



Identify Automation Opportunities

Key Takeaways

Choose Strategic Starting Points

Success in automation begins with selecting the right process. Look for frequent, repetitive tasks that follow consistent steps and impact multiple teams. By identifying workflows with clear patterns and measurable outcomes, you create the foundation for automation success and build momentum for future initiatives.

Start Small to Build Momentum

Starting with a single, high-impact process builds momentum and proves automation's value. Automating a frequent task—like email creation—shows quick wins in time savings and accuracy. A successful first step encourages buy-in and lays the foundation for broader automation success.

Measure Real Impact

Success in automation begins with measurable objectives. Taking time to document current metrics, set specific targets, and define what improved operations look like gives your team a clear roadmap. By establishing concrete goals upfront, you can better track progress and demonstrate the real impact of your automation initiatives.

Share Success

Tracking key metrics like time saved, cost reductions, and error improvements proves automation's impact. Regular updates and success stories help stakeholders see the value, while feedback loops refine future efforts. Sharing wins builds support and drives broader adoption.