



90-Day Automation Operating Plan

A reusable backlog and review plan for automation opportunities, owners, baselines, human decisions, risks, and next actions.

How to use this document

Print it or open it beside your notes. Shaded cells are yours to fill in. Work through it with the people who run the workflow today, then bring the completed version to a conversation about what to build.

This template turns a collection of automation ideas into a short operating plan with owners, baselines, human-control points, and decisions.

How to use it

1. Add one row for each workflow that is creating measurable friction.
2. Name the business owner and the person who will own the system after launch.
3. Record the baseline before choosing a tool.
4. Write down what people must continue to decide.
5. Review the backlog every 30 days and make one decision: expand, revise, stop, or investigate.

Opportunity backlog

Opportunity	Business owner	System owner	Baseline metric	Target metric	Human decision or exception	Risk	Next decision

30-day discovery checklist

- ☐ Current workflow mapped from trigger to outcome.
- ☐ Inputs, systems, handoffs, and delays recorded.
- ☐ Exceptions and sensitive decisions identified.
- ☐ Baseline metric chosen and owner assigned.
- ☐ Candidate first system ranked against impact and feasibility.

60-day design checklist

- ☐ First release has a narrow scope.
- ☐ Data and permissions are documented.
- ☐ Human review and escalation paths are explicit.
- ☐ Normal, incomplete, conflicting, and failure test cases exist.
- ☐ Acceptance criteria are agreed with the business owner.

90-day launch checklist

- ☐ Real cases tested before production use.
- ☐ Users trained on the normal and exception paths.
- ☐ Manual fallback or rollback path documented.
- ☐ Baseline and post-launch measure compared.
- ☐ Next decision recorded: expand, revise, stop, or investigate.

Review questions

- Did the system change the metric we cared about?
- Which cases still need a person?
- What surprised the team?
- What should we stop automating?
- What is the next smallest useful improvement?

The plan supports the Fractional CAO engagement. If the opportunity is not clear enough to put into this table, start with an AI Success Audit.

Need an owner for this plan?

The Fractional Chief Automation Officer engagement runs this cadence with your team.

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