

# Workflow decision worksheet

Prepared September 13, 2026. Blank planning template; not a tested workflow or a savings claim. Fill locally. Do not put passwords, API keys, client records, or private subscriber data here.

## 1. Name the job

Task and intended user:

---

Trigger:

---

Required output and deadline:

---

Current owner:

---

Current manual steps:

---

Existing tool that already performs part of this job:

---

Specific paid feature being considered:

---

Evidence the feature is needed:

---

## 2. Compare complete costs

| Input                                | Manual/current path | Proposed path |
|--------------------------------------|---------------------|---------------|
| Next invoice amount, including tax   |                     |               |
| Invoice date and billing interval    |                     |               |
| Connected apps, usage and fees       |                     |               |
| Setup hours                          |                     |               |
| Tasks per month, observed or assumed |                     |               |

# Workflow decision worksheet

Continued - record observations, not assumptions.

| Input                                  | Manual/current path | Proposed path |
|----------------------------------------|---------------------|---------------|
| Minutes per task                       |                     |               |
| Monitoring/exception minutes per month |                     |               |
| Assumed value per hour                 |                     |               |
| Cancellation/export work               |                     |               |

Calculate manually:

1. Monthly task time = tasks × minutes per task ÷ 60.
2. Total recurring hours = task time + monitoring minutes ÷ 60.
3. Net hours saved = current hours - proposed hours.
4. Assumed time value = net hours saved × your hourly assumption.
5. Compare that value with the full recurring bill. Include setup separately for the first month.

Time value is an assumption, not money received. Annual invoices count in full in the month charged. A monthly cash cap must include every planned charge and tax in that month.

## 3. Specify behavior before activating automation

| Case                          | Expected output | Actual observation | Date/plan |
|-------------------------------|-----------------|--------------------|-----------|
| Normal new item               |                 |                    |           |
| Same event twice              |                 |                    |           |
| Item cancelled/refunded       |                 |                    |           |
| Item completed before message |                 |                    |           |

# Workflow decision worksheet

Continued - record observations, not assumptions.

| Case                             | Expected output                                 | Actual observation | Date/plan |
|----------------------------------|-------------------------------------------------|--------------------|-----------|
| Provider error after side effect | Stop for reconciliation if outcome is uncertain |                    |           |
| Downgrade/cancel subscription    |                                                 |                    |           |

An expected output is not a passing result. Leave actual observation blank until tested.

## 4. Trial and purchase decision

Trial activation date:

---

Trial renewal date and exact amount:

---

Automatic renewal behavior confirmed where:

---

Cancellation deadline/reminder:

---

Month's total cash including this charge:

---

Decision: keep manual / investigate / trial / subscribe / stop:

---

Reason and evidence:

---

Next review date:

---

# Workflow decision worksheet

## 5. Optional domain/email responsibility map

| Job                    | Provider/account owner | Renewal date/cost | Verification still needed |
|------------------------|------------------------|-------------------|---------------------------|
| Domain registration    |                        |                   |                           |
| Active DNS             |                        |                   |                           |
| Website hosting        |                        |                   |                           |
| Ordinary reply mailbox |                        |                   |                           |
| Newsletter sending     |                        |                   |                           |

Keep provider-generated DNS values in an appropriate configuration record. This worksheet does not supply DNS records or establish successful setup.