Process Automation Worksheet

Write down one process the way it actually happens, in enough detail that someone (or software) could follow it. Fill it in with the person who does the work, ideally while they do it.

01 The basics

Process name _____ **Owner** _____

Starts when (trigger) _____ **Done when** (result) _____

How often per week _____ **Time per run** minutes _____

Systems used _____ **People involved** _____

02 The steps

#	Step (verb + object)	Who	System / tool	Data used or created	Minutes
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					

One action per row: "Copy order number from email into QuickBooks," not "Process the order." Mark steps that need judgment with a star.

03 Decisions and rules

#	If... (condition)	Then... (what happens)
1		
2		
3		
4		
5		

Write rules with real numbers: "If the order is over $5,000, a manager approves it," not "Big orders get checked."

04 Exceptions

#	What goes wrong or is unusual	How often	What we do about it
1			
2			
3			
4			

05 Waiting and handoffs

#	Where work waits or changes hands	Typical delay	Why
1			
2			
3			

06 Is it ready to automate?

Happens often (weekly or more) and takes real time	Yes / Partly / No
Most steps follow clear rules you could write down	Yes / Partly / No
Inputs arrive digitally (forms, email, files, systems)	Yes / Partly / No
The systems involved can connect (APIs, exports, integrations)	Yes / Partly / No
A mistake would be caught and fixable before it causes harm	Yes / Partly / No

Mostly "Yes"? It's a strong candidate. Mostly "Partly"? Automate the clear steps and keep a person on the rest. Mostly "No"? Fix the inputs or rules first.

Want this done for you? The **Prodjex AI Readiness Audit** maps your workflows and gives you a ranked, costed plan. **prodjex.com/ai-readiness-audit** · (816) 219-1899