

FREE RESOURCE | MODUVO

Automation Readiness Checklist

Identify where your team is losing hours, where your data is scattered, and which processes are ready to automate today.

15

checklist items

3

audit sections

800+

hours recoverable

SECTION 1

Data and Systems Audit

Before you can automate anything you need to know where your data lives and how your systems talk to each other. Work through each item and tick it off when you can answer yes with confidence.

1

☐**Your core data has a single source of truth**

One authoritative record for customers, orders, or projects — not split across spreadsheets and inboxes.

2

☐**Every tool you use has an accessible API or native integration**

Check that your CRM, ERP, billing tool, and communication platforms expose the endpoints you need.

3

☐**Data entry is handled by fewer than three people**

Manual input spread across many people creates inconsistency and is the first bottleneck to eliminate.

4

☐**Your team can export clean, structured data on demand**

CSV, JSON, or database queries without needing developer help every time.

5

☐**You have documented which systems own which data fields**

A simple map showing which tool is authoritative for each key field reduces sync conflicts immediately.

SECTION 2

Team Time Audit

Map where your team's hours actually go each week. These five questions surface the repetitive manual work that costs the most and is easiest to reclaim through automation.

1

☐

You know which three tasks your team spends the most time on

Name them. If you cannot without asking around first, that is your starting point.

2

☐

At least one of those tasks is purely data movement or copy-paste work

Transferring information between systems is automatable in almost every case.

3

☐

Your team sends more than ten recurring templated messages per week

Routine follow-ups, status updates, and confirmations are prime automation candidates.

4

☐

You track team hours against specific processes, not just projects

Process-level time tracking lets you calculate ROI on each automation investment accurately.

5

☐

You have identified at least one approval or handoff step that causes delays

Bottlenecks at human handoff points are resolved by routing logic, not by hiring more people.

SECTION 3

Process Maturity

Automation amplifies what already exists. Mature, documented processes automate cleanly. Ad-hoc processes create fragile workflows. Use these five items to assess your baseline.

1

☐

Your core processes are documented with clear steps and owners

Written SOPs, even simple ones, are the foundation every automated workflow is built on.

2

☐

Edge cases and exceptions are handled consistently, not case by case

Consistent exception handling means your automation can cover them without human review each time.

3

☐

Your team follows the same process regardless of who is doing the work

Process consistency is the clearest signal that a workflow is ready to hand off to automation.

4

☐

You have measured the error rate or rework rate on your key processes

Knowing your baseline lets you prove the impact of automation in measurable terms.

5

☐

Leadership has agreed on which processes are highest priority to fix

READY TO RECLAIM YOUR TIME?

Turn your checklist score into a concrete action plan.

Book a free 45-minute Operations Audit with Moduvo. We will map your top three automation opportunities, estimate the hours you can recover, and give you a prioritised roadmap to act on immediately.

Book Your Free Audit

moduvoai.com/contact

- ✓ No sales pitch. Pure diagnosis.
- ✓ Walk away with a prioritised automation roadmap.
- ✓ Completely free for qualifying companies.