

AUTOMATION READINESS / FILLABLE CHECKLIST

Automation Readiness Checklist

Define one repeatable task, check the controls and learn from a limited test before deciding what changes next.

01 Define the test

Choose a task with a recognisable start and finish. Name the human decision, keep customers and consequential actions out of the first run, and define who takes over when it fails.

Fill the shaded fields in a PDF reader that supports forms, or print and write. Save a copy, close it and reopen it to check your entries. Keep answers brief; use a separate sheet for more detail. Do not enter passwords or other secrets.

Task to test

Date - DD/MM/YYYY

Process owner

Human review owner

What starts the task?

What counts as complete?

02 Stop if

1. the work is unclear
2. sensitive data is involved
3. a customer could be affected
4. the exception path is unknown

If any condition applies, do not run this pilot. Resolve it or choose a different, safely bounded test. Reference authorised records; do not copy sensitive information into this worksheet.

AUTOMATION READINESS / EVIDENCE REVIEW

Review the job and controls

Choose Confirmed only when you can name the evidence or accountable owner. Use Not yet for missing or uncertain answers.

03 The job

1. The trigger is clear - What starts the work?

☐ Confirmed ☐ Not yet

2. The outcome is clear - What counts as complete?

☐ Confirmed ☐ Not yet

3. The inputs are available - Where do they come from?

☐ Confirmed ☐ Not yet

Evidence or owner for points 1-3

04 The control

4. A human reviewer is named - Who can stop or approve it?

☐ Confirmed ☐ Not yet

5. The exception path is written - What happens when it cannot continue?

☐ Confirmed ☐ Not yet

6. A manual fallback exists - Who can complete the task without the tool?

☐ Confirmed ☐ Not yet

Evidence or owner for points 4-6

AUTOMATION READINESS / WORKING DECISION

Decide whether to test

Define what you need to learn, then make a decision for this stated test.

05 The learning

7. The test is limited - What will not happen in the first run?

☐ Confirmed ☐ Not yet

8. The evidence is defined - What will show whether it helped?

☐ Confirmed ☐ Not yet

9. The review date is set - When will the team decide what changes next?

☐ Confirmed ☐ Not yet

Evidence or owner for points 7-9

06 Readiness result

Record your working decision

☐ Ready to test ☐ Not yet

Choose Ready to test only when all nine points are confirmed and none of the page 1 stop conditions applies. This is not a safety certification or approval for wider use.

Single next action

Action owner

Review date - DD/MM/YYYY

AUTOMATION READINESS / PLAN AND REVIEW

Safe pilot record

Complete the plan before testing. Afterwards, record errors, uncertainty and the work a person still had to do.

07 Before the test

What will the tool do? Include the input, output and test limit.

What will the human review or approve? Name the reviewer.

What will the tool not do in this test?

What is the manual fallback? Say who takes over and when to stop.

What evidence will you review, and where will it be recorded?

08 After the test

What happened, what changed and why is the next decision appropriate?

Next decision

☐ Stop

☐ Revise and retest

☐ Another controlled test

AUTOMATION READINESS / FICTIONAL WORKED EXAMPLE

An internal action-list test

This invented example shows the detail to record. It is not a client result, a tool recommendation or evidence of expected performance.

09 Keep the test bounded

Task and boundary	Turn six made-up action records into a draft checklist in a separate test document. No real customer, staff or sensitive data is used. The tool cannot send messages, edit live systems or assign work.
Trigger and input	The reviewer supplies an invented test set prepared for this exercise. The test starts only when the records are ready.
Complete means	Each complete record appears with its original action, owner and due date. Missing information is flagged for review rather than completed by guessing.
Human control	The operations coordinator checks every output. If an owner or date is missing, stop that record and flag the gap. The coordinator can format the list manually from the same records.
Evidence and review	Compare all six records with the output. Note omissions, invented details and corrections. Review immediately after the test, before further use.
Illustrative result	Five complete records were copied correctly. The sixth had no owner and was flagged without one being invented. The reviewer still checked every output.
Next decision	Plan another controlled test with different invented records. This result does not justify using live data or expanding access.

Apply the questions to your task: what is the test boundary, which output needs human judgement and what would make you stop? Return to the readiness review if anything is uncertain. Wider use needs its own review of scope, controls and consequences.