

Think First, Then **AUTOMATE**



Audience Notes & Action Guide
By Scott Todd

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The Big Idea

You can't automate chaos. Technology keeps speeding up, and the pressure to adopt the latest tool isn't going away. But the answer isn't a better tool. It's better thinking. Design the system first, and automate last.

Start every automation idea with one question: "What problem am I trying to solve?"

The Four Traps (the "Muddy Mile")

These traps show up in every process in your business. Your tires are spinning, but you're not moving.

1. Control trap: Work can't move without you or one key person.
 - Ask yourself: What task have I been doing for years that I shouldn't be doing?
2. Variability trap: The same job gets done differently depending on who does it, and the results don't match.
 - Ask yourself: Where are two people doing the same job two different ways?
3. Memory trap: The work only happens if someone remembers to do it.
 - Ask yourself: Which processes are one bad day away from failing?
4. Assumption trap: Decisions run on hunches instead of data, and knowledge lives in people's heads instead of in writing.
 - Ask yourself: Where am I the "Google" of my company?

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The Four Traps (the "Muddy Mile") - continued

Bonus: The patch. Checklists, sticky notes and Slack reminders used to cover a trap you haven't fixed. Every patch adds operational debt: the business keeps moving, but the cost quietly builds.

- Ask yourself: What checklists in my business get ignored?

Automation Comes Last

Elon Musk's five-step process puts automation at the end :

1. Make your requirements less dumb
2. Delete the part or process
3. Simplify
4. Accelerate
5. Automate

If you feel behind on automation, you're not behind. You may have just started in the wrong place.

Think Like an Architect

Automation takes two roles:

- The Architect (your role): Sees where the business is struggling and designs how the process should work.
- The SCALE Practitioner: Turns the architect's design into systems and wires in the technology.

Move from operator to architect. Your role identity determines your impact.

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The SCALE Framework

- Scope the goal
- Clarify the flow
- Automate the trigger
- Leverage the data, with human checkpoints built in
- Elevate the experience for customers and staff

The Braided River: Keep Humans in the Loop

The best automation blends people and technology. Let technology handle what it does best, like math and repetitive steps. Keep people where empathy, judgment and relationships matter.

Example: Two rental car companies used the same AI damage-detection tool. One billed customers automatically and gave them only a chatbot to talk to, which led to public backlash. The other had a person review the damage before billing and kept a human available. Same technology, very different results.

Capture friction the moment you see it

Toyota's Andon cord let any worker stop the line when they spotted a problem. You can't fix what you don't see. When you spot a trap, write it down right away. If you wait, you've created a memory trap.

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Your 12-Second Flight (worksheet page)

The Wright brothers' first flight lasted 12 seconds. They flew four times that day, adjusting after each flight, and improved the result about 7x. You don't need to automate your whole business. You need one flight.

1. One trap I see in my business: _____

2. Which trap is it? ☐ Control ☐ Variability ☐ Memory ☐ Assumption ☐ Patch

3. What problem am I trying to solve? _____

4. Can I delete or simplify this before automating it?

5. Where does a human need to stay involved?

6. My first step this week: _____

When that one is running, find the next one. Automations are like potato chips: you can't have just one.

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Automation Loop™ Worksheet

Step 1: Spot the Problem

What operational breakdown keeps happening in your business?

Step 2: Build with SCALE™

S Scope the Solution

What is the desired outcome?

C Clarify the Flow

What should happen here — and in what order?

A Automate the Trigger

What should automatically happen next?

L Leverage the Data

How will we know it's happening, or not?

E Elevate the Experience

Where can we make this feel effortless and personal?

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Key Numbers

- 73% of CEOs say their company's AI strategy causes them stress or anxiety; nearly half call their AI adoption a massive disappointment. (Writer / Workplace Intelligence survey of 2,400+ executives)
- Inefficiencies cost the average business about 25% of annual revenue. (cited as Harvard Business Review)
- About 30% of daily work activities could be automated, but only about 5% of jobs could be fully automated. (McKinsey)
- Nearly 30% of workers say they're sabotaging their company's AI efforts, mostly out of fear of losing their jobs.
- 67% of small business owners check in on work while on vacation.

The Architect isn't a title you earn someday. It's who you decide to be today. Now go take your first flight.

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Stay Connected with Scott

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process or your business?**

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