



The Intelligent Organization

Capability Guide: Technology Automation

Manual Work Should Not Be the Operating Model.

Table of Contents

1. Executive Brief	5. Outputs, Evidence, and Measures
2. The Problem This Capability Solves	6. Maturity: 0 to 5
3. What this Capability Is	7. How to Build and Mature the Capability
4. How the Capability Works	8. TSLA Support and First Moves
Appendix A. Source Note	

How to use this guide

Read Sections 1 through 3 for the executive view. Use Sections 4 through 7 to build and mature the capability. Use Section 8 to decide what to do next Monday morning.

01 Executive Brief

Technology Automation is the organization's ability to redesign work and use the simplest reliable technology to reduce manual work, improve consistency, reduce errors, and support better ways of working.

Automation is the fourth Technology capability. Architecture shapes. Platforms enable. Integration connects. Automation improves. Resilience protects. Automation uses the technology environment to make work faster, safer, more consistent, and less dependent on manual effort.

Capability ID	T4 - Automation
Domain	Technology
Plain-English test	Can the organization safely use approved technology to remove unnecessary manual work, improve consistency, reduce errors, and support work redesign?
Five behaviors	Spot. Standardize. Automate. Monitor. Improve.
Three outputs	Automation Opportunity Register. Automation Standards and Guardrails. Automation Runbook and Health Review.
Accountable owner	Chief Information Officer, technology executive, automation platform owner, or assigned technology leader, working with business process owners and the Factory domain.
First move	Identify the top ten recurring manual tasks, rekeying steps, spreadsheet workarounds, approval chases, status updates, and handoffs that consume time or create errors.

Core idea

Technology Automation is the organization's ability to redesign work and use the simplest reliable technology to reduce manual work, improve consistency, reduce errors, and make work easier to run, measure, and improve. Automation should remove unnecessary effort without creating hidden risk, fragile workflows, or unmanaged complexity.

2026.08 ALIGNMENT | Automation in the refreshed TIO system**Primary outcome contribution:** Automation

- Automation includes simplification, rules, workflow, integration, traditional software, RPA, analytics, AI, agents, and physical automation.
- Use the simplest reliable method and reduce unnecessary human intervention while preserving necessary human contribution.
- Consequential state changes remain subject to deterministic validation, authority, audit, and recovery.

Evidence at managed maturity: Automation is defined, owned, applied consistently, measured in operation, reviewed through evidence, and improved without weakening trust, accountability, or Enterprise Autonomy.

First refresh move: Choose one manual step, simplify the work, and test whether a rule, workflow, integration, RPA, AI, or agent is the simplest reliable method.

02 The Problem This Capability Solves

Most organizations run on more manual work than leaders realize. People copy data between systems. They chase approvals. They update spreadsheets. They create reports by hand. They reconcile numbers. They send status emails. They repeat the same steps because the system does not do the work for them.

AI and automation make this problem more visible. They also make it more urgent. If manual work is not understood, standardized, and improved, the organization can automate confusion instead of improving work.

The purpose of Technology Automation is not to replace people. The purpose is to remove unnecessary manual work so people can spend more time on judgment, service, improvement, and value.

When Automation is weak

- People spend too much time on copy-paste work, manual status updates, rekeying, report preparation, and repeated handoffs.
- Teams build local scripts, macros, bots, or AI workarounds without clear ownership or controls.
- Manual work hides process problems, data quality issues, unclear approvals, and weak integration.
- Automation opportunities are chosen by enthusiasm instead of value, risk, readiness, and repeatability.
- Automations break when systems, data fields, access rules, or people change.
- The organization cannot tell which automations are running, who owns them, what value they create, or what risk they carry.
- Leaders confuse a demo with an operating capability.

03 What this Capability Is

Automation is the practical ability to use technology to perform repeatable work with less human effort, fewer errors, better consistency, and clearer evidence. It can include workflow automation, robotic process automation, low-code automation, system-triggered actions, integration-based automation, AI-assisted tasks, and AI-enabled workflows.

This capability is not a license to automate everything. Some work should be simplified first. Some work should be redesigned. Some work should remain human-led. Some work is too risky or too unstable to automate yet.

What Automation owns

- The approved technical approaches, platforms, and standards for automation.
- Technical patterns for safe, supportable, reusable automation.
- Automation guardrails for access, credentials, logging, monitoring, exception handling, and change control.
- Automation runbooks, ownership, support paths, and health reviews.
- Technical input into which automation opportunities are feasible, supportable, secure, and scalable.
- The connection between automation tools and Architecture, Platforms, Integration, Resilience, Data, Governance, Risk, Factory, and People needs.

