

Four tabs, one **Monday morning**

The workbook is the actionable half of the playbook: the parts you answer, in a file your team can own. **Open the workbook in Excel, Google Sheets or Numbers** and work through the four tabs in order. The yellow cells are yours; everything else computes itself.

1

Your numbers

Six inputs: people, hours, the share a platform absorbs, growth, and the two costs. **The results below them calculate live:** hours back, roles you don't have to add, avoided hiring, payback, plus the uncashed-checks line from chapter 02. Same math as the calculators on the playbook page.

2

The workflow inventory

List every workflow the way it actually runs: owner, tool, hours a month, pain 1 to 5. **The priority score fills itself (hours × pain)**, and the highest score is the workflow you map first. A dozen common ones are seeded to start you off; add your own below them.

3

The curve

Four stages, one Monday each. **Mark the one that sounds like yours.** The "outgrown it when" column is the test: the day it's true, the next stage is due.

4

What stays human

Six calls that never automate: payment execution, checks and mail, eligibility, pricing, everything court-facing, government submissions. **Get the room to agree before anyone builds anything.** This list is what makes the rest safe to automate.



Fill it with the people who do the work, not for them. An hour in a room gets honest hours and honest pain scores, and the inventory doubles as the agenda for any mapping workshop, ours or your own.