

Automation Opportunity Worksheet

A way to identify which repetitive tasks are actually worth automating first.

List Every Repetitive Task, Then Score Each One

TASK	FREQUENCY	TIME/INSTANCE	TOTAL TIME/MONTH	ERROR-PRONE?	DIFFICULTY
	Daily/Weekly/Monthly			Yes/No	Easy/Medium/Hard

Prioritize Using This Order

1. High time cost + low automation difficulty (the easy wins, do these first)
2. High time cost + high automation difficulty (worth it, but plan for it)
3. Low time cost + low automation difficulty (nice to have, not urgent)
4. Low time cost + high automation difficulty (usually not worth the effort)

Before Automating A Process, Ask

1. Is this process actually well-defined and consistent, or does it change every time?
2. Who will maintain this automation when something changes upstream?
3. What's the fallback if the automation fails; does someone notice, and is there a manual backup?

Process clarity comes first, automation comes second. The businesses that get the most value from automation are the ones that had a clean, well-understood process before they tried to speed it up.