

Process inventory worksheet

The raw material of every good automation decision: your recurring work, written down and scored. Fifteen honest rows beat any strategy day.

01 How to fill it

One row per recurring process. Score frequency and pain 1-5; note who owns it and the systems it touches. Duplicate this page as needed.

02 Processes

Process 1: what happens, in one line

frequency / pain / owner / systems touched

Process 2

frequency / pain / owner / systems

Process 3

frequency / pain / owner / systems

Process 4

frequency / pain / owner / systems

Process 5

frequency / pain / owner / systems

Process 6

frequency / pain / owner / systems

03 First reading

High frequency + high pain + rules fit on a page: your first automation candidates

Anything touching client personal data flagged for the governance checklist

Top three candidates, in order