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AUTOMATION OPPORTUNITY WORKSHEET / 01

Find the first workflow worth automating.

Start with one repetitive task and one clear owner. Use a typical week of observed work rather than a hoped-for saving.

☐ **01 Choose a recurring handover**

Examples: website enquiry to CRM, approved quote to project checklist, or completed job to a review request. Write the start event and finished result.

☐ **02 Map the current route**

List every tool, person and copy-and-paste step. Include waiting, rework and the places where information goes missing.

☐ **03 Check that the rules are stable**

Can you explain the next action with clear conditions? Keep unusual cases and judgement calls with a person.

☐ **04 Name the exception owner**

If a record is missing, a system is unavailable or a customer opts out, decide who is alerted and how they resume the task.

Workflow to investigate: _____

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AUTOMATION OPPORTUNITY WORKSHEET / 02

Estimate capacity you could recover.

Weekly minutes recovered = tasks per week × minutes per task × share safely automated – weekly review minutes.

Illustrative example: 30 tasks × 6 minutes × 70% – 30 review minutes = 96 minutes, or 1.6 hours per week. These are sample inputs, not a Vendrato result.

Tasks per week _____

Minutes per task today _____

Share safely automated (0–100%) _____

Weekly review / exception minutes _____

Estimated weekly hours recovered _____

Time recovered is not automatically cash saved.

Check setup cost, ongoing subscriptions, message charges, maintenance and the work your team will do with the recovered time. Do not count the same saving twice.

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AUTOMATION OPPORTUNITY WORKSHEET / 03

Write a small pilot your team can test.

☐ **01 Trigger and required information**

What event starts the workflow? What data must be present? Use the actual form, calendar or pipeline stage.

☐ **02 Action and success evidence**

What should change, in which system? Define a visible result: one contact, one task, the correct owner and a recorded source.

☐ **03 Failure and duplicate handling**

Repeat the same event, omit a field and simulate a service failure. Decide when to retry and how to prevent duplicate tasks or messages.

☐ **04 Human handover and rollback**

Document who checks failures, how the automation is paused and how work continues manually. Start with a small controlled sample.

Bring the worksheet to a project call.

We can map the first useful workflow around your existing tools and agree a scope before building.
Book: https://vendrato.com/book