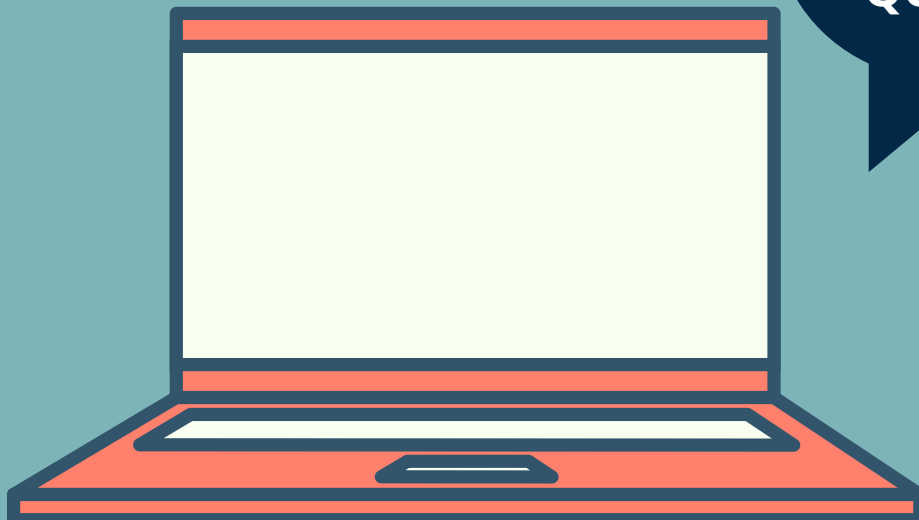# 5 STEP CHECKLIST

TO AUTOMATE OR NOT AUTOMATE

THAT IS THE QUESTION...

ABOUT THIS CHECKLIST

Many entrepreneurs have realized that if they want to scale, they need to streamline their internal business processes. For some, this means using automation, but not all processes are meant to be automated. Before you automate, use this 5 step checklist to help you decide which processes to automate - and which are better done manually.

Why Some Tasks Should Be Automated - and Some Shouldn't

Even with our most advanced machine learning innovations, automation can't always compete with some of our innate human abilities. Customers seek authenticity- an authenticity that only people can flexibly adapt to, create, and complete in such a unique way that no software could ever replace.

Although it's tempting to start automating every task that you've deemed "automation-friendly," be cautious with what tasks you choose. Automating processes just because you can isn't always the best call. In fact, automating for the sake of automating can be "a recipe for failure." Instead, it's important to carefully consider which processes are best left to people, which are okay to delegate to automation, and which should be a hybrid of both.

STEP 1
Identify the potential "automation-friendly" processes.

☐ Identify some of your most automation-friendly tasks, such as tasks that:
  ○ You perform repeatedly
  ○ Are the same every time you do them
  ○ Don't require critical thinking (creativity, decision-making, etc.)
  ○ You don't particularly like doing
☐ Take note of the first tasks that you should consider automating.
  ○ Is there something you need to delegate soon?
  ○ Is it in an area that seriously needs improvement and that dramatically impacts your business?
  ○ Are there tasks that are taking up too much time?
☐ Make sure you're not over-automating. Sometimes too much of a good thing can turn bad. Start with only the "first tasks," then expand into other areas. Don't automate everything all at once.

STEP 2
Identify the processes that are best left to people.

☐ Identify any tasks that you probably should not automate, including tasks that
  ○ Only need to be completed once / are not repeated
  ○ Require human engagement or connection-building
  ○ Need to be evaluated on a case-by-case basis
  ○ Require unique skill sets, expertise, intellect, decision-making abilities, or creativity

STEP 3
Identify tasks that require both automation and people.

☐ Take note of processes that involve both automation-friendly tasks and human-only tasks.
  ○ For example: scheduling a recruiting interview and actually interviewing the person
☐ Take note of processes that involve both automation-friendly tasks and human-only tasks.

STEP 4
Compare the ROI for the manual and automation tasks and prepare for change.

☐ Analyze the resources needed for completing the task manually and automatically.
  ○ Does automating it cost more money?
  ○ Does completing it manually take more time?
  ○ How many people are needed to complete it manually?
☐ Make sure to estimate the time/cost savings that automating a process will give, and compare that to the time/cost it will take to actually automate the process.

STEP 5
Find the right software to automate your processes.

☐ Research popular business process automation software to find the right one for your business.
☐ Consider reading through review sites (for example: G2Crowd) to see what others say about the software.
☐ Select a software based on your goals and the process area(s) you plan to automate.
  ○ For instance, Zapier would be best used to connect multiple applications; and ActiveCampaign would be best used for automating your email marketing.
☐ Find an automation platform that has the flexibility to grow and adapt to future changes in your development process.