AI Automation Readiness Workbook

Identify useful tasks, map the process and plan where human review belongs.



WHERE YOUR BUSINESS COMES TO LIFE!

01 / AI AUTOMATION READINESS WORKBOOK

Choose one process to explore

01 The repetitive task

Describe a task your team performs often and why it takes effort.

02 The current process

List the inputs, systems, person responsible and expected output.

03 The desired improvement

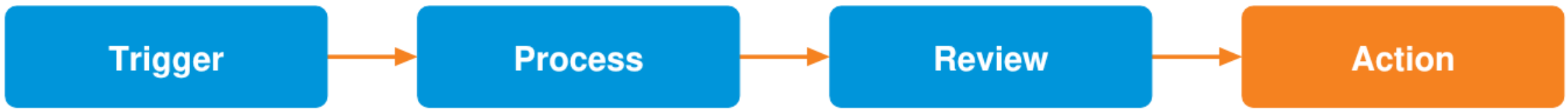
Name a practical goal, such as less manual entry.

Type your answers in the fields, then save a copy. You can also print this worksheet.

Compare possible automation tasks

Possible task	Information needed	Human responsibility
Route an inquiry	Form details and routing rules	Review unusual or unclear requests
Draft a response	Approved knowledge and tone	Check accuracy before sending
Update a CRM record	Mapped fields and access rules	Resolve mismatched or duplicate data
Prepare a summary	Relevant records and a clear format	Verify important facts and actions

Map a workflow before choosing tools



What starts the task?

Which steps should run?

Who checks exceptions?

What happens after approval?

Add a fallback for missing information, failed connections and results that need correction.

Questions to resolve before setup



Access and information

Identify which data is needed, who may access it and which systems are approved for use.



Review and limits

Define what the system may do automatically and which actions require a person.



Failure handling

Name who is alerted, how work is recovered and when the manual process takes over.

Define a small pilot

Pilot element	Decision to record	How to check it
Scope	One process and a limited test group	Keep unrelated tasks outside the pilot
Test cases	Typical, missing and unusual inputs	Compare results with expected outputs
Success measure	Time, accuracy or handoff quality	Use a consistent baseline
Go / revise / pause	An owner and review date	Document the decision and reason

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Your automation pilot brief

01 Workflow and owner

Name the process, systems and responsible person.

02 Review and fallback

List the actions needing approval and the manual alternative.

03 Pilot decision

Write the test period, useful measure and approval date.

Type your answers in the fields, then save a copy. You can also print this worksheet.

YOUR NEXT STEP

Let us help with your next step

Required Marketing Group offers AI consultation, system setup, CRM integration and workflow automation. Bring one process your team would like to improve.



Request a consultation

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