

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

What to Automate After the First Three Processes

The first three automations remove the most repeated manual work. After those are running, the next ones are the processes that still require a person to move data or send a status. Automate only what is already written down.

01 What to automate next

- ☐ Status updates that still require someone to check and send.
- ☐ Data moves between two systems that still happen by hand.
- ☐ Follow-up sequences that follow a clear rule.
- ☐ Report pulls that happen every week and always look the same.
- ☐ Exceptions that can be flagged so a person only sees what needs a decision.

02 How to choose

Look for work that happens the same way every time. The steps are written. The decision in the middle is rare. If the process still lives in someone's head, write it first. Then automate it.

03 What not to automate yet

Anything that still needs judgment in the middle. Anything that is not written down. Anything that would require a new tool before the current tools are being used. Start with what you already have.

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

04 What to do next

List the processes that still require a person to move data or send a status. Pick the one that happens most often. Write the steps if they are not written. Then automate the first one.