

Automation Decision Pack

Choose one real recurring workflow. Complete one section after each course module. The finished workbook gives leadership, users, and an implementation partner a decision they can inspect and challenge.

A useful result may be to proceed, investigate a gap, repair the process, or stop. This workbook does not assume the workflow should be automated.

Course progress

Module	Lesson	Exercise	Reviewed
1	☐	☐	☐
2	☐	☐	☐
3	☐	☐	☐
4	☐	☐	☐
5	☐	☐	☐
6	☐	☐	☐

Learner

Workflow or business area

Date started

1. Workflow shortlist

Turn broad frustrations into observable workflows. Name the trigger, outcome, sponsor, and operating owner before comparing solutions.

Recurring friction	Trigger	Observable outcome	Sponsor	Operating owner	4 filters

Four filters: repeated, bounded, owned, and consequential.

Candidate selected for mapping

Boundary: when [trigger], the workflow is complete when [observable outcome]

Recent case you will reconstruct

2. Current-state map

Follow one recent case. Record the actual actions, systems, decisions, handoffs, waits, and exceptions.

#	Actor	Action or decision	System / source	Hands-on	Wait	Exception / gap
1						
2						
3						
4						
5						
6						
7						
8						

Total hands-on time: _____ Total elapsed time: _____

Three strongest friction points

Details that still need verification

3. Opportunity scorecard

Score each factor from 1 (weak) to 5 (strong). Keep the evidence beside the score. Do not hide the dimensions in one total.

Dimension	Factor	1-5	Evidence or assumption
Business value	Frequency and volume		
	Time or delay		
	Error or rework		
	Business consequence		
Readiness	Boundary and rule clarity		
	Input quality and access		
	Examples and exceptions		
	Business and system ownership		
Risk control	Failure is detectable		
	Outcome is reversible		
	Sensitive data is controlled		
	Human review is practical		

Decision

☐ Proceed to design ☐ Investigate a named gap ☐ Repair first ☐ Stop

Rationale

4. Responsibility map

Label each key step Repair, Automate, Assist with AI, or Keep Human. Name the owner and the consequence of a wrong result.

Workflow step	Mechanism	Why it fits	Reviewer / owner	Consequence if wrong

Human review gate

Reviewer

Evidence shown

Available actions and response expectation

5. First-release brief

Define one useful operating result. Make included cases, exclusions, failure paths, and human review explicit.

Field	Reviewed answer
Trigger	
Observable outcome	
Included sources, users, cases, and volume	
Excluded cases and their continuing path	
Required fields, systems, and permissions	
Rules and AI tasks	
Human gates	
Failure and fallback paths	
Operating owner	

Acceptance cases

Case	Input or condition	Expected action	Evidence to inspect
Normal			
Incomplete			
Conflicting			
Duplicate			
Sensitive / high consequence			
System failure			

6. Measurement and ownership

Record the baseline, assign the owners, test the launch controls, and schedule the first operating decision.

Field	Reviewed answer
Primary outcome measure	
Population and period	
Source and calculation	
Current baseline	
Business owner	
System owner	
First review date	

Operating measures

☐ Volume ☐ Completion ☐ Failures ☐ Review rate ☐ Corrections ☐ Elapsed time

Launch controls

☐ Cases passed ☐ Users trained ☐ Logs verified ☐ Fallback tested ☐ Scope limited ☐ Review scheduled

30-day decision

☐ Expand ☐ Revise ☐ Stop ☐ Investigate

7. Capstone review

A passing Decision Pack scores at least 10 of 12 points and has no missing section.

Criterion	0: missing	1: partial	2: decision-ready	Score
Boundary	Broad goal	Start or finish unclear	Trigger, outcome, sponsor, and owner	
Current state	Idealized diagram	Steps without evidence	Recent case, time, waits, and exceptions	
Scorecard	Unsupported total	Some evidence	Value, readiness, and risk visible	
Responsibility	Everything is AI	Review unnamed	Mechanism and reviewer named	
First release	Feature list	Failure paths missing	Scope, fallback, and cases complete	
Operations	No baseline or owner	One is incomplete	Auditable baseline, owners, and review	

Final next decision

☐ Technical discovery ☐ AI Success Audit ☐ Strategy Day ☐ Repair internally ☐ Stop

Bring this Decision Pack to the next conversation. Keep assumptions visible and update the evidence when the workflow changes.

flowgrammer.ca/courses/choose-your-first-ai-automation-workflow