READINESS BRIEF

Is this workflow ready for automation?

A working brief for an operations lead, technical owner and decision-maker to complete together. Use it to surface the evidence needed for the next step.

A practical working brief

Name the workflow and establish the starting point.

Understand the information and dependencies.

Design the review and the next investment decision.

Complete the prompts together. Record what is known, what needs investigation and who can confirm it.

Describe a specific workflow and expose its unanswered questions. This is a planning aid, not a certification, audit or automatic readiness score.

DEFINE THE OPPORTUNITY

1. Define the work

Name the trigger, the result and the person accountable. Keep the scope narrow enough that the beginning and end are recognisable.

What starts the workflow?

What does a complete result contain?

Who owns the outcome?

Capture: A one-sentence scope and a named owner.

2. Establish the starting point

Observe a representative sample. Separate active work, waiting and correction. Record the period and how the observations were gathered.

How often does the task occur?

Where is time spent?

What does an exception look like?

Capture: A baseline with its measurement method and known gaps.

UNDERSTAND THE DEPENDENCIES

3. Understand the information

Identify the source records, permission to use them, their quality and any restrictions on the tools that may process them. Resolve access questions with the organisation's responsible owner.

Which information is necessary?

Is it complete and available in a usable form?

Who can approve its use and access?

Capture: A source list, access owner and unresolved information questions.

4. Map the dependencies

List the systems, teams and suppliers the workflow depends on. Include the connection you would need and who can confirm that it is available.

Which systems need to exchange information?

Who controls each integration?

What happens if a dependency is unavailable?

Capture: A dependency map with an owner for each connection.

AGREE THE NEXT STEP

5. Design the review

Decide what the software can prepare or execute and which actions require a person to decide. Give exceptions an owner and define the context they need.

Where is judgement required?

Who can amend, reject or approve the output?

How will mistakes and exceptions be found?

Capture: A review point, an exception route and representative test examples.

6. Decide what would justify investment

Set an observable success measure and the costs to investigate. Include operating effort and review time. Agree the evidence needed before moving beyond a first stage.

What improvement matters to the organisation?

What will implementation and continued operation require?

What result would cause you to expand, change or stop?

Capture: A proposed first stage and an explicit decision point.

Bring the unknowns to the conversation.

You do not need every answer before speaking to us. A clear workflow and an honest account of the gaps are enough to make the first discussion useful.