



Chat
Auto-reply
active



CRM
Contacts
synced

AI Automation Troubleshooting Guide



Database
Records
updated

7 Checks to Fix Automations That Aren't Working

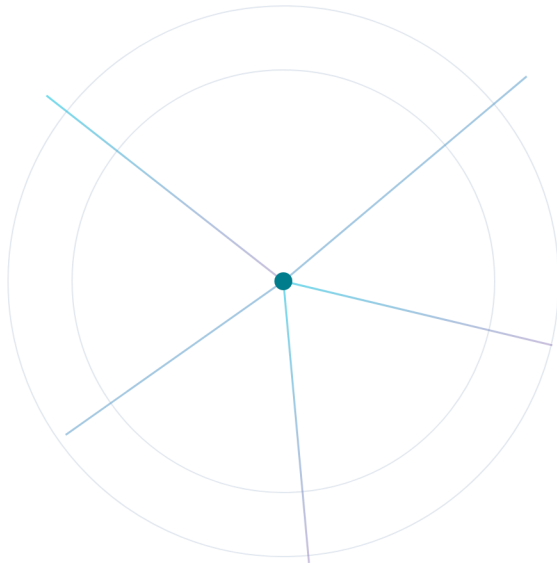


Email

Before replacing your automation, make sure you're not overlooking the simple issues that cause most failures.



AI Engine
Coordinating
workflow

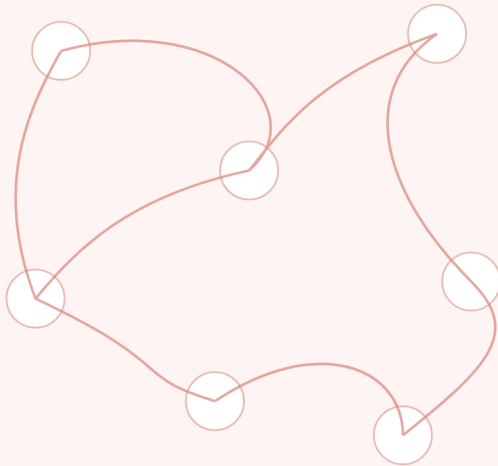
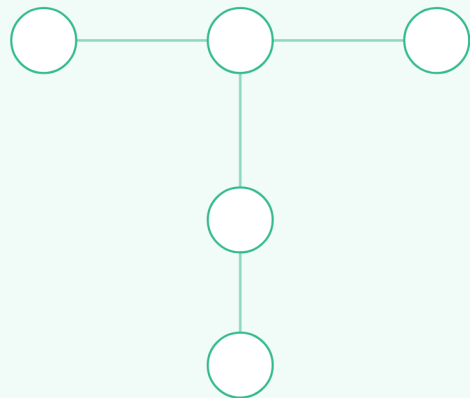


● Workflow health: monitored

Fix the Process Before You Automate It

Many businesses automate inefficient workflows and expect AI to solve the problem. Automation only speeds up the process — it doesn't improve a broken one.

- ✓ Document every step
- ✓ Remove unnecessary tasks
- ✓ Standardize the workflow
- ✓ Then automate

BEFORE**AFTER**

Automation multiplies efficiency — not chaos.

Start Small

Don't automate your entire business at once. Instead, choose one repetitive process and make it reliable before expanding.

