

Automate Your Business. Save Money. Reclaim Time.

A practical field guide for finding the manual work worth automating - before you buy another tool, hire another person, or hand a critical decision to a black box.

THE PRINCIPLE

Automation over autonomy.

Use software to execute repeatable work. Keep people responsible for judgment, approval, accountability, and exceptions.

Use this guide to:

- Calculate the annual capacity tied up in one recurring process.
- Separate a real automation opportunity from an unstable process or ownership problem.
- Identify the data, rules, exceptions, and human controls required before implementation.
- Choose the next responsible investment: self-service improvement, a paid decision, a Blueprint, or a build.

10+ years building systems | 5 years applying AI to real work | \$500K+ in ecosystem grants awarded to projects built or helped build

1 / START WITH THE WORK

Do not start with AI. Start with the expensive repetition.

A useful automation project begins with a recurring business outcome, not a technology wish list. The visible complaint may be missed leads, slow reports, overwhelmed staff, rework, or inconsistent follow-up. The underlying issue is usually a trigger, ownership, data, handoff, exception, or system-integration problem.

- 1

Buying a tool before mapping the process
The software may accelerate the wrong workflow, duplicate existing capability, or create another disconnected place where work can disappear.
- 2

Automating an unstable process
If the rule changes by person, customer, or day, first define the rule and the exceptions. Unclear work becomes unreliable software.
- 3

Treating an ownership problem as a software problem
Automation cannot make an unaccountable process accountable. Name the person who owns the outcome before building the trigger.
- 4

Removing humans from high-consequence judgment
Use automation to prepare evidence and execute approved actions. Keep people responsible when the decision affects money, rights, safety, reputation, or legal exposure.
- 5

Measuring activity instead of business impact
A workflow running 10,000 times is not success. Measure response time, throughput, error rate, conversion, capacity, cost, reliability, and recovered revenue.

Good starting sentence	Every week, [people or role] spend [hours] moving [information or work] from [trigger] to [outcome], and failures create [delay, error, cost, lost revenue, or risk].
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2 / RUN THE AUTOMATION SWOT

Evaluate the opportunity from four directions.

The SWOT is not a generic strategy exercise. It forces the proposed automation to confront process readiness, economic upside, implementation risk, and the realities that can cause a technically successful project to fail in production.

STRENGTHS	WEAKNESSES
- Process is documented or consistently performed. - Trigger and desired outcome are clear. - Data is structured and accessible. - Decision authority is involved. - Volume is high enough for improvements to compound. - A measurable baseline exists.	- Rules live only in one person's head. - Work varies without defined reasons. - Data is duplicated, missing, or unstructured. - Many tools and handoffs are involved. - No one owns the final result. - Exceptions are more common than the standard path.
OPPORTUNITIES	THREATS
- Recover capacity for higher-value work. - Respond faster or increase throughput. - Reduce preventable errors and rework. - Create reliable evidence and reporting. - Improve lead conversion or customer experience. - Scale without matching headcount growth.	- Vendor API, permission, or pricing changes. - Sensitive or regulated data exposure. - Bad inputs silently produce bad actions. - Staff work around the system. - No monitoring, retries, or exception owner. - Automation hides rather than fixes accountability.

Your one-process SWOT

Strengths:

Weaknesses:

Opportunities:

Threats:

3 / CALCULATE THE ECONOMICS

Turn frustration into an investment decision.

Time recovered is not automatically cash saved. It may become reduced cost, additional capacity, faster response, more throughput, fewer mistakes, better evidence, or more revenue. Name the intended business result before using the number to justify a build.

ANNUAL HOURS	RECOVERABLE CAPACITY	DIRECTIONAL VALUE
Weekly staff hours x 52	Annual hours x 25% to 50%	Recovered hours x loaded hourly cost

Worked example

A five-person team spends a combined 12 hours each week copying lead details, checking qualification, assigning ownership, and following up.

