ARISE AGENTIC · FREE CHECKLIST

# Where does your team repeat the same work?

Use the Automation Map to spot a useful starting point. Check the statements that sound familiar, then choose one process to discuss with your team.

## 01 Onboarding

- [ ] New customers, members or partners fill in forms or send details by email.
- [ ] Someone chases missing documents or information by hand.
- [ ] Details are retyped from emails or forms into the CRM.

Possible fit: AI assistants & chatbots

## 02 Data & sync

- [ ] The same record is updated in more than one tool.
- [ ] Reports start with exporting a spreadsheet.
- [ ] Teams disagree about which number is right.

Possible fit: Connected apps & data sync

## 03 Screening & approvals

- [ ] Applications or requests wait in a queue for someone to check them.
- [ ] Criteria are applied differently depending on who checks.
- [ ] You'd use AI for replies if someone could approve every draft first.

Possible fit: Review, screening & approval

## 04 Support & tickets

- [ ] Requests arrive by email, chat and forms with no single queue.
- [ ] Follow-ups depend on someone remembering.
- [ ] You can't see how many requests are open right now.

Possible fit: Support & ticket automation

## 05 Rewards, referrals & payouts

- [ ] Bonuses, points or referral rewards are calculated in spreadsheets.
- [ ] Members or partners dispute their balances.
- [ ] You can't show an audit trail for a past payout.

Possible fit: Rewards, referral & loyalty with ledger

## 06 Reporting & KPIs

- [ ] Someone spends hours each week building the same report.
- [ ] Managers start the day without yesterday's numbers.
- [ ] You can't see where new signups stall before they become active.

Possible fit: Scoring, analytics & daily briefings

## Choose one process to look at more closely.

Several checks in one area suggest a conversation worth having. They do not guarantee that automation is the right answer. Start with the volume of work, the time it takes, common exceptions and the person responsible.

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