

AI Automation: Your First-Week Practical Checklist

A practical companion to the article “How to Automate Repetitive Tasks With AI Without Coding.”

Core rule: Start with one frequent, predictable, low-risk task. Use AI only where understanding or judgment is genuinely needed. Keep a human responsible for consequential actions, then test, monitor, log, alert, review, improve, and measure.

1. Choose Your First Task

- Pick one repetitive task you perform regularly.
- Confirm the steps are mostly repeatable.
- Confirm the output is clear and easy to review.
- Prefer low-risk work such as email classification, meeting summaries, form-to-sheet entry, file organization, reports, research collection, or draft replies.
- Avoid starting with payments, financial approvals, medical/legal decisions, hiring, security permissions, sensitive-data handling, or irreversible deletion.

2. Score the Automation Candidate

Factor	Question	Score
Frequency	How often does it happen?	1–5
Repetition	Are the steps basically identical?	1–5
Predictability	Do inputs look similar?	1–5
Clear output	Is there an obvious finished state?	1–5
Reviewability	Can you quickly spot mistakes?	1–5
Risk	Could failure affect money, privacy, consent, law, or customers?	Subtract

Guide: 18–25 = strong first candidate; 10–17 = possible, but keep human approval; below 10 = do not automate yet.

3. Document the Current Manual Process

- Write the current process step by step before opening a tool.
- Identify the trigger, data collected, decision, action, review, and logging step.
- Remove unnecessary steps before automating.
- If a simple rule can solve the task, do not add AI just because it is available.

4. Build the Workflow

Trigger → Collect → Understand → Decide → Act → Review → Log

- Choose a reliable trigger.
- Connect the required data source.
- Add an AI step only for classification, summarization, extraction, interpretation, or drafting.
- Add rules/conditions for decisions.
- Connect the final action.
- Add human review wherever the consequence matters.

- Keep a run log or history.

5. Test Before Trusting It

- Test with at least five real, varied examples.
- Include messy inputs and missing fields.
- Test duplicates and unusual cases.
- Verify the trigger.
- Check AI output.
- Verify the final action.
- Create a fallback for uncertainty or failure.

6. Apply the Human Approval Ladder

Level 1: AI suggests, human acts. Level 2: AI prepares, human approves. Level 3: AI executes low-risk actions, human monitors. Level 4: Routine workflows run automatically and exceptions go to humans. Level 5: Fully autonomous operation only after mature, well-tested performance.

For a first month, stay mainly at Level 1 or 2.

7. Protect Data and Permissions

- Use least-privilege access.
- Prefer read-only permissions where possible.
- Check whether email/document contents are sent to an AI model.
- Avoid genuinely confidential information unless the provider's data-handling policy supports the use.
- Know where credentials are stored.
- Revoke unused integrations.
- Keep logs so actions can be reconstructed.

8. Reliability Loop

Test → Monitor → Log → Alert → Review → Improve

- Monitor the workflow regularly during the first few weeks.
- Alert on failures and low-confidence cases.
- Review successful runs as well as flagged runs.
- Adjust prompts/rules based on observed failures.

9. Measure Whether It Actually Saved Time

For two weeks, record: manual time per instance, number of automation runs, time spent fixing failures, and how often output needed correction. If setup and babysitting time approaches the old manual workload, stop and simplify—the work has been relocated rather than removed.

10. First-Week Completion Checklist

- One task selected and scored
- Manual process documented
- Trigger confirmed
- AI used only where needed
- Human approval added for risky steps
- Five+ varied real tests completed
- Failure/uncertainty path added
- Permissions and data handling checked
- Logs and alerts enabled

- One-week review scheduled
- Actual time saved measured
- Evidence collected before building workflow #2

Find. Score. Simplify. Automate. Approve. Monitor. Measure.

Based on the source article's workflow model, Automation Score, first-week checklist, human-approval ladder, safety guidance, reliability loop, and time-measurement method.