

Lesson 37 Action Workbook

Building Systems and Automation

Module 5: Growing Your Freelance Business

Map your workflow

Choose one process you understand before automating it.

Name: _____ Date: _____

Workflow map

Record the start event, ordered steps, inputs, owner, and expected result.

SOP and quality checks

Describe steps, exceptions, output format, approval, and update date.

Reusable template

Choose a template and list details to customize and check each time.

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Design and test an automation

Begin with one internal action and fictional sample data.

Name: _____ Date: _____

Automation plan

Define trigger, conditions, action, unique ID, and human review point.

Test cases

Record normal, missing-data, duplicate, time-zone, and failure tests.

Manual fallback

Explain how to detect a failure, check partial results, and finish manually.

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Monitor and improve

Count setup, checking, and maintenance when measuring time saved.

Name: _____ Date: _____

Access and ownership

List permissions, connected accounts, monitoring owner, and review date.

Monthly review

Record volume, time saved, maintenance, costs, errors, and changes needed.

Next improvement

Choose one change, assign an owner, and set the next test date.