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## Start Your Automation Project

*Tell me a little about your "manual nightmare," and I'll tell you how we can automate it.*

### 1. The "Pain Point" (Short Answer)

*“What is the specific repetitive task that is currently consuming your time?” (Example: Manually entering invoice data from emails into Excel.)*

### 2. The Time Drain

*“How many hours per week does your team spend on this process?”*

### 3. The Toolset

*“Which software/platforms are involved in this workflow? (Check all that apply)”*

Excel / Spreadsheets

SQL / Databases

Cloud Apps (SharePoint, Salesforce, etc.)

Legacy Desktop Software

Other:

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#### 4. The Goal

*“What is your primary goal for this project?”*

**Speed:** I need this done faster.

**Accuracy:** I need to eliminate human error/typos.

**Integration:** I need my apps to talk to each other.

**Scalability:** I need to handle more volume without hiring more staff.

#### 5. Technical Environment

*“Does your business currently use Microsoft 365 / Power Automate?”*

Yes

No / Not Sure