

Manager's Automation Worksheet

Identify, evaluate, and plan workflow automations for your team.

Navigate what's next.

This worksheet accompanies *How Managers Can Automate the Work That Eats Their Week* on RewiredPathways.com. Use it to inventory your team's recurring tasks, evaluate which ones are genuine automation candidates, and plan your first build. Print it, share it with your team, and bring it into planning sessions.

Page 1: Automation Candidate Inventory

List every recurring task you or your team performs manually. Do not filter yet. Capture everything, then evaluate on Page 2.

TASK / PROCESS	FREQUENCY	TRIGGER	TIME PER OCCURRENCE	MONTHLY TIME COST
e.g., Weekly KPI report assembly	Weekly	Monday morning	60 min	4 hrs

Tip: Focus on tasks that happen at least weekly. Daily tasks that take 10 minutes compound to 43+ hours per year. That is a full workweek consumed by a single small manual process.

Page 2: Automation Evaluation

Transfer your top candidates from Page 1. Apply the three-question filter to determine which are genuine automation candidates.

The Three-Question Filter:

- 1. Does this happen on a predictable schedule or consistent trigger? **(Schedule)**
- 2. Does it follow the same steps every time? **(Repeatable)**
- 3. Does completing it require a genuine human decision, or just passing information? **(Judgment)**

If the answers are **Yes, Yes, No**, it is an automation candidate. Information is moving, not being decided on.

TASK	PREDICTABLE SCHEDULE?	SAME STEPS EVERY TIME?	REQUIRES HUMAN JUDGMENT?	SYSTEMS INVOLVED	AUTOMATION CANDIDATE?
e.g., Weekly KPI report	Yes	Yes	No	Sheets, Slack	YES

Tip: If a task requires judgment on only one step but the other five steps are mechanical, it may still be a partial automation candidate. Automate the mechanical steps and keep the human in the loop only where genuine judgment is needed.

Page 3: Build Plan

For each confirmed automation candidate, map the build. Start with your simplest, highest-frequency candidate.

AUTOMATION NAME	TRIGGER EVENT	AUTOMATED ACTIONS (IN ORDER)	DESTINATION / OUTPUT	SUCCESS METRIC
e.g., Monday KPI Report	Sunday 11 PM (scheduled)	Pull metrics from Sheets; format summary; deliver to Slack #ops channel	Slack message	Report arrives by 7 AM Monday with no manual assembly

Recommended Platform: For multi-step operational workflows with routing, conditions, or multiple tools, [Make.com](#) is the stronger choice. Its visual scenario builder makes complex workflows easier to build and audit. Both Make.com and Zapier offer free tiers to test before committing. Start at [rewiredpathways.com/recommend/make](#).

Start small. Pick your simplest, highest-frequency candidate from this sheet and build just that one. One working automation teaches you more about how the tools think than any tutorial, and the next one takes half the time. Use the Automation Spotter prompt in the Operator's AI Prompt Pack (available in the vault at [rewiredpathways.com/vault](#)) to evaluate any task before you build.

Know a manager who is still assembling reports by hand? Forward this worksheet to them, no signup required.



Compiled by the RewiredPathways Editorial Desk

Navigate what's next.

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