

AUTOMATION READINESS CHECKLIST

Automate a clear job, not a mess.

Check the work before you connect a tool.

USE THIS BEFORE A PILOT

- 01

Choose one repeatable task

Use a bounded task with a recognisable start and finish.
- 02

Write the human decision

State what still needs review, approval or judgement.
- 03

Make a safe test

Keep customers and consequential actions out of the first run.
- 04

Define a fallback

Say who takes over when the route fails or is unclear.

PILOT SET-UP

TASK TO TEST

DATE

PROCESS OWNER

REVIEW OWNER

STOP IF

- ☐

the work is unclear
- ☐

sensitive data is involved
- ☐

a customer could be affected
- ☐

the exception path is unknown

A tool should follow a workable process - not stand in for one.

READINESS REVIEW

Review the work before the tool.

Mark each point only when you can name the evidence or owner.

THE JOB

- ☐ **The trigger is clear**
What starts the work?
- ☐ **The outcome is clear**
What counts as complete?
- ☐ **The inputs are available**
Where do they come from?

THE CONTROL

- ☐ **A human reviewer is named**
Who can stop or approve it?
- ☐ **The exception path is written**
What happens when it cannot continue?
- ☐ **A manual fallback exists**
Who can complete the task without the tool?

THE LEARNING

- ☐ **The test is limited**
What will not happen in the first run?
- ☐ **The evidence is defined**
What will show whether it helped?
- ☐ **The review date is set**
When will the team decide what changes next?

READINESS RESULT

READY TO TEST / NOT YET

SINGLE NEXT ACTION

SAFE PILOT RECORD

Test. Review. Then decide.

Keep the first test small enough to understand what happened.

WHAT WILL THE TOOL DO?

WHAT WILL THE HUMAN REVIEW OR APPROVE?

WHAT WILL THE TOOL NOT DO IN THIS TEST?

WHAT IS THE MANUAL FALLBACK?

WHAT EVIDENCE WILL YOU REVIEW?

WHAT CHANGED AFTER THE TEST?

Practical action: learn from a controlled test before expanding the workflow.