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Automation Payback Worksheet

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How to use this sheet (this week)

Keep a tally for two days, or ask your team to. Pick the three repeated tasks that take the most time. For each one, write the hours a month, the cost of an hour, and the cost of a tool. Choose one that pays back within three months, and set it up this month, with a one-page note. If none pays back, that is useful too: you have just saved the money. Keep the shortlist and the one-page note in Systex at loftybiz.net, so you can find them when you review the numbers.

1. Payback check — hours × hourly cost vs tool cost

A simple rule used in the video: if the tool pays for itself within three months, it goes on the shortlist. If not, it waits. Figures below are a blank worksheet, plus one illustrative example.

Task	Hours / month	Cost of an hour	Time cost / month	Tool set-up	Tool / month	3-month tool cost	Pays back in 3 months?	Shortlist?
(example) Receipt reminders	18	25	450	400	60	580	Yes	Yes

Time cost / month = hours × cost of an hour. Three-month tool cost = set-up + (3 × monthly fee). Illustrative example only (not a promise): about 18 hours a month of chasing, at about $25 an hour, against a tool costing about $400 to set up and about $60 a month. An easy yes in that example. A task that needs weeks of set-up for a few hours saved can wait.

2. The right-enough test

#	Question	Yes / No	Notes
1	Is this task done the same way every time?		
2	Is a small error easy to spot and fix?		
3	Would a mistake here be more than a small, easy fix (for example tax advice, prices, promises, anything legal or medical)?		

A task is ready to automate when the first two answers are yes, and the third is no. If the third is yes, it stays with a person, every time.

3. One-page note for each automation you turn on

Field	Write this here
What it does	
Who owns it	
How to switch it off	
Date turned on	
Date of the 90-day review	

Add one tool at a time. Only when it runs smoothly do you add the next one. After ninety days, check the numbers again and switch off what does not pay.

4. This week's kit

	Item	Notes / date
	Tally kept for two days (or the team kept one)	

	Three repeated tasks picked, with hours, hourly cost and tool cost written down	
	One task chosen that pays back within three months (or a note that none did)	
	That one task set up this month, with a one-page note	
	90-day review date in the calendar	
	Shortlist and one-page note stored so I can find them (for example in Systex)	

Three mistakes to avoid: automating a messy process (fix the steps first); turning on too many tools at once (every tool needs an owner, a login and a monthly check); forgetting the customer (if an automatic message feels cold or confusing, rewrite it until it sounds like you). For bigger AI tasks: control the input and output, train the tool with good examples, make your expert the checker, and protect your data (business account, strip names and phone numbers, check privacy settings).

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