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When to Automate and When to Humanize: 25 Point Self-Audit

25 point operator self-audit • modonix.com
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How to use: go through each section and check every box that applies. Tally your score at the end. Any unchecked box is a documented operational gap.

Process Mapping Readiness

1

☐

Have you documented every step of this workflow before automating it?

2

☐

Can you explain the current process end to end without checking notes?

3

☐

Has anyone timed each manual step in this workflow in the last 90 days?

4

☐

Did you run a full process audit before selecting an automation vendor?

5

☐

Can you name the exact failure point this automation is meant to fix?

Customer-Facing Bot Limits

6

☐

Can every customer reach a human within two chatbot exchanges or less?

7

☐

Does your bot resolve simple account requests without escalation?

8

☐

Have you measured how many customers abandon chats before resolution?

9

☐

Is there a visible bypass option to reach a human on every screen?

10

☐

Do you track customers who stopped ordering after a bad bot experience?

Human Judgment Zones

11

☐

Have you listed tasks that require negotiation or instinct, not logic?

12

☐

Does staff still manually handle delicate partner or vendor relationships?

13

☐

Can you identify which decisions require tacit knowledge over rules?

14

☐

Have you flagged any task where judgment matters more than speed?

15

☐

Is there a documented list of tasks marked do not automate?

Hidden Automation Costs

16

☐

Have you calculated ongoing maintenance hours for each automation?

17

☐

Did projected cost savings account for lost institutional knowledge?

18

☐

Is there a backup employee who still knows the manual process by hand?

19

☐

Have you audited automation scripts for undocumented complexity this quarter?

20

☐

Can your team fix a broken automation without calling the vendor?

Decision Framework Checks

21

☐

Do you have a written rule for when automation hands off to a human?

22

☐

Was the target cycle time validated against real production data?

23

☐

Did you set realistic speed targets before building this automation?

24

☐

Do you have budget and technical staff to maintain this automation?

25

☐

Is there a scheduled review date to re-check this automation's output?

SCORING GUIDE

Score	Level	What it means
0 to 11	CRITICAL	Structural failures are actively destroying margin
12 to 19	MODERATE	Gaps in two or three areas that need immediate attention
20 to 25	STRONG	Systems are solid, focus on optimization

Book a free data audit at modonix.com/services. We identify your top 3 margin leaks in one session. Written by Ahmed Abuswa, Modonix.com

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