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AI ENABLEMENT PLAYBOOK SERIES

Working Smarter with AI & Automation

Mostly, it's about getting your time back.

PLAYBOOK 1 · START HERE

A ten-minute read for anyone wondering where to begin. No jargon, no hype, no homework.

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A note before you start

If you picked this up feeling a bit wary, maybe you've heard a lot of noise about AI and you're not sure what it means for you, maybe you don't think of yourself as a techie, maybe you're just tired of being told about the 'Next big thing', this playbook is written for you.

It's the shortest of the set and the least technical. There's nothing to install, nothing to learn, and no quiz at the end. The only thing it asks is that you look at your own working week a little differently by the time you finish.

Read it in ten minutes with a cup of tea. That's all.

Section 1: This isn't about the technology

Something that isn't said often enough: this is not actually about AI.

It's about your time, time that your company is spending on those forty minutes every Friday you spend copying numbers from one system into a spreadsheet. It's about the report you build every month that you suspect nobody reads. It's about retyping the same answer to the same question for the fifteenth time. It's about the bit of your job you dread; not because it's hard, but because it's dull and fiddly and eats time you'd rather spend on the work that actually matters. We all have them, we just don't necessarily notice them as opportunities.

That's what this is about. Getting that time back.

AI and automation are just tools. The newest ones in a very old toolbox. People have been finding smarter ways to work since the first person thought, "There must be a better way to do this." A checklist is a productivity tool. A spreadsheet formula is a form of automation. That filing system that means you can actually find things is streamlining. None of it is new. The tools have just got better and hopefully, more accessible.

So when you read "AI", don't picture a robot coming for your job. Picture a slightly clever assistant who's brilliant at the boring bits and happy to do them so you don't have to.

The one idea in this playbook: You almost certainly do things every week that a machine should be doing instead. Finding even one of them is a win.

Section 2: Let's deal with the worries

You might have some reservations. Great, that means you're thinking already. Let's go through the common ones.

“Will this replace me?”

It's the big one, so let's not dodge it.

AI is very good at tasks and very bad at jobs. Your job is a bundle of dozens of things. You excel at judgment, relationships, context, knowing why something matters, spotting when something's off, and caring about the outcome. AI can take a few of the dull tasks off your plate. It cannot do your job, because your job is mostly the things that aren't tasks.

The people who do well with this hand off the boring 20% so they can be better at the important 80%. Think of it as delegating the bits you never wanted to do anyway.

The real risk is pretending it doesn't exist. The most futureproof thing you can do is get comfortable with it on your own terms, at your own pace. Which is exactly what this is for.

“I'm not technical enough”

You don't need to be. Genuinely.

If you can write an email describing what you want, you can use modern AI tools.

There's no code, no jargon required, no special training, not at first at least. The skill is being able to say clearly what you're trying to achieve, and you already do that every day.

The people getting the most out of these tools are very often not the technical ones. They're the ones who know their own work best and can spot the bits worth handing off. That's you.

“I don't have time to learn another thing”

Fair. Everyone's busy, and “here's another system to learn” is the last thing anyone needs.

But notice the trap: the reason you don't have time is partly because of the repetitive stuff this could take off your plate. Twenty minutes spent setting something up once can save you twenty minutes every week for the rest of the year.

And the entry cost is much lower than you think. We're not talking about a training course. We're talking about trying one small thing. The kind of thing you can do in a coffee break. Section 6 is all about starting small.

“Isn't it all just hype?”

Some of it, yes. There's a lot of noise, a lot of overpromising, and a lot of people trying to sell you things. Healthy scepticism is sensible.

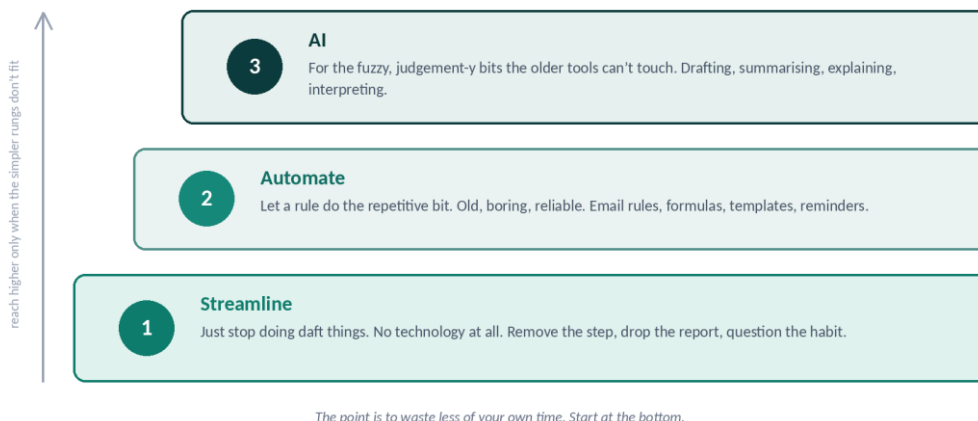
But strip away the hype and there's something real underneath: these tools are good at certain things. Summarising, drafting, sorting, explaining, handling the repetitive. You don't have to believe the grand claims to get value from the boring, practical reality.

