

My Automation Audit: A 5-Step Litmus Test to Fix Broken Workflows

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A practical worksheet for founders and ops leaders who suspect an automation is costing more than it saves.

This worksheet is for you if you are dealing with a frustrating automated workflow — one that requires constant manual fixes, creates hidden work for your team, or simply is not delivering on its original promise. The goal is not to list problems. The goal is to give you a structured, repeatable process to diagnose the root cause and make a clear decision: **Tweak, Rebuild, or Unwind** the automation.

This connects directly to the core challenge of human-centric system design. The best systems are not the most automated ones. They are the ones where you have deliberately chosen where a human adds value and where a machine does. This audit helps you make that choice with data instead of gut feeling.

How to use this document: Work through all five steps in order. You will need approximately 20–30 minutes and access to basic data about the workflow you are auditing. Fill in the fields, check the boxes, and follow the decision tree at the end. Print it or save it — you will want to revisit it every quarter.

Quick Check: Is Your Automation Actually Broken?

Before you invest time in the full audit, answer one question. What is the **exception rate** (the percentage of times the automated process fails or requires a human to step in and fix something) of the workflow you want to audit?

Question	Your Answer
What is the process you are auditing?	_____
How many times does this process run per week?	_____
How many times per week does it require a manual fix or intervention?	_____
Your Exception Rate (Manual Fixes ÷ Total Runs × 100)	_____ %

How to read your result:

- **Below 2%:** Your automation is healthy. Routine maintenance is normal. You may not need this audit right now.
- **2–5%:** A gray zone. Worth monitoring. Proceed with the audit if the failures are unpredictable or costly.
- **5–10%:** A serious underlying problem is likely. Proceed with the full audit.
- **Above 10%:** The system is almost certainly costing you more than it saves. Proceed immediately.

Note: These thresholds are practical guidelines, not universal standards. Your acceptable exception rate depends on the stakes of the process. A 3% failure rate on an internal Slack notification is trivial. A 3% failure rate on customer invoicing is not. Factor in the context as you work through the steps below.

Step 1: Diagnose the Failure Point

You know the automation is failing. Now identify *why*. Check every cause that applies to your workflow. Most broken automations have more than one.

Category A: Data and Input Problems

- ☐ **Inconsistent input data:** The data feeding the system varies in format, completeness, or quality from record to record.
- ☐ **Manual entry errors upstream:** The automation itself works correctly, but humans are entering information incorrectly before it reaches the system, causing downstream failures.

Category B: Integration and Infrastructure Problems

- ☐ **API or integration changes:** A connected application (your CRM, email platform, spreadsheet tool, payment processor) was updated by its vendor, and the connection broke or changed behavior.
- ☐ **System timeouts:** The process takes too long to execute and is terminated by the platform before it finishes.
- ☐ **Scaling limits:** The automation works fine at low volume but fails or slows dramatically under higher load.

Category C: Logic and Design Problems

- ☐ **Edge cases:** The automation was designed for the most common scenario but fails on legitimate variations it was never programmed to handle.
- ☐ **Flawed core logic:** The fundamental "if X, then Y" rules were built on a misunderstanding of how the actual business process works.
- ☐ **The original process was flawed:** You automated a broken process. The automation faithfully replicates a bad workflow at machine speed. (Research from Autonoly suggests approximately 73% of failed automation projects stem from this specific cause.)

Your diagnosis summary:

How many categories did you check boxes in?

- **1 category:** The problem is likely isolated and fixable.

- **2 categories:** The problem is compound. A simple patch will probably not hold.
- **3 categories:** The automation has systemic issues. A fundamental rethink is likely needed.

Primary failure cause(s)	Number of categories affected
_____	_____

Outcome: You have identified the technical nature of the problem. This directly shapes whether you should Tweak, Rebuild, or Unwind in Step 4.

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Step 2: Calculate the True Cost of Brittleness

"Brittleness" (the tendency of an automated system to break in unpredictable ways when conditions change even slightly) has a real, measurable cost. Most teams dramatically underestimate it because the work is spread across many people in small increments.

Estimate the time your team spends dealing with this broken automation **each week**. Be honest. Include everyone who touches the problem — not just the person who "owns" the fix.

