



Automation Readiness questionnaire

What does your team do by hand every week?

List up to 5 tasks your team does by hand, score each one out of 100, and see which are ready to automate.

How to use it

1. **Step 1: list your tasks.** Write down up to 5 tasks and work out how much time each one takes (page 2).
2. **Step 2: score each task.** Answer six questions per task and write the points in the grid (page 3).
3. **Step 3: add up and read your band.** Total each task out of 100, rank them, and read what to do next (page 4).

Takes about 15 minutes with a pen. Do it with the people who do the work.

How the score works

Group	What it measures	Points
Time	Hours a week, across everyone who does it (questions 1 and 2)	40
Repeatability	Same steps, digital information, connected tools (questions 3 to 5)	35
Pain	Mistakes, people who know it, urgency (questions 6 to 8)	25
Total		100

Tidy up first 0 to 39

Quick wins 40 to 69

Big win 70 to 100

This PDF collects nothing: it's yours to keep.



Prefer to do it online?

Scan the code or type the address. The online version adds up the scores for you and can email you the results.

<https://erzo.co.za/resources/automation/questionnaire/automation-readiness>

Step 1: your tasks and Time

For each task, answer two questions. **1.** About how many hours a week does this task take one person? (A rough guess is fine. 30 minutes is 0.5.) **2.** How many people do this task?

Multiply them to get **person-hours a week**, then look up the Time points in the table on the right.

Your tasks

Task	What the task is	Hours a week (one person)	People	Person-hours (hours × people)	Time points (out of 40)
1					
2					
3					
4					
5					

Time points

Person-hours a week	Points
under 1	4
1 to under 2	10
2 to under 4	16
4 to under 8	24
8 to under 15	32
15 or more	40

Example: copying web enquiries into a spreadsheet takes one person 1.5 hours a week, and 3 people do it. $1.5 \times 3 = 4.5$ person-hours, which is 24 Time points.

Step 2: Repeatability and Pain

Answer questions 3 to 8 for each task. Write the points for each answer in the grid at the bottom.

Repeatability up to 35 points

3. Are the steps the same each time?

- ☐ Yes, always or almost always
- ☐ Mostly, with a few exceptions
- ☐ It varies quite a lot
- ☐ It's different every time

15

10

4

0

4. Does the information start out digital?

For example email, a web form, a spreadsheet or a system, rather than paper, phone calls or memory.

- ☐ Yes, all of it
- ☐ Mostly
- ☐ About half
- ☐ Mostly paper, phone calls or in someone's head

10

7

4

0

5. Do the tools involved connect to each other?

Can data move between them, or does a person copy it across?

- ☐ Yes, or they can export and import easily
- ☐ Some of them do
- ☐ I'm not sure
- ☐ No, someone copies between them

10

6

4

0

Pain up to 25 points

6. How often does this task go wrong?

Typos, missed steps, wrong amounts, things forgotten.

- ☐ Often, and mistakes are costly
- ☐ Sometimes
- ☐ Rarely
- ☐ Never

10

6

2

0

7. How many people know how to do it?

- ☐ Only one person
- ☐ Two people
- ☐ Several people
- ☐ Anyone could: it's written down

8

5

2

0

8. How urgent is it?

- ☐ It has to happen the same day, and delays cost us
- ☐ Within a few days is fine
- ☐ It can wait

7

4

0

Score grid: write the points for each answer

Question	Task 1	Task 2	Task 3	Task 4	Task 5
Q3 (up to 15)					
Q4 (up to 10)					
Q5 (up to 10)					
Repeatability /35					
Q6 (up to 10)					
Q7 (up to 8)					
Q8 (up to 7)					
Pain /25					

Step 3: results and next steps

Totals: Time + Repeatability + Pain. Rank 1 is the highest total (on a tie, the higher Time score, then the higher Pain score).

Task	Time /40	Repeatability /35	Pain /25	Total /100	Band	Rank
1						
2						
3						
4						
5						

What your band means

Tidy up first 0 to 39

This task isn't a strong candidate to automate yet. That's useful to know. The quickest gains usually come from agreeing one way of doing it, writing the steps down, and getting the information into one digital place.

If you'd like help turning it into a plan, an Ideas session (<https://erzo.co.za/ideas>) is one hour with me, R650, credited if you go ahead with a package within 60 days. Book an Ideas session (<https://erzo.co.za/contact?enquiry=ideas#write>)

Quick wins 40 to 69

This is a good, contained candidate: frequent enough to matter, and steady enough to automate without a big project. Start with this one, measure the time it saves, then build on it.

See how a single workflow works on the Automation page (<https://erzo.co.za/automation>). Fixed-price workflows start from R3,950.

Big win 70 to 100

This task costs real time and is ready to automate. Because it touches more steps, people or systems, it's worth planning properly before building: what triggers it, what the exceptions are, and how you'll measure the result.

Read how I plan and build automation on the Automation page (<https://erzo.co.za/automation>), or tell me about the task (<https://erzo.co.za/contact?enquiry=automation#write>).

Readiness note

If a task scores under 15 out of 35 for Repeatability, whatever its band: High on time or pain, but low on repeatability. Tidying up the steps and the data first will make this much easier to automate.



Check your sums online

Enter the same tasks online to have the scores worked out for you.

<https://erzo.co.za/resources/automation/questionnaire/automation-readiness>