

Automation for People Who Don't Speak Robot

API = An API is like a **messenger or translator** between two apps, helping them talk to each other.

Logic is the instructions you give your messenger to follow. 🧠

AI = Thinking - Use AI when judgment or reading is needed

Automation = Doing - Use automation when rules are clear

Together they replace "read, think, type" work.

Identifying the low-hanging fruit

Write out 5–10 tasks that are:

- Repetitive
- Rule-based
- Easy to explain

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

Then pick the one that's obvious. **Fewest Rules + Biggest Payoff = Easiest Win**

The best first automation feels so obvious you'll be mad you didn't do it sooner.

next 12.

Automation Creation Checklist

Step 1 – Document It

- ☐ One-page process. List each step. Have the doer write it.

Step 2 – Find a Developer

- ☐ Freelancer or agency — compare hours, not hype. Automation should **save money**, not cost an employee.

Step 3 – Set Your Developer up for Success

- ☐ Share your workflow or process document
- ☐ Give access to all systems the workflow touches 
- ☐ Request API documentation from each system's support team, just forward to dev
- ☐ Create a separate "bot" email for testing (e.g., bot@yourcompany.com)
- ☐ Ask your developer to confirm what's possible via API
- ☐ If something can't be done — ask *"What can?"* or try the next task on your list
- ☐ Share real examples of what you are trying to automate if you need AI to be involved with reading

Step 4 – Testing

- ☐ Expect ~2 weeks of development + 2–4 weeks of testing 
- ☐ If using AI send real examples to your "bot" email and see how it reacts
- ☐ Ask your developer to build an intermediate page between the system and your real system for quality control
- ☐ Give feedback → tweak → repeat 
- ☐ Each round teaches your system new scenarios
- ☐ Build a clear instruction document for your AI (like training a new hire)

Humans 2.0

Automation ≠ "set it and forget it."

Humans = **quality control**, not data entry.

AI learns from feedback — refine, repeat, relax.

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