

Automation Readiness Checklist

Automation multiplies whatever it is pointed at. These nineteen questions, grouped into five checks, tell you whether you are about to multiply value or multiply a mess.

1. Is the process understood?

If you cannot describe the real path cases take, you are automating a guess.

- Can you name the case, the activities, and the end state?
- Do you have at least one month of event history?
- Do you know the top three variants and what share of volume they carry?
- Do you know the current cycle time and its spread, not just the average?

2. Is it stable enough to automate?

Automating a process that changes monthly buys you a monthly rebuild.

- Has the flow been unchanged for at least one quarter?
- Are the input formats consistent, or does every source arrive differently?
- Is volume predictable enough to size the automation?
- Are exceptions under roughly twenty per cent of cases?

3. Is the control story clear?

An automated process still needs governance — usually more of it, applied faster.

- Which governance rules apply, and are they written as measurable thresholds?
- Who approves what, and does segregation of duties survive automation?
- What evidence must each run produce?
- Who is notified on failure, and inside what window?

4. Are the people ready?

Automation changes jobs. Being explicit about that early is the difference between adoption and quiet sabotage.

- Is there a named process owner with authority to change the flow?
- Do the people doing the work know what changes for them?
- Who supports the automation when it breaks at 7am?

- Has the freed capacity been agreed, rather than assumed?

5. Can you prove the benefit?

If you cannot measure before, you cannot claim after.

- Have you captured the baseline: cycle time, cost per case, rework rate?
- What is the target, and by when?
- How will you detect drift after go-live?

Video walkthrough — key points

1. Automation Readiness

- Five checks
- Nineteen questions

Automation multiplies whatever you point it at. This checklist has nineteen questions in five groups, and it tells you whether you are about to multiply value, or multiply a mess.

2. 1. Understood

- Case, activities, end state
- A month of history
- Top variants and spread

First: is the process actually understood. Can you name the case, the activities and the end state. Do you have at least a month of event history. Do you know your top three variants, and the spread of cycle time rather than just the average. If not, you are automating a guess.

3. 2. Stable

- Unchanged for a quarter
- Consistent inputs
- Exceptions under twenty percent

Second: is it stable. Automating a process that changes every month buys you a monthly rebuild. Look for a flow unchanged for at least a quarter, consistent input formats, predictable volume, and exceptions running under roughly twenty per cent of cases.

4. 3. Controlled

- Rules as thresholds
- Segregation of duties
- Evidence per run

Third: is the control story clear. An automated process needs governance, usually more of it and applied faster. Write the rules as measurable thresholds, check that segregation of duties survives automation, define the evidence every run must produce, and name who is notified on failure.

5. 4. People ready

- Named owner with authority
- Support at seven in the morning

- Capacity agreed

Fourth: are the people ready. Automation changes jobs, and being explicit about that early is the difference between adoption and quiet sabotage. You need a named owner with authority to change the flow, clarity for the people doing the work, a support route when it breaks early in the morning, and an agreed answer for the freed capacity.

6. 5. Provable

- Baseline captured
- Target and date
- Drift detection

And fifth: can you prove the benefit. Capture the baseline before you start — cycle time, cost per case, rework rate. Set a target and a date. And decide now how you will detect drift after go live. If you cannot measure before, you cannot claim after.

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