☐ How often does it happen?
- ☐ What does a miss cost?
- ☐ Rank: how often × cost of a miss
- ☐ Start with the top one only
- ☐ Run it for a few weeks first

One reliable automation is worth more than five half-finished ones.



AUTOMATION OPPORTUNITY CHECKLIST · 3 OF 3

what should stay human?

- ☐ Anything that goes to a client
- ☐ Signing, deleting or publishing
- ☐ Decisions: keep, change or stop
- ☐ Steps that change every time
- ☐ Approving any AI output

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