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Automation Readiness Canvas

Use this canvas to document and evaluate a process before introducing automation or AI.

Process Overview	
Process Name	
Brief Description	
Trigger	
Desired Outcome	
Frequency	
☐ Continuous ☐ Daily ☐ Weekly ☐ Monthly ☐ Ad hoc	
Approx. Volume	☐ Low ☐ Medium ☐ High
Current State	
☐ Informal ☐ Documented ☐ Standardized ☐ Measured ☐ Optimized	

Ownership and Accountability	
Process Owner	
Automation Owner	
Decision Authority	
☐ Process Owner ☐ Automation Owner ☐ Shared ☐ Other	
Escalation Path (if automation fails or confidence drops)	
Human Judgement Requirement	
☐ Always ☐ Exceptions ☐ Defined checkpoints ☐ Never (high confidence only)	

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Process Flow (High-Level) *List only the essential steps (avoid detailed swimlanes)*	
1	
2	
3	
4	
5	

Primary Inputs	Primary Outputs

Exceptions and Variability	
Known Exceptions or Variants	
Frequency of Exceptions	
☐ Rare ☐ Occasional ☐ Frequent ☐ Unpredictable	
Current Handling Method	turn off alarm before bed
Risk if exception handling is automated incorrectly:	
☐ Low ☐ Medium ☐ High	

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Data Sources and Controls	
Data Sources (check all that apply)	
☐ Core Systems ☐ Spreadsheets ☐ Documents ☐ Email ☐ Human input ☐ External sources	
Data Quality	☐ High ☐ Medium ☐ Low
Data Stability	☐ Stable ☐ Periodic changes ☐ Frequent changes
Data Sensitivity	
☐ Public ☐ Internal ☐ Confidential ☐ Regulated	
Relevant Policies/Controls	

Last Reviewed:	
Prepared By:	

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Automation Readiness Canvas

Readiness, Risk, and Decisioning

☐	Process steps are stable and repeatable.
☐	Ownership and accountability are clear.
☐	Exceptions are understood and documented.
☐	Data sources are reliable.
☐	Human override points are defined.

Readiness Score (1-5)	

Primary Risks of Automation
missing ameeting

Impact if automation fails silently:	☐ Low ☐ Medium ☐ High

Mitigation Measures
secondalarm,bed early

Audit/Traceability Required	☐ Yes ☐ No

Automation Approach Recommendation	
☐	Not ready, stabilize process first.
☐	Assistive automation (human-led)
☐	Conditional automation (rules + escalation)
☐	High-confidence automation

Rationale

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Automation Readiness Canvas

Monitoring and Learning Loop	
KPIs / Signals to Monitor	
Who Reviews Outcomes	
Re-evaluation Trigger (e.g. volume change, errors, regulation):	
Next Review Date	

Automation should reduce effort while preserving accountability.