Ignore the noise. Focus on whether it saves you time on a real task. That's the only test that matters.

Section 3: Three rungs on a ladder

A reframe that takes the fear out of all this.

“Working smarter” isn't one thing, and it definitely isn't only AI. It's a ladder with three rungs, and the bottom two have been around forever and frighten nobody. Well, maybe automation does, but the tools are so easy to work with these days that they aren't quite as black boxy.



Rung 1: Streamline (just stop doing daft things)

The simplest rung, and often the most powerful. No technology at all. Just noticing something wasteful and stopping it.

- The weekly report nobody reads. Stop making it.
- The form with a field nobody uses. Remove it.
- The approval step for a thing that never gets rejected. Drop it. (As long as there's no risk, of course)
- The meeting that could've been a message. Having worked in the NHS, this is a huge one.

Streamlining is just asking “why do we do it this way?” and being brave enough to change the answer. You don’t need permission from technology to do this. You need permission to question the habit.

Rung 2: Automate (let a rule or a workflow do the repetitive bit)

The middle rung. Rigid, boring, reliable. You set up a rule or the flow once, and a tool does the repetitive thing forever after.

- An email rule that files messages into the right folder automatically.
- A spreadsheet that does the sum the moment you type the number.
- A workflow that sends the reminder so you don’t have to remember to.
- A template that fills in the standard bits for you.

This is the technology your organisation already has to some degree, doing the things it’s quietly been doing for years. Nobody’s scared of an email rule. Automation is just email rules, all the way up to pre-defined processes that work off a trigger towards an objective. It’s all just a process, a flow.

Rung 3: AI (for the fuzzy, judgement-y bits)

The newest rung. AI earns its place on the tasks that the older tools couldn’t touch. The ones that need a bit of language, a bit of interpretation, a bit of “it depends.”

- Turning your rough notes into a tidy first draft.
- Summarising a long document into the three things that matter.
- Explaining something complicated in plain English.
- Drafting a reply you’ll then check and adjust.

AI earns its place here. But notice it’s the top rung, the one you reach for when the simpler rungs don’t fit. Most of the time, the answer to “how do I save time on this?” is further down the ladder than you’d expect.

The point of the ladder: the goal is to stop wasting your own time. Sometimes the answer is AI. Often it’s simpler, cheaper, and less scary than that. Start at the bottom and only climb when you need to.

Section 4: Looking at your own week differently

Now the only bit of homework, and it's gentle. For one week, just notice. You're not changing anything yet; you're spotting candidates.

Keep an eye out for the four tell-tale signs that a task is a candidate for working smarter:

1. The repetitive

Anything you do the same way, again and again. Weekly, daily, every time a certain thing happens. Repetition is the number-one signal. If you've done it more than ten times, it's worth a look.

2. The rules-based

Anything where the steps don't really change. "If it's this, do that." "Always send it to these people." "Copy this into there." If you could write down the rules for a temp to follow, a machine can probably follow them too.

3. The copy-paste

Any time you're moving information from one place to another by hand. Spreadsheet to email. System to form. Document to document. Copy-paste is almost always a sign that something could be done for you.

4. The dread

The task you put off, the bit of the week you sigh about. Dread is data. It's usually pointing at something repetitive, fiddly, or pointless, exactly the things worth fixing.

A simple exercise: at the end of each day this week, jot down one thing you did that felt repetitive, fiddly, or pointless. Don't try to fix it. Just write it down. By Friday, you'll have a list, and one or two items on it will jump out as obvious candidates. We'll talk about how to address them later.

You don't need to find a big transformation. You're looking for one small, annoying thing. That's the whole exercise.

Section 5: What “good” looks like

Real examples, deliberately unglamorous. None of these is impressive. All of them gave someone their time back. That’s the point, working smarter is rarely dramatic.

