

WORKSHEET | FREE RESOURCE

AI Automation Opportunity Planner

Who it is for	Managers who want to automate repetitive work without losing control
What you will get	List the repetitive tasks in your business, score them, and decide which to automate fully, which need approval and which stay manual.
Time needed	About 45 minutes with your team

Automation works best on tasks that repeat, follow clear steps and use information that is already in a system. This worksheet helps you find them. Fill it in with the people who do the work. They know where the time goes.

Step 1. List repetitive tasks

Write down tasks that someone does at least weekly. Aim for six to ten. Include small ones. Small tasks add up.

Task	How often	Minutes each time	Who does it	Tools involved
Send quote follow-up email	10 a week	8	Office admin	Email, spreadsheet

Step 2. Score each task

For each task from Step 1, answer these five questions. The first four should be yes. The last one tells you how careful to be.

- ☐ Is the task repeated at least weekly?
- ☐ Are the steps almost always the same?
- ☐ Is the information it needs already in a system, not on paper or in someone's head?
- ☐ Would a mistake be easy to spot and fix?
- ☐ Could a mistake harm a customer, cost real money or break a rule? (If yes, add an approval step.)

Step 3. Choose how much a person stays involved

Level	What it means	Example
Automatic	Runs on its own. Low risk and easy to undo.	Sending a booking confirmation.
Approval needed	A person reviews before it goes out.	AI-drafted customer emails. Quotes above an amount you set.
Stays manual	A person does it.	Pricing exceptions, complaints and anything that needs health, legal or safety judgment.

Step 4. Before you start

- ☐ One named person is responsible for each automation.
- ☐ We know what we will measure, such as hours spent, errors or delays.
- ☐ We have decided what happens when the automation fails.
- ☐ We know what customer information the tool will see and where it is processed.
- ☐ Staff know the change is coming and who to ask about it.

Next step

Want a second opinion on your list? We will review it with you and tell you what we would automate first.

Talk to NEXORA: growth@nexorayyc.io | nexorayyc.io/contact

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