

The Three-List Worksheet

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Before you buy any AI tool, sort what your business actually does into three lists. Most people start automating in the wrong place because they never separated these. Fill this out during a meeting, not after; the point is to leave with your own list, not ours.

Instructions

- List 1, Pure repetition: tasks you do exactly the same way every single time. No judgment call involved. Start automating here first, it's the lowest-risk, highest-return place to begin.
- List 2, Needs judgment every time: tasks where the right answer genuinely depends on the situation. Never automate these blind; AI can assist, a person should stay in the loop.
- List 3, Both: tasks that are repetitive most of the time but occasionally need a judgment call. This is usually the real opportunity zone, once you know where the judgment calls actually happen.

Pure repetition	Needs judgment every time	Both

What to do next

Start with one item from List 1. Automate it completely before touching List 3. Most businesses that stall out on AI tried to automate a List 3 item first, hit a judgment call the system couldn't handle, and gave up on the whole idea instead of just that one task.