

The 5-Step Automation Readiness Check

Work the five steps in order. The technology comes last: steps 1 through 4 are business work, and that is where readiness is won or lost.

1 Find and prioritize the right processes

Pick processes that are a natural fit, and start where the value is clear and the risk is low.

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| ☐ Repetitive and done often | ☐ Rule-based, few judgment calls |
| ☐ High volume or high error-cost | ☐ Stable: the steps rarely change |
| ☐ Touches multiple systems by hand | ☐ Painful enough that people notice |

Ask yourself: What are the three most repetitive, rules-based tasks your teams complain about?

2 Map and standardize the process

Before you automate a process, agree on the one right way to do it, and document it clearly.

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| ☐ Write down the actual as-is steps | ☐ Find the "it depends" exception points |
| ☐ Decide the single standard path | ☐ Trim needless variation and workarounds |
| ☐ Confirm it with the people who do it | ☐ Note the rules behind each decision |

Ask yourself: If five people do this task, do they all do it the same way? (Usually: no.)

3 Get your data ready

Automation runs on data. If it is inconsistent, duplicated, or scattered, the automation will fail.

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| ☐ Identify the data the process uses | ☐ Check it is consistent and complete |
| ☐ Remove duplicates and fix formats | ☐ Agree a single source of truth |
| ☐ Assign an owner for each data set | ☐ Confirm the systems can be accessed |

Ask yourself: Is the data this process relies on clean, consistent, and in one trusted place?

4 Build the business case and define success

Decide what "good" looks like before you build, and baseline it, so you can prove the value later.

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| ☐ Baseline the before: time, cost, errors | ☐ Set 2 or 3 clear success metrics |
| ☐ Estimate the realistic return | ☐ Name a business owner for the outcome |
| ☐ Right-size scope to a first win | ☐ Plan how you will report results |

Ask yourself: What number would make you say, six months from now, "that was worth it"?

5 Start small, prove it, then scale

Run one automation end to end, prove the value, then expand with monitoring and governance in place.

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| ☐ Pilot one well-chosen process | ☐ Run it alongside the manual way first |
| ☐ Measure against your baseline | ☐ Add monitoring and error alerts |
| ☐ Capture the lessons, then expand | ☐ Build a simple governance rhythm |

Ask yourself: What is the one process you would pilot first, and who would own it?

2-MINUTE SELF-ASSESSMENT

Rate each 1 (not yet) to 5 (solid). Add it up.

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| 1. We know which processes to automate | ① ② ③ ④ ⑤ |
| 2. Our key processes are documented and standard | ① ② ③ ④ ⑤ |
| 3. Our data is clean, consistent and owned | ① ② ③ ④ ⑤ |
| 4. We can measure success and ROI | ① ② ③ ④ ⑤ |
| 5. We have a way to pilot, monitor and scale | ① ② ③ ④ ⑤ |

Under 15 Readiness first **15 to 20** Pick a pilot **Over 20** Ready to scale

Your lowest-scoring step is where to start on Monday.

IF AN AI AGENT MAKES THE CALL

The five steps still apply. Add these on top.

- ☐ Define clear guardrails: what it can and cannot do alone
- ☐ Keep humans in the loop for consequential actions
- ☐ Set an acceptable-use and oversight policy
- ☐ Scope data access to least privilege
- ☐ Decide how you will verify quality and accuracy
- ☐ Start with low-risk, reversible use cases

Ask: what boundary should it never cross without a human?