



A FREE WORKING WORKSHEET

The Keep, Stop, Automate Worksheet

Three questions that decide what happens to every piece of work in a process, so your team keeps what matters, stops what has done its job and automates what needs no human judgment.

KEEP

STOP

AUTOMATE

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THE WHOLE THING IN ONE SENTENCE

List every step of one process with the team members who do it, sort each step into keep, stop or automate, and leave with a next step for every decision.

SECTION ONE

Three questions for every piece of work.

Every process in a growing company collects steps over the years. A step gets added for a new customer, a report gets started to answer one question, and a handoff settles with the person who has always handled it. This worksheet helps your team look at each step with fresh eyes and decide what happens to it next.

KEEP

Does this work need to continue?

It serves your customers, your team or the business, so it continues, and you make it clear, owned and measured.

STOP

Has this work done its job?

It served a purpose once, like a report nobody reads anymore. It stops, and your team gets that time back.

AUTOMATE

Does this work need no human judgment?

It follows the same rules every time, so a Digital Employee or a simple automation can handle it, with a person reviewing where it matters.

ABOUT THE WORK, NEVER ABOUT THE TEAM

Keep, Stop, Automate is always about the work, never about the team members who do it. When work stops or gets automated, your team gets time back for the work that needs their judgment, and how that time is used is your decision.

Keep, Stop, Automate is the decision step inside the Growth RIGHT Method, the way Growth Right Solutions works with owner-led companies.

SECTION TWO

Before you start.

Choose one process

Pick one process with a clear starting point and a clear finish, such as a quote request from first call to signed quote, or a new hire from offer letter to first paycheck. One process, done well, teaches your team more than five done quickly.

Bring the people who do the work

The team members who do the process every day know every step, including the ones nobody wrote down. Invite them to the table, and let them describe the work in their own words.

Set the ground rules

1. Write down every step in order before anyone sorts anything.
2. Time each step from records where you can, and mark any estimate as an estimate.
3. Sort each step into keep, stop or automate, and write one sentence about why.
4. The process owner makes the final call when the table is split.
5. Every decision is written down before the meeting ends.

What you need

You need about an hour, one printed copy of the worksheet on page five for each person, and someone to keep the master copy.

A HELPFUL HABIT

If you have mapped the process with One Process on One Page, bring that page. Its steps become the rows on this worksheet.

SECTION THREE

The worksheet.

Process

Starts when

Date

Process owner

Finished when

Team members at the table

#	THE STEP, IN PLAIN WORDS	WHO DOES IT	MINUTES EACH TIME	TIMES PER WEEK	CIRCLE ONE	WHY
1					K S A	
2					K S A	
3					K S A	
4					K S A	
5					K S A	
6					K S A	
7					K S A	
8					K S A	
9					K S A	
10					K S A	
11					K S A	
12					K S A	

K means keep, S means stop and A means automate. Multiply minutes by times per week to see the weekly hours each step uses.

SECTION FOUR

When the call is close.

Most steps sort themselves in seconds. A few take a conversation. These tests help your team decide those few with confidence.

STOP Tests for stopping work

- Who reads or uses what this step produces, and what do they do with it?
- If this step paused for one month, who would notice, and what would they need?
- Does another step or a newer tool already cover what this step does?

AUTOMATE Tests for automating work

- Does the step follow the same rules every time it happens?
- Could you write those rules on one page so a new team member could follow them?
- When something unusual happens, is there a named person the work goes to?
- Is the process around this step already clear and agreed on?

KEEP Tests for keeping work

- Does the step need judgment, care or a relationship that a person brings?
- Does it protect a customer, a team member or the business?
- Does it have a clear owner and a way to know it was done well?

WHEN THE ANSWER IS STILL UNCLEAR

Mark the step Keep for now, give it an owner, and look at it again in ninety days with a baseline in hand.

SECTION FIVE

A worked example.

A home services company maps its quote request process, from the first call to the signed quote, with the office manager and the estimator at the table.

#	THE STEP	WHO	DECISION	WHY
1	A request arrives by phone or the web form.	Office	AUTOMATE	A Digital Employee captures every request the same way and hands it to a person when needed.
2	The office retypes the request into the field system.	Office	AUTOMATE	The same fields move the same way every time.
3	The estimator calls the customer to set the visit.	Estimator	KEEP	The call builds trust before the visit.
4	The estimator visits, measures and writes the quote.	Estimator	KEEP	This is the judgment the customer pays for.
5	The office retypes the quote into a template.	Office	STOP	The estimator writes into the template once.
6	The owner reviews every quote over a set amount.	Owner	KEEP	Large quotes deserve a second look.
7	The office prints a weekly open-quote report.	Office	STOP	Nobody has used it since the field system added a live list.
8	The office follows up on unsigned quotes.	Office	AUTOMATE	Follow-ups go out on day three, seven and fourteen, and every reply goes to the estimator.

The result: three steps are kept and made clear, two steps stop, and three steps are ready to automate once the process is written down and a baseline is recorded.

This example is illustrative. It shows the shape of a completed worksheet, not the results of any particular company.

SECTION SIX

After the worksheet.

The worksheet is worth what your team does with it in the next thirty days. Each decision has a next step.

KEEP

Write the step down in the words of the person who does it, name one owner and choose one way to know it was done well.

STOP

Choose a date, tell everyone who touches the step, and check in thirty days that nobody missed it.

AUTOMATE

Write the rules first, record a baseline, and automate one step at a time, with a named person for anything unusual.

Why automation comes last

We automate a step only after it is clear and your team agrees on it. That way every automation follows the way your company wants to work, and your baseline shows what changed.

When you want help

Your Chief Operating Officer from Growth Right Solutions works alongside you and your leadership team on how the work gets done: we assess every core process, engineer the pieces that are missing, re-engineer the pieces your growth has outpaced, and decide with your team what to keep, what to stop and what to automate.

START WITH A CONVERSATION ABOUT HOW YOUR COMPANY RUNS

It is free, there is no sales and no obligation, and your goals decide where we start.

GrowthRight.Solutions/chief-operating-officer

Companion resources: One Process on One Page and The Baseline, both free at GrowthRight.Solutions/resources.

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About the author

Ed Becker is the founder of Growth Right Solutions, LLC. He spent more than twenty years in education, including as a school principal, before leading technology programs and running a managed services company, and he now leads AI adoption for owner-led companies and Arkansas school districts.

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