

FREE RESOURCE · DATA SECURITY STRATEGIST



Business Automation Starter Kit

Spot busywork worth automating — and scope a first win

No coding required. About 45–75 minutes.

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Secure · Connect · Optimize

Who this is for

If the same manual work eats your team’s week — sorting files, cleaning spreadsheets, copying data between tools, or remembering to send “that report” — this workbook is for you.

1. **List** tasks. 2. **Filter** what’s worth automating. 3. **Measure** time and money. 4. **Pick one** starter project. 5. **Define done**.

Section 1 — Where the time goes

One row per repeating task. Start with weekly or monthly work.

#	Task (what someone does by hand)	Who?	How often?	Minutes	Tools	Pain 1–5
1						
2						
3						
4						
5						
6						
7						
8						

Sound familiar? Check any that fit

Task type	Yes / No	Notes
Renaming, sorting, or moving files into folders		
Cleaning or combining Excel / CSV exports		

Task type	Yes / No	Notes
Copying data from one system into another	☐	
Building the same weekly status or numbers sheet	☐	
Sending the same reminder email over and over	☐	
Downloading a report from a website and saving it	☐	
Watching a folder or inbox and acting on new items	☐	
Creating invoices, packing lists, or letters from a template	☐	
Backing up a folder or exporting data on a schedule	☐	
Collecting public info into a spreadsheet	☐	

Section 2 — Is it worth automating?

Score your top 3–5 tasks. 1 = no / low · 5 = yes / high.

Task	Often? /5	Rules clear? /5	Little judgment? /5	Data easy? /5	Recover if fail? /5	Total /25

20–25 strong fit · **14–19** possible · **8–13** later · **Below 8** keep doing it by hand for now.

Stop signs (don't automate yet)

Stop sign	Applies?	Do this instead
The rules change every time ("it depends")		Write the steps down first
A person must judge each run		Automate the prep; keep human approval
Sensitive data with weak access controls		Fix who can see it, then automate
Nobody can explain the current steps		Write a short how-to, then come back
A quiet failure would be expensive		Add a test mode and clear error alerts first

Section 3 — What does this task cost you?

Pick one task and fill in the numbers.

Input	Your number
Minutes each time	
Times per week	
Weeks per year (usually 48–52)	
Rough hourly cost of the person doing it	
Extra minutes per week fixing mistakes (optional)	

Hours/year = (minutes × times/week × weeks) ÷ 60. Yearly labor = hours × hourly cost. Yearly total = labor + mistake cost.

Result	Amount
Hours per year	
Yearly labor cost (\$)	
Yearly mistake cost (optional) (\$)	
Yearly total (\$)	

Section 4 — Starter examples

A — Folders and files. Move files into dated folders by type or name. Log what moved. Don't delete by default — start with a test list.

B — Spreadsheet / CSV. Clean columns, drop empty rows, fix dates, save a new file. Keep the original.

C — Weekly report pack. Combine known files into a template. If a source is missing, stop — don't send half-finished data.

Your first project

Field	Your answer
Task name	
Closest example (A / B / C / other)	
When it should run (one click, daily, weekly...)	
Inputs (files, folders, accounts)	
Outputs (what you should see when it works)	
How you'll check one successful run	
What to do if it fails	
Who owns it after it's handed over	

Section 5 — Before anyone builds

Item	Done?	Notes
One sentence: "When this works, it will..."	☐	
Must do (in scope)	☐	

Item	Done?	Notes
Not now (out of scope)		
Sample data ready (remove real customer details if needed)		
Where it will run (whose computer or server)		
Logins / access needed		
How errors get noticed		
Short how-to for the owner (start / stop / check)		
Check-in date after go-live (for example, 2 weeks)		

Section 6 — Next steps

Do it yourself

- Finish Sections 1–3 and pick the highest-scoring task with a clear yearly cost.
- Fill in your first project box in Section 4.
- Clean up the process on paper before any coding.
- Automate the smallest useful slice first — one folder, one export, or one report.
- Add a schedule only after a manual run is trustworthy.

When to get help

- The task touches several systems
- A failure could hurt customers, payroll, or sensitive data
- You want logging, scheduling, and a clear handoff done right the first time
- You'd rather buy back staff time than learn scripting under a deadline

Want help building the first automation?

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