



A 20-MINUTE AUDIT • PUBLISHED MAY 2026 • v2.0

Automation *readiness checklist.*

A practical 20-minute audit for SMBs before investing in n8n, AI agents, or chatbot automation.

HOW TO USE THIS

Tick every item you can answer truthfully. Add up the boxes ticked at the end — the score on page 2 tells you whether to build, scope tighter, or fix data first.

01 | **Pick the right** *first workflow*

- Happens at least 20 times/month
- Has clear inputs and outputs
- Currently takes more than 2 hours/week
- Has a human owner who can approve edge cases
- Failure would be annoying, not catastrophic

02 | **Map** *the systems*

- Source system identified
- Destination system identified
- Credentials / API access available
- Webhook or export path known
- Duplicate records can be detected

03 | **Data quality** *check*

- Required fields are consistently present
- Naming and status values are standardised
- Historical examples exist for testing
- PII and security requirements are known
- Bad data can be quarantined, not silently processed



CONTINUED

Sections 4–5 + *scoring*

04 | **AI fit** *check*

- Task needs judgement, classification, drafting, or extraction
- A deterministic rule is not enough
- Human review can be kept for high-risk outputs
- Grounding docs / examples exist
- Expected output can be validated

05 | **Production** *guardrails*

- Retry policy exists
- Error notifications go to the right person
- Audit log is stored
- Rollback / manual fallback is documented
- Monthly owner review is scheduled

SCORING

18 – 25 ticked

Ready for a build. — Book a 15-min map and we will scope a 2-week ship.

12 – 17 ticked

Scope carefully. — Tighten the workflow choice. Often a Spark, not a Flow.

Under 12

Fix data first. — Clean process and data before adding automation.

Got a workflow you would like a second pair of eyes on?

Email the ticked checklist to support@nex-flow.io · or book a 15-min map at nex-flow.io

