

AI Automation Readiness Checklist

8 questions to find your highest-ROI automation opportunities

Not every process should be automated. This checklist helps you identify which manual workflows in your organization are costing the most time, which ones are ready for automation today, and where AI adds real value versus simple rule-based logic.

1. Process Audit

Check every statement that applies to your organization. Each “yes” is a potential automation candidate.

- Someone regularly copies data between two systems.** *e.g. CRM to spreadsheet, ERP to email, form submissions to database*
- You send the same email or message more than 5 times per week.** *e.g. order confirmations, status updates, onboarding instructions, follow-ups*
- Approval workflows live in email threads or chat messages.** *e.g. expense approvals, content reviews, purchase requests forwarded manually*
- Someone manually creates reports by pulling data from multiple sources.** *e.g. weekly KPI reports, month-end summaries, client status updates*
- New employee or customer onboarding requires a checklist that someone tracks by hand.** *e.g. account creation, access provisioning, welcome sequences, document collection*
- You classify, sort, or route incoming requests manually.** *e.g. support tickets, sales leads, invoices, job applications, inbound emails*
- Documents are reviewed or summarized by a person before being forwarded.** *e.g. contract review, resume screening, meeting notes distribution, RFP analysis*
- You have a process that breaks when one person is out of office.** *This signals a manual bottleneck with no fallback. Prime automation target.*

2. Score Your Results

CHECKMARKS	READINESS LEVEL	RECOMMENDED ACTION
0 – 2	Low	Your processes may already be efficient, or the pain points are elsewhere. Consider a process mapping exercise first.
3 – 5	Medium	You have clear automation candidates. Start with the one that affects the most people or runs most frequently.
6 – 8	High	Significant time is lost to manual work. A structured automation roadmap will show ROI within weeks.

3. Priority Matrix

For each process you checked, plot it on this matrix to decide what to automate first.

	LOW EFFORT (DAYS)	HIGH EFFORT (WEEKS)
High Impact	Do first. Quick wins with clear ROI. Typically rule-based automations.	Plan and build. Worth the investment. Often requires AI for judgment calls.
Low Impact	Automate if easy. Small wins that build momentum and team buy-in.	Skip for now. Effort exceeds value. Revisit when tooling improves.

4. Quick Wins for DACH SMBs

Five processes we see automated most often in German-speaking SMBs, with typical results.

PROCESS	BEFORE	AFTER	TYPICAL SAVINGS
Invoice processing	Manual data entry from PDF to ERP		4 – 8 hrs/week

PROCESS	BEFORE	AFTER	TYPICAL SAVINGS
		AI extracts fields, auto-creates entries, flags exceptions	
Lead qualification	Sales rep reviews every inbound lead manually	AI scores leads, enriches data, routes to right rep	60% faster response time
Report generation	Analyst pulls data from 3+ sources into slides	Automated data pull, formatted report, delivered on schedule	1 – 2 days/month
Employee onboarding	HR follows a spreadsheet checklist per new hire	Triggered workflow: accounts, access, docs, welcome sequence	3 – 5 hrs per hire
Support ticket routing	Agent reads ticket, assigns category and priority	AI classifies intent, priority, routes to specialist queue	80% auto-routed correctly

Rule-based vs. AI: When do you need AI?

Use rule-based automation when the logic is deterministic: “if field X equals Y, then do Z.” This covers data transfer, notifications, simple routing, and scheduled tasks.

Add AI when the task requires judgment: classifying unstructured text, summarizing documents, scoring leads based on multiple signals, or generating personalized responses. AI handles the gray areas that rule-based systems cannot.

Want to walk through your results?

Book a free 30-minute discovery call. We will review your checklist results together, identify your top 2–3 automation opportunities, and outline a concrete plan with timelines.

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