Cost Category	Minutes Per Week
Time spent detecting failures (monitoring dashboards, noticing something is off, reading error alerts)	_____
Time spent diagnosing each failure (figuring out what went wrong this time)	_____
Time spent on manual fixes or workarounds (re-entering data, running the process by hand, correcting outputs)	_____
Time spent communicating about failures (Slack messages, emails, status meetings, explaining to affected colleagues or customers)	_____
Time spent on re-checking downstream outputs that may have been corrupted by the failure	_____
Total Weekly Time Cost	_____ min

Now convert to a monthly cost:

Calculation	Value
Total weekly minutes × 4.3 (average weeks per month)	_____ min/month
Divide by 60 to get hours	_____ hours/month
Multiply by your team's approximate blended hourly cost (salary + overhead, typically in the range of \$40–\$120/hour depending on role and location — use your own figure)	\$ _____ /month

This is a simplified estimate. It does not include harder-to-quantify costs like lost opportunities, delayed customer responses, degraded data quality compounding over time, or the morale cost of repetitive, frustrating work. In practice, the true cost is almost always higher than this number.

Outcome: You now have a tangible dollar figure representing the ongoing drain from this single automation. Write it down. You will compare it against the cost of fixing or replacing the system in Step 4.

My monthly cost of brittleness	\$ _____
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Step 3: Assess the Strategic Impact

Time cost is only half the picture. Some broken automations waste 30 minutes a week but pose zero strategic risk. Others waste 10 minutes but are quietly corrupting your customer data or damaging your brand.

Rate each dimension on a scale of 1 to 5.

1 = No noticeable impact. 5 = Critical, could cause lasting damage.

Impact Dimension	Rating
Customer Experience — Are customers receiving delayed responses, incorrect information, duplicate communications, or a degraded service because of this failure?	[1] [2] [3] [4] [5]
Team Morale — Is the repetitive fixing of this system causing visible frustration, burnout, or cynicism on your team? Are good people spending their time on work that feels pointless?	[1] [2] [3] [4] [5]
Data Integrity — Is the failure creating bad, duplicate, or missing records in your CRM, financial systems, or reporting tools? Is it undermining your ability to make decisions based on your own data?	[1] [2] [3] [4] [5]
Business and Compliance Risk — Could this failure lead to regulatory issues, missed contractual obligations, lost revenue, or legal exposure?	[1] [2] [3] [4] [5]
Skill Atrophy — Has your team lost the ability to perform this process manually because the automation has been in place so long? Would turning it off leave a dangerous knowledge gap? (CIO research identifies this "skills atrophy" as a significant hidden risk of over-automation.)	[1] [2] [3] [4] [5]

Your highest single score: ____

Your total score (out of 25): ____

How to read your total:

- **5–10:** Low strategic risk. The problem is primarily an efficiency issue.

- **11–17:** Moderate strategic risk. The automation is causing real business harm beyond wasted time.
- **18–25:** High strategic risk. This is not just broken — it is actively damaging your operations, relationships, or data.

Outcome: You have separated "annoying but harmless" automations from "quietly destructive" ones. This distinction is critical for the decision in the next step.

Step 4: Make Your Decision (The Decision Tree)

You now have three data points: your failure diagnosis (Step 1), your cost of brittleness (Step 2), and your strategic impact score (Step 3). Use them together.

Path A: TWEAK

Choose this if **ALL** of the following are true:

- ☐ The failure cause is isolated to **one category** in Step 1 (typically Category A or B — a data issue or a broken integration).
- ☐ The monthly cost of brittleness is **below a level you consider acceptable** for a maintenance task.
- ☐ The strategic impact total score is **10 or below**.

Your action plan:

Item	Detail
What specifically needs to be fixed?	
Who owns this fix?	
Deadline for completion	
How will you verify the fix worked? (e.g., monitor exception rate for 2 weeks)	

Path B: REBUILD

Choose this if **ANY** of the following are true:

- ☐ The failure cause involves **Category C** (flawed logic, edge cases, or automating a broken process).
- ☐ Failures span **two or more categories** in Step 1.

- ☐ The strategic impact total score is **between 11 and 17**.

Your action plan:

Item	Detail
What is the root process that needs to be redesigned <i>before</i> re-automating?	_____
Who will map the corrected process (ideally someone who does the work, not just the person who built the automation)?	_____
What edge cases must the new design explicitly handle?	_____
Where will you add a human-in-the-loop checkpoint (a step where a person reviews or approves the output before the process continues)?	_____
Deadline for the redesigned process map	_____
Deadline for the rebuilt automation	_____

Path C: UNWIND

Choose this if ANY of the following are true:

- ☐ The exception rate is **above 10%**.
- ☐ Any single strategic impact dimension scored **4 or 5**.
- ☐ The strategic impact total score is **18 or above**.
- ☐ You checked "flawed core logic" or "the original process was flawed" in Step 1.

