

Checklist

PREPARING SOPS FOR AUTOMATION

This checklist guides you through the essential steps to prepare your Standard Operating Procedures (SOPs) for automation. Following these steps will help ensure your SOPs are structured appropriately for technological enhancement while maintaining operational effectiveness.

1. Initial Assessment & Planning

- ☐ **Evaluate current SOPs for automation potential**
Identify high-volume, repetitive tasks with clear rules and standardized inputs that offer the best opportunities for initial automation efforts.
- ☐ **Create process maps for existing workflows**
Document both standard operations and exception handling scenarios to ensure comprehensive coverage of all possible process paths.

- ☐ **Standardize data formats**

Define consistent formats for all data inputs and outputs to ensure compatibility with automated systems.

2. Documentation Enhancement

- ☐ **Define clear validation rules**

Specify exact validation requirements for each process step, including acceptance criteria and verification methods.

- ☐ **Document error-handling procedures**

Create detailed protocols for managing exceptions and situations requiring human intervention.

- ☐ **Establish quality control checkpoints**

Identify critical points in the process where quality checks should be implemented to maintain accuracy.

3. Technical Preparation

- ☐ **Map SOPs to potential automation tools**

Create an evaluation matrix comparing different automation solutions based on specific requirements and compatibility.

- ☐ **Assess integration requirements**

Document how automated processes will interface with existing systems and workflows.

- ☐ **Design test scenarios**

Develop comprehensive testing procedures covering standard operations, edge cases, and potential failure points.

4. Implementation Planning

- ☐ **Create pilot program framework**

Design controlled environment tests to verify and refine automated processes before full deployment.

- ☐ **Develop training materials**

Prepare documentation explaining both automated processes and underlying business logic for team members.

- ☐ **Establish performance metrics**

Define clear success criteria and KPIs to measure the effectiveness of automated processes.

5. Scalability Considerations

- ☐ **Plan for multi-location support**

Ensure automated processes can accommodate growth across different locations or departments.

- ☐ **Document technology infrastructure requirements**

Specify necessary technical resources and capabilities needed to support scaled operations.

- ☐ **Create monitoring protocols**

Develop systems for tracking performance and identifying potential issues across all automated processes.

6. Maintenance & Evolution

- ☐ **Establish review cycles**

Create schedules for regular assessment and updates of automated processes.

- ☐ **Define feedback mechanisms**

Implement systems for collecting and acting on user feedback about automated processes.

- ☐ **Create improvement protocols**

Establish procedures for continuously optimizing automated processes based on performance data and user input.