Four questions before you automate anything

Automating a broken process usually allows the broken process to fail faster. Before anyone writes a line of code, signs a contract or builds an AI agent, walk the process end to end with the people who actually do the work. Count the steps, the handoffs and the systems. Then answer four questions, in this order.

1. What is the outcome?

Write one sentence that describes success for the person at the end of the process. Example: "A new hire is productive in the first month."

2. Which steps can go?

For every step, ask: if we started from scratch today, would we keep this? Remove what you would not keep.

3. Who decides what?

Name one owner for the whole process. Make approvals clear, and keep human judgment where it truly matters.

4. What is the simplest reliable technology for each step that remains?

Use a simple rule when the condition is known, the data is structured and the result must be repeatable. Use a form or a workflow for handoffs. Use AI where judgment helps, and check its work.

Before you sign off, ask one last question: will the person at the end of this process notice the difference?

Watch the episode: Why automating a broken process only helps it fail faster, on the TechTonic Conversations channel on YouTube.
Read the framework for free: thesummitla.com/the-intelligent-organization

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