

PRACTICAL AUTOMATION GUIDE

The automation audit

A practical guide for owner-led businesses deciding which repeated work is worth handing over - and which should stay human-owned.

Automate the work that earns its complexity.

Start with the task, compare value and risk, then measure the work before anything is built.

01

Map the real task.

Start with the work and its failure points, not the software.

02

Compare value and risk.

Frequency matters, but so does the commercial cost of being wrong.

03

Measure first.

A baseline shows whether the automation removed real work.

If the task keeps coming back, compare it before you automate it.

[Use this guide →](#)

MISSION & SCOPE

The most annoying task is not always the best candidate.

Repetition is visible. Commercial value is harder to see. A useful audit compares tasks before anybody starts choosing tools.

THIS GUIDE IS USEFUL IF

- Your team has a list of repetitive work.
- The loudest complaint becomes the next project.
- You cannot explain which task offers the most useful return.

THIS GUIDE WILL NOT

- Pick a product or build an automation.
- Assume every tedious task should be handed over.
- Promise savings before the current work is measured.

How the audit works

01

Map

Describe the real task, inputs, errors, owners and handoffs.

02

Compare

Score frequency, consequence, stability and hidden judgement.

03

Measure

Capture a baseline before implementation changes the process.

An automation audit is a task-selection exercise, not a software-shopping exercise.

It asks what repeats, what errors cost, how stable the work is and which manual steps would genuinely disappear. Not every chore deserves a machine.

BEFORE SOFTWARE

Six tests every automation candidate should pass.

A task needs to earn its place on the shortlist before anyone debates which tool should handle it.

Start with the work.

Ask whether automation removes enough effort or risk to justify setup, controls and maintenance.

01

Frequency

How often does the task genuinely occur?

02

Consequence

What happens when the automated version is wrong?

03

Stability

Will the process stay materially the same?

04

Judgement

How much context or discretion is hidden inside it?

05

Baseline

Can current effort, error or delay be measured?

06

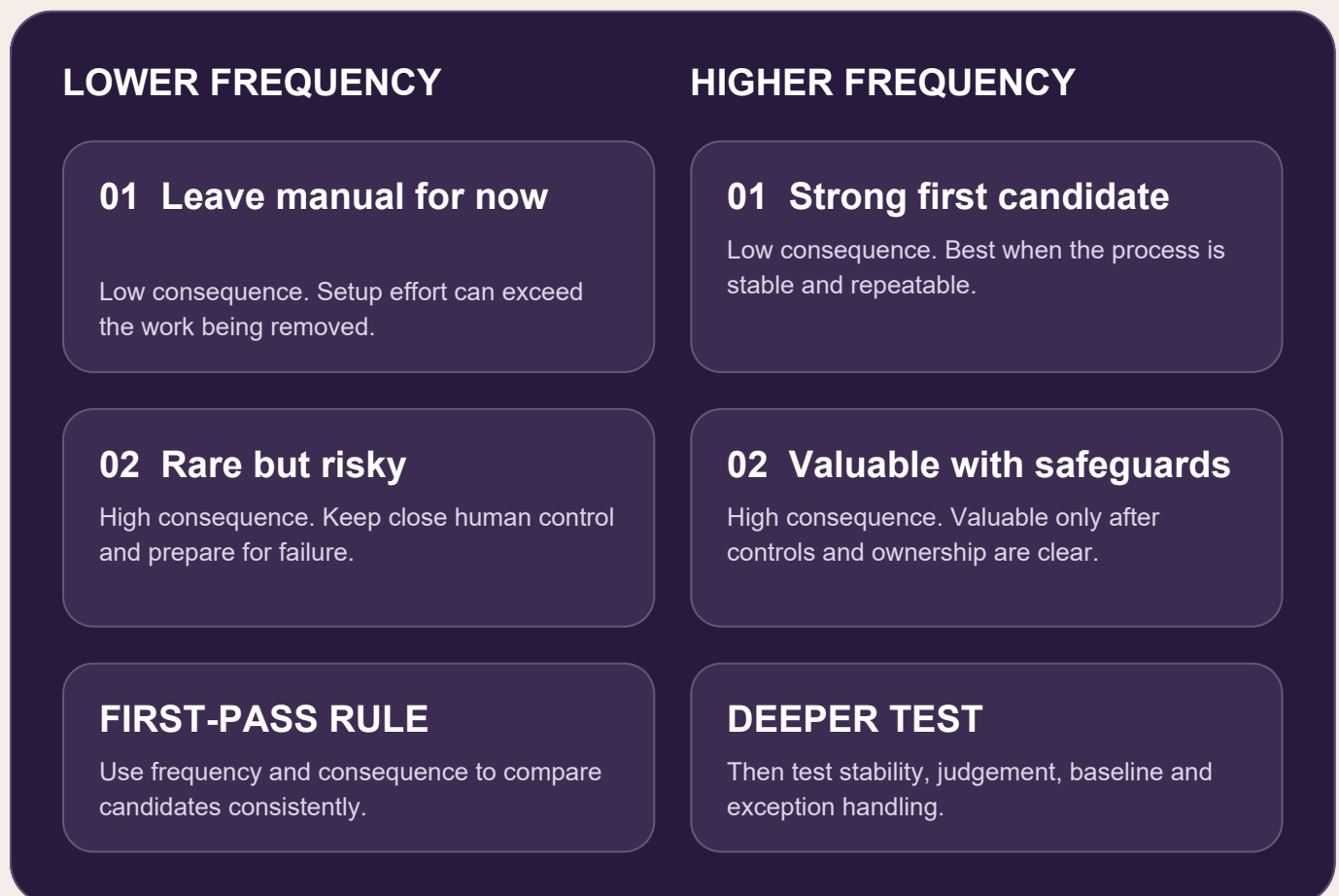
Removal

Which manual steps would actually disappear?

