

Automation Starter Workbook

Choose one repeated job.
Find the part worth automating.

OBSERVE

What actually happens today?

MAP

Where does a person stay involved?

TEST

What happens when it fails?

1. Choose the job

Describe the work before naming a platform.

The task

What does a person do now?

Trigger and frequency

What starts it, and how often?

Input and access

Where does the information come from?

Current owner

Who knows whether the job is done?

Observed time

Measure a few real runs, including awkward ones.

Why change it?

What would make this worth maintaining?

2. Map the current path

Keep one useful outcome in view. Mark hand-offs and judgement calls.

Trigger

What event starts a run?

Input

What data and permissions are needed?

Checks

What must be true before continuing?

Action

What does software prepare or change?

Human review

What decision needs a person?

Failure / fallback

How does it stop, recover or hand back?

3. Keep a person in control

A high score or large time saving cannot cancel out a serious consequence.

Consequences of a wrong result

Consider safety, money, access, sensitive data and irreversible changes.

Work software may prepare

Separate moving information from making the decision.

Review owner and stop conditions

Name who approves and when a run must stop.

Manual fallback

How would you do the job if this stopped working for a week?

4. Test the smallest version

Use synthetic data first. Record expected and actual outcomes.

Case	Expected outcome	Actual result / evidence
Normal input		
Missing input		
Duplicate event		
Approval refused		
Action fails		
Retry / recovery		

Release decision and owner

What remains manual? Who can stop the workflow?

5. Review after using it

Count the maintenance as well as the minutes removed.

Gross time removed

Minutes per run $\times$ runs per week $\times$ people $\times$ automated fraction / 60.

Weekly team maintenance

Include exception handling, checking and repairs in hours.

Net weekly time

Gross hours removed minus team maintenance. Negative is meaningful.

Setup and annual assumptions

Working weeks $\times$ net weekly hours, minus setup for the first year.

What changed?

What became easier? What new admin appeared?

Keep, simplify or stop?

Record the owner, review date and one lesson worth sharing.