Automation readiness checklist

A printable readiness check for one routine you may automate. Keep the same routine in view on every page. Tick a box only when it is true for this routine; if a safeguard is unclear or missing, pause and keep doing the task manually until it is resolved.

Set the scope

Name one repeatable routine, not a whole business process. Use the same name on the next two pages.

Routine and trigger	Expected result and human checkpoint

1. Privacy and data

- [ ] I have listed the data this routine touches, including personal or sensitive details, customer records and credentials.
- [ ] The first test uses synthetic, redacted or minimum-necessary data wherever possible.
- [ ] I know what the connected service receives, where it stores or transfers data, who can access it and how long it is retained.
- [ ] I have checked the service terms, privacy settings and relevant duties before sharing this data.
- [ ] Secrets and passwords stay out of prompts, logs, notes and shared documents.

Permissions and a safe test

Use this page for the same routine named on page 1.

Routine name	Your notes

2. Permissions and control

- [ ] I own or have authority to use the accounts, data and workflow involved; I have sought any needed consent.
- [ ] The connection has only the access this routine needs. A broader owner or administrator permission is not being used by default.
- [ ] I know how to revoke the connection and remove its access if the test must stop.
- [ ] During testing, sending, publishing, payments, deletions and changes to real records are disabled or need my explicit approval.
- [ ] I have recorded which service and access this test uses without writing credentials on this sheet.

3. Test before expanding

- [ ] I wrote down pass and fail criteria before running the test, including what a correct result looks like.
- [ ] I am using a test environment or a safe copy, with real external actions switched off.
- [ ] I will test an ordinary case and awkward cases such as missing, unusual or duplicate information.
- [ ] I will compare each result with the manual method and check for unintended messages, edits or other side effects.
- [ ] A person will review each run before the routine moves to its next step; I will record the date and outcome.

Test date	Result against pass criteria	Reviewed by

Fallback and ongoing review

Use this page for the same routine named on page 1.

Routine name	Your notes

4. Fallback and recovery

- [ ] I can pause or switch off the automation quickly and know where that control is.
- [ ] The manual steps and the person responsible for finishing the routine are written down.
- [ ] I know what to do after a partial run, delay, error or retry so the task is not accidentally repeated.
- [ ] I know how to correct or restore affected work without causing a second unwanted action.
- [ ] I have tested the fallback and can complete this routine manually if the automation is unavailable.

5. Review while it is in use

- [ ] A named person will review outputs, failures and unusual results on a stated schedule.
- [ ] I have set a next review date and will review sooner if the workflow, data or provider changes.
- [ ] I have named the conditions that mean stop, investigate and return to the manual process.
- [ ] I will recheck permissions, privacy settings and the fallback after a meaningful change.

Reviewer and next review date	Stop condition or change to check

Decision for this routine

[ ] Keep it manual or pause [ ] Run a supervised test only
Proceed to a supervised test only when privacy and permissions are understood, pass criteria are set, a person will review the results, and the fallback works. This checklist is a working aid, not a guarantee that a workflow is safe or suitable.