

Workflow Opportunity Worksheet

*Find the repetitive work that is
actually worth automating.*

Automate friction, not chaos.

AI and automation create leverage when the underlying workflow is understood. Start with repeated actions, handoffs, decisions and delays before selecting tools or models.

01 **MAP**

Write the workflow as it happens today, including people, tools, handoffs and exceptions.

02 **FRICTION**

Mark repetitive entry, waiting, copying, searching, status chasing and decisions made from the same information over and over.

03 **LEVERAGE**

Prioritize opportunities where automation reduces time or errors without hiding a critical human judgment step.

Questions worth answering.

- 01 What task repeats most often?

- 02 Where is information copied between tools?

- 03 What causes people to wait for another person?

- 04 Which decisions follow repeatable rules?

- 05 Where must a human remain in control?

NEXT STEP

Bring one workflow - not the whole company - into a systems conversation. The best automation usually starts narrower than expected.