

AUTOMATION WORKSHOP

A practical project, from start to finish



Observe

A real need



Automate

A supervised prototype



Measure

A measurable result

Design, test and turn AI automation into a useful service

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This programme is for individuals developing a service skill and professionals improving an existing process. The expected outcome is a project file, a supervised prototype and either a priced service proposal or an internal pilot report. This is a working method, not a promise of income.

The projects require a computer, a Google account and an automation tool such as Make. Accounts and software subscriptions are your responsibility. AI exercises can be completed manually before integration. No certification, CPF funding, videos or individual mentoring are included. Suggested study time is indicative: allow 20 to 30 hours for reading, exercises and the final project.

Tutorials explain operations and field mapping; exact interface labels can change. The supplied files are templates to adapt, not importable scenarios already connected to your accounts. Financial examples are fictional. The website demonstration is a local simulation, with no Google, Make or AI connection.

How to use this programme

A four-week learning plan

Week 1: complete modules 1 and 2, conduct three interviews and choose a problem. Week 2: complete modules 3 and 4 and build a collection workflow without AI. Week 3: complete modules 5 and 6, add drafts and test failures. Week 4: complete modules 7 and 8, present the project and decide how to use it.

Each module provides concepts, procedures, exercises and answers. Read the procedure, use the fictional kit data and compare your work with the answer. Do not fill a missing step with an assumption. An item waiting for review is better than an incorrect message being sent.

Business pathway: your final output is a demonstration and a commercial proposal. Professional pathway: your final output is an internal experiment with an accountable owner and before/after measures. The technical foundations are shared; adapt the final decision to your goal.

Contents

1. Find a useful, solvable problem.
2. Estimate value and costs.
3. Prepare data and workflow logic.
4. Build three guided projects.
5. Use AI with human control.
6. Test, protect and maintain.
7. Present and sell a service.
8. Deliver, measure and grow.

Appendices: templates, troubleshooting, assessment and resources.

Module 1 · Find a useful problem

Choose the right problem



Repetitive

The task recurs often



Measurable

Time spent is known



Manageable

Exceptions are planned

Lesson 1.1 · Start with the task, not the tool

A tool alone does not create value. Start with an event, an action and an outcome. For example, an enquiry arrives through a form; someone copies it into a spreadsheet and drafts an acknowledgement; the enquiry becomes trackable. A useful system reduces copying while leaving the commercial decision with a person.

Observe a user completing the task once. Record the steps, copied fields, interruptions and corrections. Separate ordinary cases from exceptions. Correction time matters as much as entry time. If decisions rely on unwritten rules, make those rules explicit before building.

Choose a reversible action first: classify an enquiry or prepare a draft. A payment, medical decision, contract change or automatic deletion is a poor first learning project. You can learn connections and controls without involving a real customer.

Exercise: describe a task as “When..., we..., so that...”. Answer: “When a quotation enquiry arrives, we record its identifier and prepare a response for review, so enquiries are not overlooked.” “Build an AI agent” is insufficient because it names no user need.

Lesson 1.2 · Conduct three interviews

Prepare five questions: how does the task begin? How often does it happen? How long does a normal case take? Which errors have occurred? Who can approve a change? Ask for a recent concrete example. The interview tests your hypothesis; it is not an immediate sales pitch.

Treat volume and time as estimates until measured. Someone may report “an hour” while three timed cases take eight minutes each. Separate observations, estimates and preferences. Ask permission before keeping an organisation’s documents or data.

Summarise the problem, consequence, frequency, current solution and owner. If nobody wants a change, a technically successful prototype may remain unused. If the problem is rare and inexpensive, investigate another process.

Exercise: an owner receives 40 monthly enquiries, spends five minutes per enquiry and dislikes the task. Is that enough to set a price? Answer: no. You have an estimated 3 hours 20 minutes per month, but still need the hourly cost, realistically recoverable time, error impact, software costs and acceptance of a new workflow.

Lesson 1.3 · Prioritise with a scorecard

Score frequency, problem cost, rule clarity and data accessibility from one to five. Assess risk separately as low, medium or high. Add the four scores; do not let a high total cancel out a high risk. Sensitive data requires specific scoping.

Fictional example: copying form enquiries scores $4 + 3 + 5 + 4 = 16$, with low risk using fictional data. Automatically issuing a binding quotation scores $3 + 4 + 2 + 3 = 12$, with high risk. Choose collection and draft preparation as the initial scope.

Keep the problem brief to one page. State what stays manual. This makes the demonstration clear: the system prepares and a person approves. Define an observable outcome, such as “a complete enquiry creates a row and a draft, without sending anything to the customer”.

Exercise and answer: compare automatically publishing to ten social platforms with internally classifying enquiries. Classification is usually a better learning project when data is available, because it involves fewer permissions, variants and external effects. This is not universal; justify your choice with the scorecard.