

The Automation Decision Matrix

Which client tasks should you automate?

	Simple / Rule-Based Clear "if-this-then-that" logic	Complex / Judgment Requires human decision-making
High Volume Hours per week	 Automate Now <i>Email sorting, data entry, invoice reminders</i>	 AI-Assisted <i>Lead screening, support triage, content categorization</i>
Low Volume Minutes per week	 Maybe <i>Worth it if very simple; otherwise keep manual</i>	 Keep Manual <i>VIP onboarding, strategic decisions, sensitive negotiations</i>

How to Use This Matrix

- ☐ **Automate Now**
High ROI. Build immediately or recommend to client.
- ☐ **AI-Assisted**
Use AI to handle first pass, human reviews final output.
- ☐ **Maybe**
Only automate if extremely simple and quick to set up.
- ☐ **Keep Manual**
Too risky or infrequent. Human touch is essential.