

Before you hire an automation partner

48 questions for assessing an automation proposal. Tick a question when you have a clear answer and the supporting evidence.

Provider: _____ Project: _____ Date: _____

01 Project fit

- ☐ Which part of our process is worth automating, and which part should remain manual?
- ☐ What information do you need before proposing a solution or price?
- ☐ What would make you recommend a simpler tool or no build at all?
- ☐ Who will actually design, build and support the system?

02 Relevant proof

- ☐ Can you walk us through a comparable workflow and the decisions behind it?
- ☐ Which parts of that example were deployed, tested, prototyped or only proposed?
- ☐ What did not work at first, and how did you investigate it?
- ☐ Which outcomes are measured, and which are intended benefits?

03 Scope and acceptance

- ☐ What are the exact deliverables, dependencies and exclusions?
- ☐ Which sample inputs, edge cases and expected outputs define acceptance?
- ☐ Who signs off the result, and what happens if an acceptance check fails?
- ☐ How will changes to scope be estimated, approved and documented?

04 Architecture and integrations

- ☐ Why is this stack suitable for our workflow and the team operating it?
- ☐ What are the API limits, data formats and integration permissions involved?
- ☐ How will retries, duplicate events and partial failures be handled?
- ☐ What happens if a third-party service changes its API or becomes unavailable?

Check how the system will operate

Use the answers to compare proposals and identify the details that need to be agreed before work begins.

Provider: _____ Review date: _____

05 Data and access

- ☐ What data will the system read, store, transform or send to another provider?
- ☐ Where will the data be processed and retained, and who can access it?
- ☐ How are credentials, user roles and access boundaries managed?
- ☐ What data-processing terms, deletion procedures or transfer safeguards are needed?

06 AI and decision quality

- ☐ Which task requires AI, and which tasks use deterministic rules or code?
- ☐ How will quality be evaluated with representative examples?
- ☐ Which actions need human approval, and what happens when the model is uncertain?
- ☐ How are model changes, prompt changes, latency and usage costs assessed?

07 Testing and deployment

- ☐ Which paths are tested, including permissions, invalid inputs and failures?
- ☐ How will real data be checked without causing unintended production actions?
- ☐ What is the deployment, migration and rollback plan?
- ☐ How will you demonstrate that the live configuration matches the tested build?

08 Operating the system

- ☐ How will we see whether a run succeeded, failed or needs a person?
- ☐ Which alerts are actionable, and who receives them?
- ☐ How can a failed job be retried safely or stopped?
- ☐ What backups and recovery procedures exist, and how are they checked?

Make the relationship explicit

Use the answers to compare proposals and identify the details that need to be agreed before work begins.

Provider: _____ Review date: _____

09 Ownership and handover

- ☐ Who owns the custom code, workflows, documentation and deployment accounts?
- ☐ Which third-party licences or provider subscriptions will we need?
- ☐ What documentation and training are included in the handover?
- ☐ Could another competent provider operate the system from what we receive?

10 Pricing and recurring costs

- ☐ What is fixed price, what is variable, and what could create an additional charge?
- ☐ What are the expected hosting, model, automation and third-party service costs?
- ☐ How do those costs change as usage or data volume increases?
- ☐ What are the payment milestones and the process for approving extra work?

11 Support and guarantees

- ☐ What does the support retainer include, and what sits outside it?
- ☐ What are the coverage hours, response commitments and escalation route?
- ☐ How are defects in the delivered work distinguished from changes or new features?
- ☐ Who handles dependency changes, provider outages and recovery after an incident?

12 Review and exit

- ☐ How will we review reliability, costs and the improvement backlog?
- ☐ What happens at the end of the support term or if either party wants to stop?
- ☐ How will access, data, credentials and open issues be handed over on exit?
- ☐ Which unanswered questions need to be resolved in the written agreement?

Open questions to resolve before signing