PRIORITY MATRIX

Frequency and consequence set the first priority.

A first-pass screen before deeper scoping.



Found a candidate? Inspect the handoffs next →

COMMERCIAL EFFECT

The right target removes real cost without creating a larger failure.

A task can be boring and still be too small, unstable or risky to automate first.

Stable repeated work

Clearer candidate

Predictable inputs make the build easier to test and maintain.

Broken process automated

Scaled failure

Technology makes the current defect happen faster or more consistently.

Baseline captured

Visible value

Time, errors, rework and handoffs can be compared after launch.

No baseline

Invisible value

Nobody can show whether the automation actually improved the work.

Stable process

Better fit

The task is steady enough to justify setup and maintenance.

Changing process

Short-lived build

Automation can harden a workflow the business already plans to replace.

Ask what measurable effort, delay or risk would disappear.

Expect setup and learning cost before repeat value appears. Judge total work removed, not the speed of the first automated run.

FIVE SIGNS THE BUSINESS IS AUTOMATING THE WRONG THING

Problems to catch before the build begins.

These faults exist upstream, which makes them cheaper to address now.

Critical

Sign 1

The task is automated before anyone understands why it fails

The process, ownership or input problem is still unresolved.

WHAT IT COSTS

A faster version of the same failure and harder troubleshooting.

Major

Sign 2

The loudest task wins

Complaints replace a comparison of effort, frequency and consequence.

WHAT IT COSTS

Budget goes where the story is loudest, not where value is greatest.

Major

Sign 3

No baseline is captured

Current time, errors, rework and handoffs are never recorded.

WHAT IT COSTS

Improvement becomes opinion and weak automation is harder to challenge.

Moderate

Sign 4

The task is already due to change

A process scheduled for redesign is automated in its current form.

WHAT IT COSTS

Short-lived development and duplicated change effort.

Moderate

Sign 5

Rare, high-consequence work is ignored

Low-frequency tasks fall off the list even when each failure has serious impact.

WHAT IT COSTS

Important risk remains unmanaged while smaller annoyances get attention.

The loudest complaint is not automatically the best business case.

Compare every candidate on the same measures before choosing a tool.

CORRECTION AND SELF-ASSESSMENT

Five questions before a task makes the shortlist.

Common myth: start with whatever the team hates most. Better framing: annoyance is a clue, not a business case.

01

What problem are we actually trying to remove?

Name the repeated effort, delay, error or handoff - not merely that the task is manual.

02

How often does it happen, and what happens when it goes wrong?

Frequency and consequence separate a useful candidate from a noisy complaint.

03

Is the process stable enough to automate now?

A planned redesign can make the proposed build obsolete.

04

What baseline will prove the automation helped?

Record time, errors, rework or handoffs before the new process begins.

05

Who owns exceptions, review and failure response?

A named owner must know when to step in and what to do.

WORKING AUTOMATION STANDARD

A reusable shortlist your team can compare.

Put every candidate through the same review. This turns a list of complaints into comparable business problems.

01 Name the problem

Describe the effort, error, delay or handoff to remove.

02 Score frequency

Record how often the task genuinely occurs.

03 Test consequence

Record the cost of a wrong result.

04 Check stability

Confirm the process will stay materially the same.

05 Capture baseline

Record current time, errors, rework and handoffs.

06 Name the owner

Assign exceptions, review and failure response.

INSTEAD OF

“This task is annoying.”

No comparison, baseline or owner.

Reusable candidate scorecard

TASK:

PROBLEM TO REMOVE:

FREQUENCY:

CONSEQUENCE:

STABILITY:

CURRENT BASELINE:

STEPS REMOVED:

EXCEPTION OWNER:

DISCUSS THE SHORTLIST

~~Build~~ a shortlist with a business case.

Compare repeated tasks before committing to a tool.

DUE DILIGENCE

Map the work. Measure the change.

Three rules and two next steps for a safer automation decision.

01

Map before tooling

Understand the process before automation becomes the proposed fix.

02

Measure the baseline

Capture time, errors, rework and handoffs before implementation.

03

Assign an owner

Decide who steps in when the automated path cannot continue safely.

A roadmap is a queue of business problems—not a shopping list.

If a provider cannot explain the task, value, controls and owner plainly, keep digging.

CONTINUE LEARNING

Agent Handoff

See where a well-defined process can still fail between people

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Automate the work with a business case.

Start with the repeated task. Compare frequency, consequence and stability before deciding what should be handed over.

PRIMARY NEXT STEP

Agent Handoff

See where a well-defined process can still fail between people and systems.

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Need help prioritising repeated work?

Bring the shortlist. Compare effort, risk, stability and controls before committing to a tool.

[Talk to Jayden →](#)