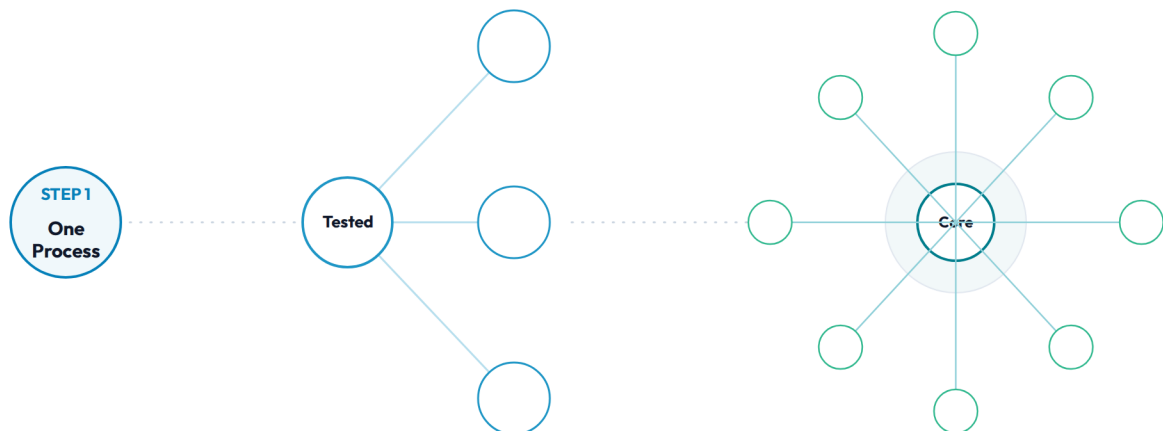
Contact forms

Lead routing

Appointment booking

Invoice notifications

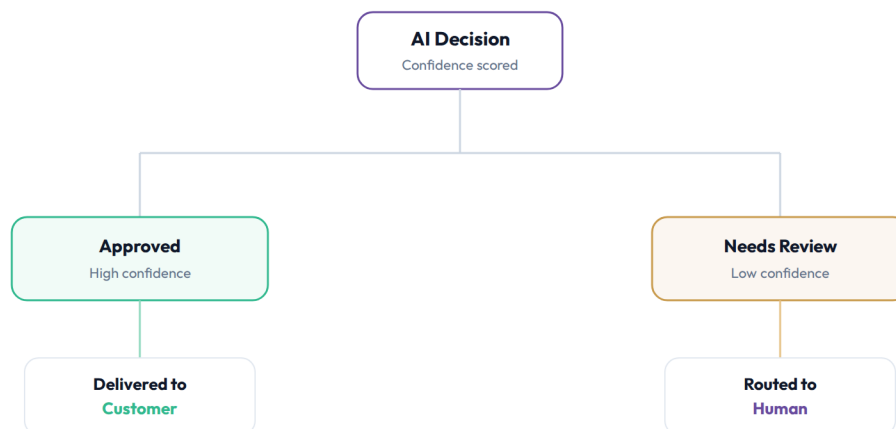
Customer follow-ups



Add Human Review

AI can make mistakes. Critical workflows should always include a manual approval step when confidence is low or important decisions are involved.

- **Quotes**
- **Customer emails**
- **Contracts**
- **AI-generated content**
- **Pricing decisions**



Monitor Your Automation

Launching an automation isn't the finish line. Review performance regularly to catch problems before they become expensive.

WEEKLY CHECKLIST

- ✓ Failed runs
- ✓ Processing time
- ✓ Customer feedback
- ✓ API errors
- ✓ Success rate

Automation Overview

• All systems healthy

SUCCESS RATE

98.4%

↑ 2.1% this week

AVG. PROCESSING

1.8s

↑ Stable

FAILED RUNS

3

↓ Review needed



If you're not measuring it, you're guessing.

Choose the Right Tool

Not every workflow requires AI. Sometimes a simple automation platform is faster, more reliable, and easier to maintain.



SIMPLE TASKS

Predictable, rule-based steps with a clear trigger and outcome.

Traditional Automation



COMPLEX DECISIONS

Handles judgment calls where rules alone fall short.

AI Assistant



REASONING & CONTEXT

Coordinates multiple steps and tools toward a broader goal.

AI Agent

The best solution is the simplest one that solves the problem.

BEFORE YOU LAUNCH

Automation Readiness Checklist

Run through this list before treating any automation as production-ready.

☐ Process documented

☐ Workflow simplified

☐ Goal clearly defined

☐ Human fallback added

☐ Team trained

☐ Notifications enabled

☐ Error handling tested

☐ Monitoring scheduled

☐ Success metrics defined

☐ Backup process available

✓ Ready to Automate

FINAL STEP

Ready for More Reliable Automation?

If your automation feels slow, unreliable, or overly complicated, a structured review can often reveal simple improvements that save time and reduce errors.

NEED A WORKFLOW REVIEW?

Let's find what's slowing your automation down.

We'll help identify bottlenecks, simplify your process, and recommend practical automation improvements tailored to your business.

[Book a Discovery Call](#) →



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