

Before you automate

Map one process. Choose a useful first step.

Choose one recurring workflow. Fill this in with the people who do the work, then decide whether to simplify it, test automation or investigate further.

Process _____

Date _____

01 Start and finish

What triggers the work? What observable result marks it complete?

02 People and responsibility

Who does each step, approves the result and handles exceptions? Name a backup.

03 Current effort and delay

How often does it happen? Measure hands-on time, waiting and rework.

04 Inputs and access

Which records, systems and permissions are needed? Which source is authoritative?

05 Rules, AI and judgment

Which steps follow fixed rules? Where is information unclear or a person needed?

06 Failure and recovery

What if data is missing, duplicated or wrong, or a system is unavailable?

07 Full cost and ownership

Count setup, software, usage, review and maintenance. Who owns accounts and can export data?

08 Pilot and decision

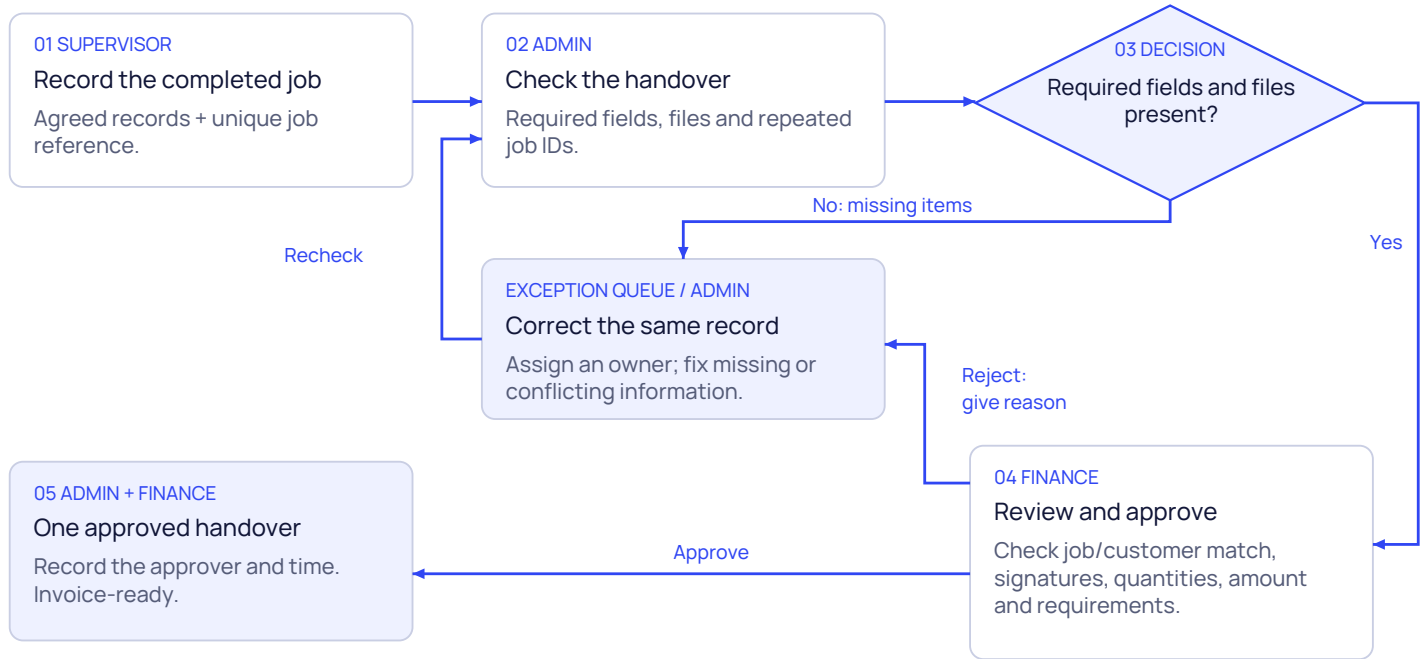
Choose a small test, success measure and stop condition. Simplify, test or investigate?

Sketch the steps, people and exception paths on the reverse or a separate sheet.

Completed job to invoice-ready

Fictional worked example. This is not an Aitsa client result or a universal customer-document requirement.

A PROCESS MAP: THE DECISIONS AND THE WAY BACK



Presence does not prove correctness. Invoice creation, submission, customer acceptance and payment are later stages.

01 Start and finish

Start: a job is marked complete. Finish: finance approves one invoice-ready handover record. Invoice creation, submission, acceptance and payment are outside this pilot.

02 People and responsibility

Supervisor confirms the job and documents. Admin checks and chases missing items. Finance approves. Name an admin backup before the pilot.

03 Current effort and delay

Record job volume, admin minutes, missing documents and elapsed time to finance approval. Collect a baseline before claiming a saving.

04 Inputs and access

Use the job record, signed delivery note and customer purchase-order reference. Confirm the customer's actual requirements and approved storage.

05 Rules, AI and judgment

Rules check required fields and repeated job IDs. A person checks supporting evidence, quantities and amounts. AI is unnecessary for this first pilot.

06 Failure and recovery

Missing or conflicting records stay in an exception queue with an owner. Recheck corrected records. Retry without creating another handover; keep a manual route.

07 Full cost and ownership

Check existing software first. Include setup, subscriptions, admin review and upkeep. Confirm account ownership, export and a support contact before proceeding.

08 Pilot and decision

Test a small agreed set of fictional jobs, including missing paperwork, duplicates and a rejected approval. Compare accuracy and elapsed time with the baseline before a live pilot.