

# Automation Readiness Scorecard

Rate each area from 1 (strongly disagree) to 5 (strongly agree). This will help you identify which workflows are ready to automate and which need groundwork first.

## Process Documentation

Statement	1	2	3	4	5
We have documented SOPs for our key recurring workflows	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Team members follow consistent steps (not everyone does it differently)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We know exactly which tools are used at each step	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Handoff points between people/teams are clearly defined	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Process Documentation Subtotal:</b>					__ / 20

## Data Readiness

Statement	1	2	3	4	5
Our data lives in systems with APIs or export capabilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Key fields are standardized (consistent formats, naming conventions)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We have a single source of truth for critical business data	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data quality is good enough that automation won't amplify errors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Data Readiness Subtotal:</b>					__ / 20

## Tool Stack

Statement	1	2	3	4	5
Our main tools (CRM, PM, finance) support integrations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We're on current/supported versions of our software	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We have admin access to configure workflows and connections	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our team is comfortable adopting new tool features	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Tool Stack Subtotal:</b>					__ / 20

## Business Case

Statement	1	2	3	4	5
We can quantify the time spent on manual tasks we want to automate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Errors from manual work have caused real business impact	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The process runs frequently enough to justify automation investment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Leadership supports investing time in automation projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Business Case Subtotal:</b>					__ / 20

## Change Management

Statement	1	2	3	4	5
The team is open to changing how they work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We have someone who can own and maintain automations long-term	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We're willing to standardize before automating	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We have realistic expectations (automation reduces work, not headcount)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Change Management Subtotal:</b>					__ / 20

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## Total Score Interpretation

Score	Readiness Level	Recommended Action
80–100	Highly Ready	Start automating now. Focus on highest-ROI workflows first.
60–79	Mostly Ready	Minor prep needed. Fix data quality or documentation gaps first.
40–59	Partially Ready	Foundational work required. Standardize processes before automating.
20–39	Not Yet Ready	Focus on documentation, data cleanup, and tool evaluation first.

**Your total score: \_\_\_\_ / 100**

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Ready to automate? Book a free diagnostic to identify your highest-ROI workflows.

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