The AI Automation Checklist

25 steps to automate your business the right way: find, fix, build, launch.
Tick each box as you go. Start with ONE process.

1. Find the right processes

- [ ] List every task your team repeats weekly, with who does it and roughly how long it takes.
- [ ] Circle tasks that follow clear rules: copy data, send reminders, route requests, create documents.
- [ ] Rank them by hours per week multiplied by the cost of the person doing them.
- [ ] Pick ONE process to automate first: high volume, clear rules, low risk if it goes wrong.
- [ ] Write the current process down step by step before changing anything.

2. Fix before you automate

- [ ] Remove steps that exist only because 'we've always done it'.
- [ ] Agree one source of truth for customer data (usually your CRM).
- [ ] Standardise forms and templates so inputs arrive in the same shape.
- [ ] Decide who owns the process and who gets alerted when something fails.
- [ ] Define what success looks like: faster replies, fewer errors, hours saved.

3. Choose the right tools

- [ ] Check which of your tools already have integrations or an API.
- [ ] Simple, low-volume flows: Zapier or Make are usually enough.
- [ ] High volume, complex logic or sensitive data: consider n8n, often self-hosted.
- [ ] Use AI steps (OpenAI, Claude) for reading, classifying, summarising and drafting.
- [ ] Keep accounts and credentials in YOUR name, never only in a contractor's.

4. Build safely

- [ ] Test with real (or realistic) data before switching anything on.
- [ ] Add a human review step wherever an AI decision affects a customer or money.
- [ ] Log every run so you can see what happened and why.
- [ ] Set up alerts for failures instead of finding out from customers.
- [ ] Handle personal data carefully: collect only what you need, limit access, check GDPR/privacy rules.

5. Launch and improve

- [ ] Roll out to a small part of the work first, then expand.
- [ ] Measure the success metric from step 2 for two to four weeks.
- [ ] Write a one-page guide and record a short video walkthrough for the team.
- [ ] Review monthly: what broke, what's slow, what should be automated next.
- [ ] Move on to the next process on your ranked list.

Want this done for you?

I build AI agents and automations for businesses in the USA, UK and Europe.

Book a free call and get a practical plan for your first automation: mahirmunaj.com