

# Automation Discovery — Client Workbook

Prepared by the Mortar Automation Team · Confidential

**How to fill this out:** Type directly into this document — your answers save on this device as you go. When you are done, use **Complete Discovery** below to send them to us, or print to PDF — or skip the typing entirely: book a 20-minute call and we'll fill it out together while you talk. Screenshots welcome anywhere.

## YOUR DETAILS

Name \*

Email \*

Business Name \*

Business URL (Optional)

https://

Phone \*

## 1 · WHAT YOU WANT HANDLED — THE STARTING WORKFLOW

The single task you most want off your team's plate. We build it end-to-end first; more workflows follow once this one is running. Examples: incoming orders/results intake, new-customer intake & record prep, renewals & billing follow-ups, status updates and follow-ups, report preparation — or name your own.

In your own words: what should be handled for you, start to finish?

How will you judge it's working? (hours back, faster turnaround, nothing missed)

## 2 · ACCESS — WHAT WE NEED TO BUILD ANYTHING

These answers determine our build timeline more than anything else in this document.

Remote access to a workstation (e.g., a spare computer we can reach securely):

☐ Yes, Can Arrange ☐ Need to Discuss ☐ No

A dedicated login for the automation in your main system:

☐ Possible ☐ Shared Login Only ☐ Unsure

Two-factor codes on any logins:

☐ Yes ☐ No ☐ Some

Where do codes go (phone/email/app)?

Every system/portal this workflow touches (software names; note web vs installed):

### 3 · THE WORKFLOW TODAY — STEP BY STEP

One row per step, exactly as your team does it now. This table becomes the automation's script — the most valuable page here.

| # | WHAT HAPPENS (OPENED, CLICKED, TYPED, CHECKED) | SYSTEM | WHO | TIME |
|---|------------------------------------------------|--------|-----|------|
| 1 |                                                |        |     |      |
| 2 |                                                |        |     |      |
| 3 |                                                |        |     |      |
| 4 |                                                |        |     |      |
| 5 |                                                |        |     |      |
| 6 |                                                |        |     |      |

What starts an item (something arrives? a queue fills? time of day?) — and what marks it done?

### 4 · THE RULES YOUR TEAM FOLLOWS

The judgment calls, written as rules. Include exact required wording where it matters (notes, flags, messages) and any hard limits. Where a rule lives only in someone's head, write the person's name — we'll interview them.

| IF / WHEN...              | ...THEN DO                               | WHO OWNS THIS RULE |
|---------------------------|------------------------------------------|--------------------|
| An invoice exceeds \$500  | Hold for manager approval                |                    |
| A required field is blank | Email the customer the missing-info temp |                    |
|                           |                                          |                    |
|                           |                                          |                    |

What must ALWAYS go to a human, no matter what — and to whom?

### 5 · DATA, COMPLIANCE & APPROVALS

This workflow touches:

- ☐ Customer Records   ☐ Appointments / Orders   ☐ Health Information   ☐ Payments / Billing  
☐ Documents / Contracts

Sensitive data:

- ☐ Health Information (HIPAA)   ☐ Payment Data   ☐ Neither  
Do you sign BAAs today?   ☐ Yes   ☐ No

We operate data-safe by design — compliant processing, zero-retention AI, nothing identifying leaves your environment.

Who must sign off before go-live (owners, compliance, legal)?

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### 6 · VOLUME, HOURS & CONTACTS

Items per day and minutes each · your operating hours and when the automation may run (nights/weekends so mornings start clean?) · the one person we call with questions, and the escalation contact.

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### 7 · LATER (THE PARKING LOT)

Everything else you'd eventually hand off. Listed here so nothing is lost — the first automation stays focused.

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### 8 · SIGN-OFF

| NAME | ROLE | SIGNATURE | DATE |
|------|------|-----------|------|
|      |      |           |      |
|      |      |           |      |
|      |      |           |      |