

Should you automate this?

A practical process mapping worksheet for small businesses. Fill this in before you automate anything. It is the step that decides whether the automation works.

Most small-business processes fit on a single page. Writing one down usually turns up two or three fixes that need no technology at all, and occasionally shows that the process should not be automated. Both outcomes are worth 25 to 40 minutes.

Process			
Owner		Runs	times / week
Main system(s)		Biggest frustration	

1 Trigger

What starts this process? Be specific. "A customer enquiry" is vague. An email to the office address, a website form and a phone call are three triggers, and they may need handling differently.

2 Steps, in order

Every step, with who does it and which system it happens in. The system matters as much as the person: every change of system is a handoff, and handoffs are where time and accuracy leak.

3 Decisions

Wherever the process branches, what decides the branch? Push past “you just know”. Ask for one example that went each way, and what was different. Rules that live only in someone’s head cannot be automated.

4 Exceptions

What goes wrong, how often, and what happens then. The customer does not reply. The file is the wrong format. The payment is short. If only the happy path is recorded, you will automate the easy half.

5 Volume and time

How often does this run, and how long does each step take? Order of magnitude is enough. This is what tells you whether the process is worth spending money on, and you cannot answer it from memory.

6 What “better” would mean

One or two measures, written down before anything changes. Time from enquiry to quote. Invoices needing correction. Hours per week. Without this you will judge the result on whether it feels nicer.

Then, make three passes

- **Delete**
Which steps exist for no current reason? Approvals nobody refuses, reports nobody reads, records kept for a system that is gone. Removing them costs nothing and takes effect immediately.
- **Simplify**
Which handoffs could disappear? Every time information moves between systems or people is a candidate.
- **Automate what is left**
By this point the candidates are obvious, and so is the order. Automating before deleting makes the pointless work permanent.

Notes

Want a second pair of eyes on it?

Send me your completed map. I will identify the first two or three things I would investigate, including if I would recommend simplifying the process instead of automating it.

optimaition.agency/contact

Appendix: worked example

How the worksheet looks once it is filled in. This one is a small consultancy handling website enquiries.

1 Trigger

New submission received through the website contact form.

2 Steps, in order

1. Form submitted in Webflow. 2. Sarah receives a notification email. 3. Sarah copies the details into HubSpot. 4. Sarah checks service and location fit. 5. Sarah drafts a reply and sends it.

3 Decisions

Is the lead in our service area? If yes, quote. If no, refer out. Sarah decides from the postcode.

4 Exceptions

Missing phone number. Duplicate enquiry from the same person. Service request too vague to quote.

5 Volume and time

18 to 25 enquiries a week. About 8 minutes each before a reply is sent. Roughly 2 a week need rework because information is missing.

6 What “better” would mean

Average enquiry-to-first-response under 15 minutes. Less than 2 minutes of staff handling per standard enquiry.