

Rule card before automation

Define the decision first. This sheet separates inputs, rules, permitted actions and exceptions.

1. Process name and goal

2. Trigger / input data

3. Required fields

4. Decision rules (If ..., then ...)

5. Permitted automatic output

6. Stop condition / human handoff

Rule card before automation

Example from the case material: Hofmann

Select service, capture deployment details, calculate distance, apply surcharges, output price, send PDF. 38 enquiries in 7.5 weeks and 21 of 38 outside office hours are measured. Conversion remains pending.

Test case with expected output**Metric, baseline and period****Accountable person****Version / date****Acceptance prompt**

If you cannot name a stop condition and a measurement, the process is not ready for automation.