AUTOMATION ACCEPTANCE HANDOFF / 01

MAP ONE CURRENT PROCESS

Use neutral labels. Keep credentials, identifiers, private data and production records out.

A helpful preparation resource from PickYourPro.ai. Fill in digitally or print. Keep your completed copy private.

Process A / current purpose / no sensitive detail

Trigger A / ordinary description / initiating role

Input A / source category / owner role

Output A / destination category / recipient role

Human step or current handoff / role / question

Desired outcome or constraint / no promised savings

Preparation only. Not architecture, integration design, software or AI selection, configuration, access authorization, testing, release, security, compliance or legal advice. Keep credentials and private data out.

AUTOMATION ACCEPTANCE HANDOFF / 02

MAP EXCEPTIONS, ACCESS AND OWNERSHIP

Ask the provider to define responsibilities. Do not enter secrets or configure any system here.

Exception A / human review point / escalation role

Failed-run signal / response owner / record location

System A to System B responsibility / included / excluded

Data preparation or validation responsibility / owner

Access request, approval and removal roles / no credentials

Dependency, change trigger or decision still open

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AUTOMATION ACCEPTANCE HANDOFF / 03

CHECK THE ACCEPTANCE-READY PACKET

Tick what is organized. These checks do not approve architecture, access, testing, release, security or compliance.

- [ ] Process, system and role labels are neutral and consistent
- [ ] No credential, token, identifier or private data is included
- [ ] Current trigger, input and output are visible without tool selection
- [ ] Human exception and escalation ownership are requested
- [ ] System, data and access responsibilities are separated
- [ ] Provider-defined test evidence and acceptance record are requested
- [ ] Failure, change, release and support ownership are requested
- [ ] No architecture, permission, security or compliance approval is recorded

Process, input or output question still open

Exception, access or responsibility question still open

Test, acceptance, support or handoff question still open

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AUTOMATION ACCEPTANCE HANDOFF / 04

QUESTIONS FOR THE AUTOMATION PROVIDER

Ask every provider the same process, responsibility, exception, test and handoff questions.

Discovery: how will the current process and owners be confirmed?

Scope: which systems, data and access roles are included?

Exceptions: how are failed runs and escalations handled?

Testing: what evidence and acceptance record will you propose?

Change: how are release and support responsibilities documented?

Handoff: which runbook, training and closeout records are provided?

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AUTOMATION ACCEPTANCE HANDOFF / 05

COMPARE ACCEPTANCE AND HANDOFF

Use Providers A and B with the same neutral process. Clarify different system boundaries or support models before comparing proposals.

Providers A / B / proposal references / dates

Discovery, process and responsibility scope - A / B

Exceptions, access, tests and acceptance - A / B

Release, support, runbook, handoff and open questions - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai only if you choose, then start a Web Design & Development request for business automation. Share a non-sensitive process, exception and acceptance brief so participating pros can compete with proposals. Compare discovery, build, test, handoff, support, timing and fit. A private systems, data and authorized-access discussion may be needed before a final proposal.

One request. Every pro's best offer.

Start a request

Participation varies. A private systems, data and authorized-access discussion may be needed before a final proposal.

Planning guide: https://www.pickyourpro.ai/services/business-automation

NIST Cybersecurity Framework 2.0 for Small Business (official reference)

NIST Cybersecurity Framework 2.0 Small Business Quick-Start Guide (official reference)

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