Annual hours	12 x 52	624 hours
25% capacity recovery	624 x 0.25	156 hours
50% capacity recovery	624 x 0.50	312 hours
At \$60 loaded cost	156 to 312 x \$60	\$9,360 to \$18,720

Your numbers

Combined staff hours per week:

Annual hours (weekly hours x 52):

Recoverable capacity at 25% and 50%:

Loaded hourly cost or alternative value measure:

The business result this capacity should create:

Directional scenarios are useful for deciding what to investigate. They are not guaranteed savings or revenue.

4 / SCORE READINESS

A valuable problem can still be the wrong first project.

Score each dimension from 0 to its maximum. A high score means the opportunity has both meaningful impact and a practical path to responsible implementation.

DIMENSION	MAX	WHAT GOOD LOOKS LIKE	YOUR SCORE
Impact	25	Substantial time, cost, delay, errors, lost conversion, or risk.	
Frequency	20	The process happens daily or weekly and follows repeatable rules.	
Budget	15	A realistic investment is available when the return and risk are clear.	
Authority	15	The owner or executive sponsor can approve process and system changes.	
Urgency	10	There is a real event, deadline, cost, or growth constraint within 90 days.	
Maturity	10	The normal path, ownership, and important exceptions can be explained.	
Data readiness	5	Required information is accessible, reliable, and lawful to use.	
TOTAL	100		

75-100	Implementation-quality: the opportunity is meaningful, funded, sponsored, and ready for a concrete plan.
55-74	Strategy-ready: the economics may work, but one or more decisions need a focused paid working session.
35-54	Promising but not ready: document the process, improve data, name ownership, or establish budget first.
0-34	Self-service: do not fund custom automation yet. Stabilize the work and measure the baseline.

5 / MAP THE TARGET SYSTEM

Automation needs triggers, rules, evidence, exceptions, and an owner.

A workflow diagram is not complete when it shows only the happy path. The target system must describe what starts the work, what information is trusted, what software may do, where a person decides, what happens when something fails, and how success is measured.

1	Trigger What event should begin the workflow?	
2	Inputs Which data, documents, messages, and systems are required?	
3	Deterministic rules What can software decide using explicit, testable logic?	
4	AI-assisted work Where does interpretation help, and how is the output constrained and reviewed?	
5	Human control Who approves, overrides, or owns high-consequence decisions?	
6	Exceptions What fails, times out, conflicts, or needs escalation?	
7	Evidence What logs, records, and before/after state prove what happened?	
8	Outcome Which business metric determines success?	

Human-control test

- Could this action move money, deny access, create legal exposure, affect safety, or materially change a customer's rights?
- Would a reasonable person need to understand why the action occurred?
- Can a bad input, hallucination, stale record, or vendor outage create significant harm?
- Is there a named person responsible for reviewing exceptions and system performance?

When the answer is yes, preserve explicit human approval or a tested, reversible, auditable control.

6 / CHOOSE THE NEXT RESPONSIBLE STEP

Do not buy implementation until the decision is clear.

The right next step depends on impact, readiness, authority, budget, and urgency. A smaller decision can save a much larger failed build.

CONDITION	NEXT STEP	EXPECTED OUTPUT
Low score or unstable process	Self-service improvement	Document the process, baseline the work, clean data, and name ownership.
Meaningful problem but unresolved decision	Paid Decision Session	Automate, do not automate, or not yet - with a written decision memo.
Funded opportunity requiring architecture	Automation Blueprint	Current state, target state, controls, architecture, economics, acceptance, and 30/60/90-day plan.
Approved scope with measurable acceptance	Implementation Sprint	One production workflow delivered with retries, monitoring, evidence, documentation, and handoff.
Production system with ongoing value	Automation Care	Monitoring, failure response, vendor-change remediation, reporting, and controlled improvements.

Get your personalized score

Run the free Automation SWOT on the Copper Seventh website. You will receive a private report with your score, annual capacity estimate, strengths, weaknesses, opportunities, threats, implementation risk, and the appropriate next step.

RUN THE FREE AUTOMATION SWOT

Important: This guide provides directional business-planning methods, not legal, tax, financial, security, compliance, or guaranteed-return advice. Do not submit passwords, keys, classified information, protected customer records, or regulated datasets through a public assessment.

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