# Before you automate a task, work through real examples of it

Pick one task your team repeats. With the person who does it, gather recent examples as they were done (the reports, emails or files) and fill in the sheet.

**FICTIONAL** The business, people and figures below are invented to show how to fill in the sheet. This is not a PFMR client or a record of results. Page 2 is the same sheet, blank.

## 1 The task

One example is one full run of the task, start to finish: a day's orders, a week's timesheets, one month-end.

**Task** · one task your team repeats

Overdue invoice reminders

**One example is** · your unit for this task

One Monday batch: the overdue report, every reminder sent and the notes made

**Done by** · fill this in with them

Office manager, with the owner

## 2 Recent examples

One row per example. Count every minute: preparation, the work, checking, exceptions and corrections.

| **Example** date or ref | **Inputs missing, late or wrong** what it was and where it came from | **Steps that differed** what changed, and why | **Total minutes** every step |
|---|---|---|---|
| Mon 5 Oct | One customer had paid by bank transfer. The payment was not yet matched in the accounts system. | None | 85 |
| Mon 12 Oct | A payment plan agreed by phone was not recorded in the accounts system. | A disputed invoice was handled by phone. | 95 |
| Mon 19 Oct | Two bank transfers not yet matched in the accounts system. | None | 90 |
| Mon 26 Oct | None found | None | 75 |

## 3 What the examples show

Examples help you understand the task. They don't prove automating it is safe or worth it.

**Input problems, and where they start** · each entry in the inputs column

Unmatched transfers (5 and 19 Oct): the accounts system is not updated before the report runs. Unrecorded plan (12 Oct): plans agreed by phone are not entered.

**If an output is wrong** · who sees it, and can it be undone?

The customer sees it. A sent email cannot be recalled, so the office manager would phone to apologise.

## 4 Trial brief

Hand this section to whoever configures the tool, in your team or at your provider.

- ☐ **Keep it manual for now** — You can't fill in "A correct result", or checking means redoing the work.
- ☑ **Fix the inputs, then trial** — Section 3 lists an input problem that would make an output wrong.
- ☐ **Trial now** — Section 3 lists no input problems, or the stop rule catches them all.

**Fix first** · the change at the source, and who makes it

Bookkeeper matches bank payments by 9am Monday. Office manager records plans and disputes when agreed.

**Trial starts when** · what the trial owner must see first

The owner has checked the Monday batches after the fix and agrees both problems have stopped.

**In scope** · the exact part the tool will do

Drafting each Monday batch of reminders from the overdue report.

**Stays manual** · steps that differed or need judgement

Disputed invoices, and the two largest accounts the owner phones.

**Trial owner** · decides on the trial and its checks

The business owner

**Checker** · checks outputs during the trial

Office manager

**Needs approval before it goes out** · which outputs, using section 3

The whole Monday batch, every reminder read before it is sent.

**A correct result** · what the checker looks for each time

Right customer, invoice and amount. No paid, payment-plan or disputed invoices. Approved wording.

**Stop rule** · inputs that make an item stop, and who is told

Part payment, payment plan, dispute or no email address: held back and listed for the office manager by 10am.

**Fall back to manual when** · and who is told

A reminder reaches a customer who has paid or has a payment plan. That Monday batch goes by hand; the owner is told.

**Evidence to record** · for every example in the trial

For every Monday batch: errors the checker caught, items stopped, total minutes including approval.

**Owner review** · when, with whom; checks change only here

After the first month, with the office manager: continue, change the checks or stop.

# Your task, worked through the same way

Fill this in with the person who does the work, in the same order as page 1. Use another copy if you have more examples.

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**Task** · one task your team repeats

**One example is** · your unit for this task

**Done by** · fill this in with them

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| | | | |
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**If an output is wrong** · who sees it, and can it be undone?

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☐ **Fix the inputs, then trial**
Section 3 lists an input problem that would make an output wrong.

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Section 3 lists no input problems, or the stop rule catches them all.

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**Trial starts when** · what the trial owner must see first

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