

Getting started:
Workflow automation checklist

#1 Are the steps of your key workflows documented?

- **Yes!**
 - ▷ Congratulations, you're on track to automate your way to stress-free days.
- **Not yet!**
 - ▷ No worries, here's what you need to do next:
 - ▷ Identify key workflows.
 - ▷ Connect with your team on the steps each process entails.
 - ▷ Document each step.

#2 What workflows should you automate?

What to ask	What to look for
1. What are the steps of the process today?	Minimal critical thinking involved.
2. Who does what?	Bottlenecks involving key people.
3. How long does it take?	Takes too much of your valuable time.
4. How often does this occur?	High frequency processes.
5. What is the customer experience during this workflow?	Slow responses, mishaps, poor communication.
6. What are other staff doing while this step is worked on?	Your team is blocked and progress stops.
7. What would be the impact of automating this?	Cash flow, customer satisfaction, sales throughput, employee satisfaction.

#3 Are you ready to automate?

- If you answer yes to any of the following, you're ready for automation.
 - ▷ Have you recently scaled?
 - ▷ Are the processes that once worked for you no longer effective?
 - ▷ Do key people in your company, like the owners, cause bottlenecks?
- If you answer no to all of the above, then now is not the time.

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