What Automation does not own

- Enterprise strategy. Strategy sits in Leadership.
- Final approval to automate material work. Governance sets decision rights and approval paths.
- Risk appetite and risk assessment. Risk defines exposure, controls, and trust requirements.
- Data ownership, quality, access, flow, and insight. Those sit in Data.
- Business process redesign and value proof. Factory turns priority opportunities into measured value.
- Workforce adoption, role changes, and communication. People owns adoption and workforce change.
- Every technical integration. Integration provides the technical connections that automations often need.

Five core behaviors

Behavior	What it means in practice
Spot	Identify recurring manual work, errors, handoffs, delays, and workarounds that may be ready for automation.
Standardize	Clarify the work before automating it, including steps, rules, owners, data, exceptions, controls, and success measures.
Automate	Use approved tools and patterns to automate the right work safely and supportably.
Monitor	Track whether automations are working, failing, creating exceptions, producing value, or creating new risk.
Improve	Use evidence to enhance, scale, retire, or redesign automations as work, systems, data, and risk change.

04 How the Capability Works

Technology Automation should start with work, not tools. The first question is not, "Which bot or AI tool can do this?" The first question is, "What manual work should no longer be manual?"

Simple operating model

Step	Plain-English question
1. Find manual work	Where are people repeating steps, moving information, reconciling data, chasing approvals, or preparing outputs by hand?
2. Check readiness	Is the work stable, understood, valuable, repeatable, and supported by data, access, and systems that can be trusted?
3. Simplify first	Can the work be removed, simplified, standardized, or redesigned before technology is applied?
4. Route the opportunity	Does this need simple team automation, platform configuration, integration, AI assistance, or a Factory-managed AI Use Case?
5. Build safely	Are the right tool, owner, access, controls, testing, monitoring, and exception handling in place?
6. Operate and monitor	Is the automation running reliably, creating value, and producing visible issues when something breaks?
7. Improve or retire	Should the automation be scaled, changed, redesigned, or retired based on evidence?

Automation rule

Do not automate bad work just because technology can. Simplify the work first. Then automate the parts that are stable, valuable, repeatable, and safe.

Boundary with Factory

Technology Automation provides the approved technical means. Factory turns selected opportunities, AI Use Cases, and work redesign opportunities into measured value. **In practice, Automation and Factory should work closely together.**

A small automation may stay within Technology and the business team. A material automation that changes work, risk, roles, customer experience, or value should move through the Factory pipeline and Evidence Gates.

05 Outputs, Evidence, and Measures

Automation should produce a small number of useful outputs. The goal is to make automation opportunities visible, approved patterns clear, and live automations supportable.

Output	Purpose	What it contains	Quality standard
Automation Opportunity Register	Makes manual work and automation candidates visible.	Opportunity, business owner, process, pain point, volume, frequency, value case, data needs, systems, risk, readiness, priority, and route.	Clear enough to separate good automation candidates from noise, demos, and low-value ideas.
Automation Standards and Guardrails	Defines how automation should be built safely and consistently.	Approved tools, design standards, access rules, credentials, logging, testing, monitoring, exception handling, change control, and support ownership.	Plain enough for teams to follow and strong enough to prevent fragile or unsafe automations.
Automation Runbook and Health Review	Keeps live automations visible, owned, monitored, and improvable.	Owner, purpose, schedule, dependencies, data used, failure modes, alerts, support path, known issues, value measures, and review rhythm.	Useful enough that an automation can be supported even when the original builder is unavailable.

Evidence that the capability exists

- Recurring manual work is visible and prioritized.
- Automation opportunities are assessed for value, readiness, risk, and supportability.
- Approved automation tools, patterns, guardrails, and ownership rules exist.
- Live automations have named owners, runbooks, monitoring, and support paths.
- Automation performance, exceptions, failures, changes, and value are reviewed regularly.
- Material automations connect to Governance, Risk, Data, Factory, People, and Resilience where needed.

Useful measures

Measure	Why it matters
Hours of manual work reduced or avoided	Shows whether automation is reducing unnecessary effort.
Error reduction, cycle time reduction, and rework reduction	Shows whether automation is improving work quality and speed.
Percentage of live automations with named owner and runbook	Shows whether automations are supportable.
Automation failure, exception, and incident trends	Shows whether automations are reliable and safe.
Percentage of automation candidates assessed for value, risk, readiness, and supportability	Shows whether selection is disciplined.
Number of fragile, duplicate, or unsupported automations retired or redesigned	Shows whether the organization is reducing hidden complexity.

