BUILDER TOOLKIT

Automation planner

Turn a repeated task into a safe automation: trigger, steps, AI, approvals and an off switch.

Use it: When you notice you do the same task every week.

The task today

What do you do, step by step?

e.g. Copy enquiries from email into a sheet, reply, tell the team

How often, and how long does it take?

What goes wrong when it's done by hand?

The automation

Trigger (what starts it)

e.g. New email with label Enquiry

Steps in order

Where AI helps (summarise, sort, draft)

Where a person approves

e.g. Before any reply is sent

Where the result goes

e.g. Sheet + team channel

Safety

☐ Only the access it needs (read-only where possible)

☐ Personal data stays in approved tools

☐ Tested with 10 realistic examples

☐ Written note of how to pause or turn it off

Fill it in with AI

Help me plan an automation for this weekly task: [task]. Ask me questions one at a time to fill in the trigger, steps, where AI helps, where a person approves, where results go and the safety checks. Then give me the build steps for [Zapier/Make/n8n].

https://digitalbuilders757.com/university/study/toolkit/automation-planner