Your First AI Automation

The step-by-step sequence to plan and launch your first automation — on one page.

1. **Audit workflows first**
   Find one repetitive, high-volume task that doesn't need much judgement. Name the specific problem (e.g. "15 hrs/week on invoices"), not "use AI".

2. **Check your data is ready**
   Get the records the task relies on into one reliable place — don't skip it.

3. **Set your success metric — up front**
   Decide what you'll measure (hours saved, error rate, response time) and record the "before" figure now.

4. **Write a one-page AI policy**
   Approved tools, what data may be entered, where a human stays in the loop, and UK GDPR compliance.

5. **Run a 30-day pilot**
   One low-risk workflow, a human checking every output. Prove the value on your real data before scaling.

6. **Measure, review, scale**
   Compare to baseline, ask the team, then expand — or use a clear "kill criterion" and try a different task.

Avoid these mistakes

- [ ] Chasing a flashy demo instead of a real bottleneck
- [ ] Automating a broken process (fix it first)
- [ ] Trying to automate everything at once
- [ ] Building in secret and spooking your team
- [ ] Buying disconnected tools that don't integrate
- [ ] "Set and forget" — budget a few hours a month for upkeep

Want it done properly the first time?

BLANCORE builds first automations for UK businesses with a scoped pilot before any big spend. Start free at **blancore.tech**.

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