06

Maturity: 0 to 5

Level	What it looks like	Evidence	Next move
0 Absent	Manual work is accepted as normal. Automation is not visible or not meaningfully used.	No opportunity register, standards, owner, platform path, runbook, or health review.	Identify recurring manual work and obvious workarounds.
1 Initial	Some local automations exist, but they depend on individuals and are not consistently owned or supported.	Macros, scripts, bots, AI shortcuts, or workflow tricks exist without common standards or review.	Create a simple automation inventory and name owners for the most important automations.
2 Repeatable	Basic automation opportunities, standards, owners, and support paths exist for common use cases.	Opportunity register, approved tools, simple guardrails, owners, runbooks, and basic monitoring are used more than once.	Connect automation selection to value, risk, readiness, Data, Integration, Governance, and Factory.
3 Defined	Automation is documented, owned, communicated, and used consistently for priority work.	Defined automation standards, intake, assessment, runbooks, monitoring, exception paths, and review rhythm.	Measure value, reliability, failures, exceptions, adoption, and support cost.
4 Managed	Automation is measured, governed, improved, and connected to enterprise priorities.	Review pack showing value, cycle time, error reduction, failures, incidents, backlog, costs, and improvement actions.	Scale proven patterns and retire fragile or low-value automations.
5 Optimized	Automation continuously improves work as strategy, data, systems, AI capability, risk, and workforce needs change.	Automation is trusted, supportable, value-connected, and part of the organization's normal improvement system.	Keep using evidence to redesign work, not just automate tasks.

07

How to Build and Mature the Capability

Start with visible manual work. Most organizations do not need an automation center on day one. They need a practical view of where people are doing repetitive work, where errors happen, where approvals stall, where data is rekeyed, and where people have already built informal fixes.

Minimum viable Automation capability

- A simple list of recurring manual work and automation candidates.
- A named owner for automation standards and approved tools.
- A basic assessment of value, risk, readiness, repeatability, and supportability.
- Clear guardrails for access, credentials, testing, monitoring, exception handling, and change control.
- Named owners and runbooks for live automations.
- A monthly or quarterly review of value, failures, exceptions, improvement needs, and retirement candidates.
- Clear routing for when automation should move into the Factory pipeline and Evidence Gates.

Timeframe	Practical actions
First 30 days	Identify the top manual work pain points. Create a simple automation inventory. Name an automation owner. Confirm which tools and platforms are approved for automation.
First 90 days	Create the opportunity register, standards, guardrails, owner model, and runbook template. Assess the first set of candidates for value, readiness, risk, and supportability.
First 12 months	Build and monitor priority automations. Connect material automations to the Factory pipeline. Measure value and reliability. Retire fragile workarounds. Improve standards based on evidence.

What not to build too early

- A large automation factory before the organization understands its manual work.
- Automations that bypass data, access, privacy, security, or risk rules.
- Bots or scripts that only one person understands.
- AI automations that make decisions without clear human review where judgment or trust matters.
- A tool-led automation program that measures activity instead of value.
- Automation of broken work that should have been removed or redesigned first.

08 TSLA Support and First Moves

The organization must own the work it chooses to automate. TSLA can help leaders find the right opportunities, keep automation practical, and connect automation to TIO value, trust, and work redesign.

Where TSLA can help

Support area	Practical result
Manual Work Discovery	A practical view of recurring manual tasks, workarounds, rekeying, approval delays, reporting effort, and automation candidates.
Automation Opportunity Register	A prioritized list of automation opportunities assessed for value, readiness, risk, and supportability.
Automation Standards and Guardrails	Plain-English rules for safe, supportable, approved automation.
Factory and Evidence Gate Integration	A clear path for material automations to move through use case selection, proof, delivery, measurement, and scaling.
Automation Health Review	A review pack showing live automations, value, reliability, exceptions, failures, support needs, and improvement actions.
Thought-Partnership	Ongoing executive support as automation changes work, roles, controls, data, platforms, and value expectations.

What to do Monday morning

- Ask teams where they are still copying, pasting, rekeying, reconciling, chasing, checking, and reporting by hand.
- Create a simple list of the top ten manual work pain points.
- Identify any existing scripts, macros, bots, low-code workflows, AI shortcuts, or unofficial automations already in use.
- Name an owner for automation standards and approved tools.
- Choose one low-risk, high-friction process to simplify before automating.
- Create a basic runbook for any automation that already matters.
- Decide which automation candidates should move into the Factory pipeline and Evidence Gates.

A**Source Note**

This guide is part of the TIO Library. It is aligned to the TIO Framework, the TIO Technology Capability Domain Master, the TIO Capability Model and Maturity Assessment Tool, and the approved 8-section Capability Guide structure used across the TIO Library. It translates the Technology Automation capability into practical guidance for leaders and practitioners.

It is written as a practical executive guide. It is not a technical data-management standard, legal opinion, privacy assessment, cybersecurity review, or professional assurance report. Organizations should apply their own policies, obligations, accountabilities, and professional review where required.