Streamlining: the report nobody read

Priya built a detailed status report every Monday morning. Took her an hour. One day, she asked the three people to whom it went what they actually used it for. Two never opened it. The third only wanted one number from it. She replaced the hour-long report with a one-line message. **An hour a week, gone with no technology at all. I have seen this time and time again.**

Automating: the inbox that sorts itself

Tom was drowning in automated notifications cluttering his inbox. He spent ten minutes setting up a few email rules, notifications to one folder, anything from his manager flagged, and newsletters tucked away for Friday. **Ten minutes once, calmer inbox forever.** No AI. Just rules that have existed for twenty years.

Automating: the data that stopped being retyped

Yusuf copied figures from one system into a spreadsheet every Friday. A colleague showed him how to get the spreadsheet to pull them in automatically. The first setup took an afternoon with a bit of help. **Now Friday’s forty-minute job takes thirty seconds.**

A little AI: the notes that write themselves up

Sarah always took messy bullet-point notes in meetings, then spent twenty minutes turning them into something readable to send round. Now she pastes the bullets into an approved AI tool and asks for a tidy summary, then checks and tweaks it. **Twenty minutes down to five** and she still reads every word before it goes out, because the judgement is still hers.

Notice the pattern: small, dull, real. Nobody here transformed their job. They each clawed back a slice of time from something they never enjoyed doing. Do that a few times and it adds up to a genuinely better week.

Section 6: Start ridiculously small

Here’s your permission slip: **you do not have to transform anything.**

Forget “digital transformation.” Forget becoming an AI expert. Forget the grand vision. The only goal is to reclaim twenty minutes from one annoying task. That’s it. That’s a complete, legitimate, brilliant win.

The one-thing-this-week approach

1. Look at the list you made in Section 4 (or just think of the most annoying repetitive thing you did this week).
2. Pick the smallest, most obvious one. Not the biggest problem, the easiest one.
3. Ask one question: “Could this be streamlined, automated, or handed to an AI?”
4. Try the simplest version. Ask a colleague who might know. Have a go with an approved tool. Or just stop doing the pointless bit. Or reach out to me on LinkedIn; I can probably help you.
5. If it works, lovely, you’ve got twenty minutes back. If it doesn’t, you’ve lost nothing and learned something.

That’s the whole method. One small thing. Low stakes. No commitment.

Why small is the right size

Big changes fail. They’re risky, they need sign-off, they take forever, and when they go wrong, people notice. Small changes succeed quietly. They build your confidence. And confidence is the thing that actually matters here. Once you’ve had one small win, the next one feels easy, and the fear quietly disappears.

You’re just trying one small thing. The rest follows on its own.

This week’s challenge: find one repetitive task and make it even slightly easier. That’s it. If you do just that, this playbook has done its job.

Section 7: You’re not alone

The last worry worth dissolving: asking for help, or admitting you don’t know something, is a weakness. It absolutely isn’t.

“Is there a better way to do this?” is one of the most valuable questions anyone can ask at work. The people who ask it are exactly the people every organisation needs more of. Curiosity about your own work is a strength.

Where to turn

- A colleague who seems to have a knack for this. Every team has one. They’re almost always delighted to be asked.
- Your AI or innovation lead, if your organisation has one. Their whole job is helping people work smarter. You’re not bothering them; you’re the reason they exist.
- Your IT or digital team for the automation and streamlining questions.

- Whatever learning resources your organisation offers, lunch-and-learns, drop-ins, internal guides.

(Fill in the actual names and contacts for your organisation here. It makes all the difference when someone's ready to ask.)

If you take one thing from all this

You don't have to be afraid of any of this, and you don't have to dive into all of it. You just have to be a little bit curious about your own time and willing to try one small thing.

The tools will keep changing. The newest ones happen to be AI. But the question underneath stays the same as it's always been: Is there a better way to do this?

Ask it often. Start small. You've got this.

Where to go next

You don't need anything else to begin. Not another document, not permission, not a grand plan.

Pick one thing this week. The most repetitive, fiddly, or dull task on your plate. Don't automate it, don't fix it. Just notice it, and ask the question this whole playbook comes down to: is there a better way to do this?

Sometimes the answer is a rule. Sometimes it's a template, or a quiet word with whoever asked for the report. Sometimes it's AI. Often it's just stopping. Any of those counts. You've already done the hard part, which was looking.

That's the work. Everything else is detail.

More playbooks are on the way. Use-Case Adoption, Build & Develop, Governance & Safe Use, Project Delivery. When they land, they'll pick up exactly where this one leaves off, but none of them is a prerequisite. This is the only one you need to start. Good luck!