BUILD3R
Your Software Development Team

Automation Planning Worksheet

Map your processes, calculate hours saved, and prioritize what to automate first. Complete sections 1–2, then use sections 3–4 to decide and act.

🗺️ 1. VALUE STREAM MAP

Pick one process. Map every step from trigger to completion. Be honest about time and handoffs.

Process name: _____

| **Trigger** What starts it? | → | Step 1 ___min / _____ | → | Step 2 ___min / _____ | → | Step 3 ___min / _____ | → | Step 4 ___min / _____ | → | **Done** Output? |

Under each step: time in minutes / who does it. Circle steps that are manual, repetitive, or error-prone — those are automation candidates.

STEP	DESCRIPTION	TIME (MIN)	WHO	MANUAL?	ERROR-PRONE?
1				☐	☐
2				☐	☐
3				☐	☐
4				☐	☐
5				☐	☐
6				☐	☐

⏱️ 2. HOURS RECLAIMED CALCULATOR

Estimate the time you'll save. Multiply time × frequency to see weekly hours recovered.

PROCESS / TASK	TIME PER OCCURRENCE	FREQUENCY (PER WEEK)	WEEKLY HOURS	MONTHLY HOURS
e.g., Data entry from forms	*15 min*	*20×*	*5.0 hrs*	*20 hrs*
TOTAL WEEKLY HOURS →				

> 💡 **Rule of thumb:** If a task takes >2 hours/week and follows predictable rules, it's a strong automation candidate.

🎯 3. PRIORITY SCORING MATRIX

Score each automation candidate on three dimensions (1 = low, 5 = high). Impact × 2 – Effort – Risk = Score. Highest score wins.

AUTOMATION CANDIDATE	IMPACT (1-5)	EFFORT (1-5)	RISK (1-5)	SCORE (I×2−E−R)	RANK
e.g., Invoice processing	4	2	1	5	#1

Impact (1-5)
1 = Saves a few minutes
3 = Saves hours weekly
5 = Transforms the workflow

Effort (1-5)
1 = Simple integration
3 = Custom build needed
5 = Major infrastructure change

Risk (1-5)
1 = Low stakes, easy rollback
3 = Customer-facing process
5 = Compliance/financial risk

🚀 4. IMPLEMENTATION CHECKLIST

For your #1 priority. Complete before going live.

Automation to implement: _____

BUILD
- ☐ Tool/platform selected
- ☐ Workflow mapped end-to-end
- ☐ Error handling defined
- ☐ Test data prepared
- ☐ Integration access confirmed

TEST
- ☐ Happy path tested (≥5 runs)
- ☐ Edge cases tested
- ☐ Failure mode tested
- ☐ Output quality validated

MONITOR
- ☐ Success/failure alerts configured
- ☐ Execution logs enabled
- ☐ Performance baseline recorded
- ☐ Review cadence set: ☐ Daily ☐ Weekly

OPERATIONALIZE
- ☐ Owner assigned: _____
- ☐ SOP documented
- ☐ Team trained on new process
- ☐ Old manual process retired
- ☐ 30-day review scheduled: _____

> 💡 **Don't automate broken processes.** Fix the process first, then automate the fixed version. Automating chaos just produces faster chaos.