

Before You Automate

The 15-Minute Decision Workbook

Make better technology decisions before spending money on software, automation, or AI.

 Built from 12+ years across warehouses, logistics, manufacturing and retail.

12+
YEARS IN AUTOMATION

\$10M+
IN AUTOMATION PROJECTS
DELIVERED

4
INDUSTRIES SERVED

✓ Signs you're ready

- The process is documented, not tribal knowledge
- It runs the same way every single time
- Someone already owns it today

✗ Signs you're not

- Every team member does it a little differently
- Nobody can say what "success" looks like
- The data behind it is incomplete or messy

THE LADDER IN ACTION

A warehouse pick-and-pack process, followed rung by rung:

01 UNDERSTAND
Pickers walk the floor from memory. No documented route or sequence.

02 SIMPLIFY
Zones reorganised by pick frequency before anything else changes.

03 STANDARDIZE
Every picker now follows the same route, the same way, every shift.

04 AUTOMATE
Barcode scanning and pick-by-voice layered onto the proven route.

05 AMPLIFY
AI forecasts peak-day staffing once the pattern is well established.

Automation Readiness Self-Check

Read through and count how many are already true for the process you have in mind.

- ✓ This task repeats on a regular schedule
- ✓ The steps are the same every time
- ✓ You can measure success in a number
- ✓ Someone owns this process today
- ✓ The underlying data is clean and reliable

0-2 TRUE  5 TRUE

Fewer than 3? Fix the process first. Automation will only make an inconsistent process fail faster.

THE AUTOMATION LADDER

Understand
01
Map what happens today

Simplify
02
Remove steps first

Standardize
03
Same way, every time

Automate
04
Now it has something to run on

Amplify
05
AI or advanced systems, if it fits

1

CI PRINCIPLE

Technology follows process. It never leads it.

Find Your Biggest ROI

Not every process deserves automation at the same time - or the same kind of automation. Here's the range, from a quick fix to a capital project.

● Easy - weeks, low cost ● Medium - months, real budget ● Hard - capital project

TIER	AREA	ROI	DIFFICULTY	WHAT THIS USUALLY LOOKS LIKE
●	Email & Scheduling	High	Low	Routing, triage, and booking links that remove back-and-forth
●	Order & Onboarding	High	Low	Confirmations, welcome sequences, standard follow-ups
●	WMS & ERP	Medium	Medium	Core systems - big payoff, but real change management involved
●	Scanning & Labeling	Medium	Medium	Barcode, RFID and print-and-apply once volumes justify it
●	AGV / AMR & Robotics	High	High	Real capital investment - the payoff is real, so is the runway
●	Conveyors & Sorters	High	High	Facility-level automation - plan in quarters, not weeks

The pattern worth noticing

Easy wins build trust and free up time fast. Hard automation moves the real needle on cost and capacity - it just needs the process, the volume and the budget to already be proven. Most businesses are ready for more of the "hard" tier than they think - they just started in the wrong order.

ROI vs. Effort

Bar length = effort to implement. Colour = long-term reward.



Reading the chart

Notice the teal bars are both short (Email) and long (AGV/AMR) - high reward isn't only found in quick wins. The hard tier takes longer to justify, but it's not lower value. It's a different decision, made at a different stage.

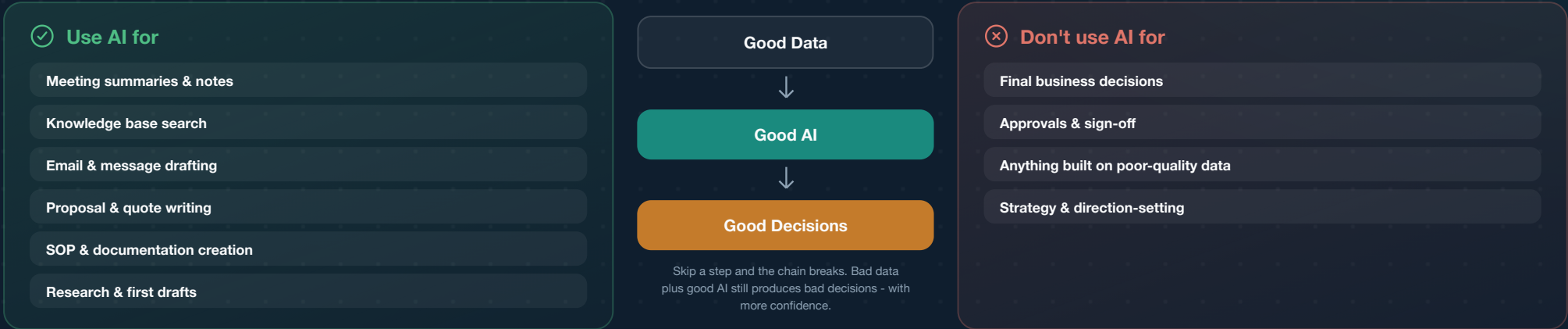
2

CI PRINCIPLE

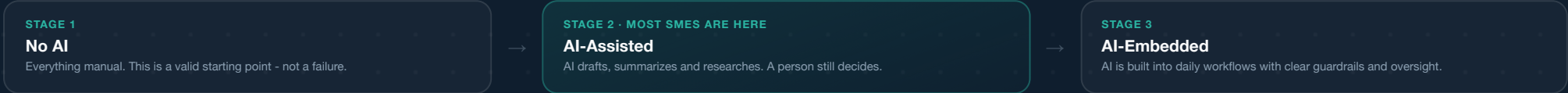
Automate repetition. Not exceptions.

Where AI Helps. Where It Hurts.

AI is a multiplier, not a decision-maker. Where it sits in your process determines whether it helps - or quietly makes things worse, faster.



WHERE MOST SMALL BUSINESSES ACTUALLY ARE - THE AI MATURITY SNAPSHOT



SAME AI TOOL. DIFFERENT INPUT. DIFFERENT RESULT.



3

CI PRINCIPLE

AI multiplies what already exists.

Before You Spend A Dollar

Read through this list honestly. Every "not yet" is exactly where to focus before you evaluate any vendor or tool.

01 Process documented
Written down, not just understood in someone's head

CHECK

02 ROI estimated
A real number, even a rough one

CHECK

03 Success KPI defined
You'll know clearly if it worked

CHECK

04 Data quality checked
Clean enough to trust the output

CHECK

05 Owner assigned
One person accountable, not "the team"

CHECK

06 Bottleneck identified
You know exactly what's actually slow

CHECK

✗ Buying software before defining success

The tool gets chosen first - the outcome gets reverse-engineered afterwards, if at all.

✗ Automating an inconsistent process

It doesn't become reliable because it's automated - it fails faster, in more places.

✗ Expecting AI to fix operational problems

AI executes a broken process more consistently - and more confidently.

4 CI PRINCIPLE
If you can't measure it, you're not ready to automate it.

NEED AN INDEPENDENT OPINION?

If you've worked through this and you're still unsure -

**No software to sell.
Just guidance.**

1 Visit catalinivana.com
Everything free, no signup required to look around



2 Apply for a free session
A few quick questions about your situation



3 30 minutes, together
An honest, independent second opinion

Catalin Ivana
Independent Business Automation Advisor

www.catalinivana.com

This workbook reflects general principles drawn from real project experience - it is not tailored advice for your specific business. Any examples used are illustrative, not a guarantee of results. I accept no responsibility for investment decisions, financial losses, or unrealized profits arising from the use of this material - outcomes depend entirely on your own process, data, execution, and circumstances outside my control. Nothing here replaces an actual conversation about your specific situation. If you're making any technology, financial, or business decision, get specific advice first - mine or someone else's.