
Before you automate it

A practical worksheet for removing repetitive work without losing the judgment that makes it good.

01 / Pick a real repeated task

What happens often? How long does it take? What triggers it? Write the current steps before choosing a tool.

02 / Name the inputs and output

Where does the information come from? What does a useful finished result look like? Note the owner.

03 / Draw the boundary

What can the system draft or prepare? What must a person review, approve, or send?

Design the handoff.

The best automation is understandable enough for someone else to operate when you are away.

04 / Protect the information

Use only information you have permission to process. Remove unnecessary personal or confidential data. Check the tool settings and access before connecting it.

05 / Define a good result

List the checks: factual accuracy, brand voice, format, completeness, and the next action. Keep an example.

06 / Plan for a bad result

What happens if information is missing, a tool fails, or the output is uncertain? Name the person to alert.

Test small. Then decide.

Run a limited pilot before the workflow becomes part of how your team works.

07 / Try ordinary and awkward cases

Test a normal input, an incomplete input, a duplicate, and an unexpected format. Record what failed.

08 / Compare the whole process

Count review time and corrections, not only generation time. Does the workflow save effort at an acceptable quality?

09 / Keep an owner and a stop switch

Document the steps, access, review rhythm, and how to pause it. Expand only when the pilot works reliably.
