Automation Opportunity Worksheet

Start with repeat work you can observe. Use this worksheet to choose one task, define how it should behave, and test whether it helps.

Business / team _____ **Date** _____

01 List the repeat work

Use one reporting period. Record runs in that period and minutes per run before automation.

Task	Runs / period	Minutes / run	Rule to follow	Exceptions	Owner

Reporting period (for example, a week) _____

02 Define the first candidate

Choose a narrow task with clear rules and someone responsible for the result.

Task to test _____

Trigger - what starts it? _____

Inputs - data and sources _____

Expected outcome _____

Duplicate - how to detect it? _____

Failure - alert and recovery _____

Human review - when / who? _____

Owner - who can stop it? _____

Avoid expanding the scope until you can tell whether the first task works reliably. Keep a manual way to complete or correct the work.

Make the estimate testable

Use the same period for every input. Count the human work that remains, including review and correction.

03 Estimate net time

NET TIME FORMULA

Runs x (minutes before - minutes after) - maintenance minutes

Illustration only: 30 x (5 - 1) - 15 = 105 minutes per week.

Period _____ **Runs in period** _____

Minutes before / run _____ **Minutes after / run** _____

Maintenance minutes / period _____ **Net minutes** _____

One-time setup hours _____ **Net hours / week** _____

For a weekly estimate, divide net minutes by 60. Setup break-even weeks = setup hours / net weekly hours, only if net weekly hours are positive.

Estimated setup break-even (weeks) _____

TIME CAPACITY IS NOT THE SAME AS CASH SAVED

Separate available staff time from a real reduction in spend. Record setup fees, subscriptions, and support costs separately; do not treat freed minutes as guaranteed revenue.

04 Pilot before relying on it

Use safe test data. Record expected and actual results, then decide whether to keep, adjust, or stop.

Test case	Expected result	Actual result	Pass / fix
Normal request			
Duplicate request			
Missing / invalid input			
Failure / human handoff			

Pilot owner _____ **Review date** _____

Decision / next change _____

Need a second look?
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