Your action plan:

Item	Detail
When will you turn off the automation? (Recommended: within the next 48 hours.)	_____

Item	Detail
What manual process or checklist will replace it immediately?	_____
Who will own the manual process during the transition?	_____
What documentation or training is needed so the team can run this manually? (Check the skill atrophy score — if it was 3+, you need a brief retraining period.)	_____
Will you attempt to re-automate later? If yes, what must be true first?	_____

My decision: ☐ TWEAK ☐ REBUILD ☐ UNWIND

Step 5: The Post-Decision Safeguard

Making the decision is not the end. This step ensures you do not end up back here in three months with the same problem.

Set a review date. Regardless of which path you chose, schedule a follow-up check.

Path	Recommended Review Interval
TWEAK	2 weeks after the fix is deployed
REBUILD	4 weeks after the new automation goes live
UNWIND	8 weeks (to evaluate whether manual is sustainable or if a new automation attempt is warranted)

My review date: _____

On that date, re-run the Quick Check from page 2. Calculate the new exception rate. If it has not improved, escalate to the next path (Tweak → Rebuild, or Rebuild → Unwind).

One non-negotiable rule going forward: Every automation you run should have a defined owner, a documented exception-handling process, and a quarterly review on the calendar. Automation without ongoing human oversight is not efficiency — it is a liability.

A Real-Life Scenario: The Broken Lead Router

This is what the full audit looks like in practice.

The situation: A mid-size B2B company had a sales automation that assigned incoming leads to the correct sales representative based on territory and company size. It was built two years ago and worked well initially.

The Quick Check result: The automation was running approximately 200 times per week. It required manual intervention roughly 40 times. **Exception rate: approximately 20%.** This is well above the 10% threshold.

Step 1 diagnosis: Two categories were affected. The system could not handle new international postal codes that had been introduced since the automation was built (edge cases, Category C). Additionally, the CRM integration was timing out under increased lead volume (infrastructure, Category B).

Step 2 cost: The sales operations manager spent an estimated 3 hours per week detecting, diagnosing, and manually re-routing failed leads. Two sales reps spent roughly 1 hour each per week following up on leads that had been delayed or misrouted. Total: approximately 5 hours per week, or roughly 21.5 hours per month. At a blended team rate, this represented a significant monthly cost — and that is before accounting for lost or delayed revenue from misrouted leads.

Step 3 impact: Customer Experience scored 4 (leads were being contacted late or by the wrong rep). Data Integrity scored 3 (CRM records were inconsistent). Business Risk scored 5 (revenue was being directly lost). Total strategic impact: 17, at the high end of moderate, with a critical single-dimension score of 5.

Step 4 decision: UNWIND, then REBUILD. The team turned off the automated lead router immediately. For two weeks, the sales ops manager assigned leads manually using a simple spreadsheet checklist. This stopped the bleeding — no more silent failures, no more lost leads. Then, they rebuilt the automation from scratch with corrected postal code logic, a more robust API connection with retry logic, and one critical addition: any lead that the system cannot confidently assign is now flagged for immediate human review instead of failing silently. The human-in-the-loop checkpoint was the key design change.

Step 5 safeguard: They scheduled a review for four weeks post-launch. The new exception rate dropped to approximately 2%. The remaining exceptions were all correctly flagged for manual review.

The lesson: The original failure was not a technology problem. It was a design problem — the system had no fallback for situations it could not handle. Adding a human-in-the-loop step made the rebuilt version dramatically more resilient.

Why This Matters for Human-Centric System Design

This audit is not just about fixing one workflow. It is about building the muscle to design systems where humans and automation work together deliberately. Research suggests that 30–50% of automation projects fail to deliver expected benefits in the first year (Venko Systems), and that 30% of AI projects overshoot their budgets (Gartner) — largely because teams skip the kind of diagnostic work you just completed. Every time you run this audit, you are training yourself to see automation as a design decision, not a default. That shift in thinking is what separates resilient operations from brittle ones.

Your Next Steps

Step 1: Apply your decision now.

Based on your result (Tweak, Rebuild, or Unwind), create a task in your project management system today. Assign it an owner and a deadline. Use the action plan tables from Step 4 as your starting brief.

→ For a deeper look at calculating the full Total Cost of Ownership of your automations — including technical debt, training costs, and the hidden cost of skill atrophy — read the full guide:

[Read: [The Automation Trap — Principles for Human-Centric System Design](#)]

Step 2: Get an expert review if you chose Rebuild or Unwind.

If your audit pointed to a Rebuild or Unwind decision, consider bringing in an operations consultant or systems architect who specializes in process design — not just the tool vendor who built the original automation. The goal is to redesign the underlying process before re-automating it. This is especially important if your Step 1 diagnosis included "the original process was flawed."

Save or print this worksheet. Schedule a quarterly automation review using this same framework for every critical automated workflow in your operations.

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