Automation Discovery — Client Workbook

Prepared by the NightShift Automation Team · Confidential

How to fill this out: Type directly into this document — your answers save on this device as you go. When you are done, use **Complete Discovery** below to send them to us, or print to PDF — or skip the typing entirely: book a 20-minute call and we'll fill it out together while you talk. Screenshots welcome anywhere.

YOUR DETAILS

Name *

Email *

Business Name *

Business URL (Optional)

https://

Phone *

1 · WHAT YOU WANT HANDLED — THE STARTING WORKFLOW

The single task you most want off your team's plate. We build it end-to-end first; more workflows follow once this one is running. Examples: incoming orders/results intake, new-customer intake & record prep, renewals & billing follow-ups, status updates and follow-ups, report preparation — or name your own.

In your own words: what should be handled for you, start to finish?

How will you judge it's working? (hours back, faster turnaround, nothing missed)

2 · ACCESS — WHAT WE NEED TO BUILD ANYTHING

These answers determine our build timeline more than anything else in this document.

Remote access to a workstation (e.g., a spare computer we can reach securely):

- ○ Yes, Can Arrange
- ○ Need to Discuss
- ○ No

A dedicated login for the automation in your main system:

- ○ Possible
- ○ Shared Login Only
- ○ Unsure

Two-factor codes on any logins:

- ○ Yes
- ○ No
- ○ Some

Where do codes go (phone/email/app)?

Every system/portal this workflow touches (software names; note web vs installed):

3 · THE WORKFLOW TODAY — STEP BY STEP

One row per step, exactly as your team does it now. This table becomes the automation's script — the most valuable page here.

#	WHAT HAPPENS (OPENED, CLICKED, TYPED, CHECKED)	SYSTEM	WHO	TIME
1				
2				
3				
4				
5				
6				

What starts an item (something arrives? a queue fills? time of day?) — and what marks it done?

4 · THE RULES YOUR TEAM FOLLOWS

The judgment calls, written as rules. Include exact required wording where it matters (notes, flags, messages) and any hard limits. Where a rule lives only in someone's head, write the person's name — we'll interview them.

IF / WHEN...	...THEN DO	WHO OWNS THIS RULE
An invoice arrives from a new vendor	Hold for manager approval	
A required field is blank	Email the customer the missing-info temp	

What must ALWAYS go to a human, no matter what — and to whom?

5 · DATA, COMPLIANCE & APPROVALS

This workflow touches:

- [ ] Customer Records
- [ ] Appointments / Orders
- [ ] Health Information
- [ ] Payments / Billing
- [ ] Documents / Contracts

Sensitive data:

- [ ] Health Information (HIPAA)
- [ ] Payment Data
- [ ] Neither

Do you sign BAAs today? ○ Yes ○ No

We operate data-safe by design — compliant processing, zero-retention AI, nothing identifying leaves your environment.

Who must sign off before go-live (owners, compliance, legal)?

6 · VOLUME, HOURS & CONTACTS

Items per day and minutes each · your operating hours and when the automation may run (nights/weekends so mornings start clean?) · the one person we call with questions, and the escalation contact.

7 · LATER (THE PARKING LOT)

Everything else you'd eventually hand off. Listed here so nothing is lost — the first automation stays focused.

8 · SIGN-OFF

NAME	ROLE	SIGNATURE	DATE