

Prepare for apps and workflow automation

Map triggers, systems, approvals, and exceptions before connecting your tools.

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Show the process from end to end

Describe what starts the task, the information it needs, the steps people take, and the output they expect. Examples include quotation preparation, updating records between systems, processing a form, or an internal approval tool. Include the awkward cases as well as the easy ones.

Bring a systems list

- The tools, account owners, available integration methods, and any test environment.
- Input and output fields, validation rules, volumes, and frequency.
- User roles and actions that need explicit approval before they happen.
- What to do with errors, duplicates, missing records, or a service outage.

Keep higher-impact actions controlled

For IT, security, payment, or other sensitive workflows, identify the technical owner and agree review, logging, permissions, and rollback requirements. Begin with a bounded workflow and a test environment where possible. Integration feasibility is confirmed before delivery commitments.

Your checklist

0/4 complete

- ☐ Map the trigger and final output.
- ☐ List systems and owners.
- ☐ Document exceptions and approvals.
- ☐ Choose a safe initial scope.

A USEFUL NEXT STEP

Bring a sample process map, even if it is only a few written steps.

Your signed proposal and agreement define the final scope, fees, responsibilities, and terms.

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