FREE AI RESOURCE

The AI Automation Guide

A step-by-step framework for automating your first workflow with AI — from picking the right task to measuring results.

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1 Pick the Right Task to Automate

Not every task should be automated. Start with tasks that are repetitive, rule-based, and time-consuming — not tasks that need judgment or a personal touch.

Good candidates: Writing first drafts, generating social captions, summarizing documents, answering FAQs, sorting/tagging content.

Poor candidates: Final client communication, sensitive decisions, anything requiring deep context only you have.

Quick test: If you do the same task the same way more than 3 times a week, it's likely automatable.

TIP

Write down the task in one sentence. If you can't describe it simply, it's probably not ready to automate yet.

2 Choose Your AI Tool

Match the tool to the task type, not the other way around.

Writing/content tasks: ChatGPT, Claude, or a specialized writing tool like Jasper.

Multi-step workflows: Agent-based platforms like Claw AI Army that chain several tasks together.

Visual content: Midjourney, Canva AI, or Leonardo AI depending on the output you need.

Video production: VideoClawBot or MagicFlixAI for automated video creation and publishing.

3 Map the Workflow

Before automating anything, write out every step of the task as it happens manually today.

- **List the trigger:** What starts the task? (a new lead, a scheduled time, a form submission)
- **List each action:** What has to happen, in order, for the task to be done?
- **List the output:** What does "done" look like, and where does the result need to go?

TIP

If your workflow has more than 5-6 steps, break it into two smaller automations instead of one complex one.

4 Build & Test on a Small Scale

Don't automate everything at once. Test with a small, low-risk batch first.

- Run the automation on 5-10 examples before trusting it with your full volume.
- Compare AI output side-by-side with what you'd have produced manually.
- Note any edge cases where the automation breaks down or produces poor results.

5 Add Human Checkpoints

Full automation isn't always the goal — a human review step at the right point protects quality without losing the time savings.

- **High-stakes outputs** (client-facing content, financial decisions): always add a review step before publishing.
- **Low-stakes outputs** (internal drafts, first-pass summaries): automate fully, spot-check occasionally.
- Set a simple approval step — even a quick "yes/no" check — for anything that goes out under your name.

6 Measure and Improve

An automation that isn't tracked can quietly get worse over time without you noticing.

- **Track time saved:** Compare how long the task took before vs. after automating.
- **Track quality:** Periodically review a sample of automated output for errors or drift.
- **Revisit monthly:** Tools and prompts improve — check every month if a better approach now exists.
