

O P E R A T O R G U I D E

How to Automate Your Business Processes

Start with one repetitive, rules-based task. Automation works when the steps are the same every time and the decision is clear. It does not work when the work changes every time or needs judgment.

01 What to automate first

Look for tasks that happen every day or every week, follow the same steps, and do not need a decision in the middle.

- ☐ Intake forms
- ☐ Follow-up emails
- ☐ Status updates
- ☐ Report pulls
- ☐ Data entry between two systems

02 How to do it

- ☐ Find the task. One task. The one you or someone else does the same way every time.
- ☐ Map the steps. Write them down. If you cannot write them, you cannot automate them.
- ☐ Pick the tool. Use what you already have if it can do the job. Add a tool only if the current one cannot.
- ☐ Build it. Start with the simplest version that removes the manual step.
- ☐ Test it. Run it on real work. Fix what breaks. Then let it run.

03 What not to automate first

- ☐ Do not start with the most complex process.
- ☐ Do not automate a process that is not written down.
- ☐ Do not add a new tool before you have used the one you have.
- ☐ Do not automate something that needs a person to decide in the middle.

04 How to know it worked

The task gets done without anyone touching it. The time it used to take is now free. The errors that came from doing it by hand are gone. If those three are true, it worked.

If you cannot write the steps, you cannot automate them. Write them first.

05 What to do next

Pick one task that happens the same way every time. Write the steps. Automate the first one. Then pick the next.