

Automation Readiness Checklist

10 steps to prepare for your next automation project



Automation can improve productivity, quality, and cost-efficiency – especially with the right plan in place. Use this checklist to assess your readiness, align your team, and reduce risk.

1. Map your processes

- Identify the manufacturing processes you plan to automate
- Document workflows, pain points, and bottlenecks
- Eliminate non-value-adding steps where possible

2. Gather your data

- Collect accurate data on cycle times, throughput, and error rates
- Define KPIs to measure automation success
- Track costs (labour, downtime, scrap) consistently

3. Build the business case

- Estimate the ROI for automating each process
- Prioritize high-impact, low-cost opportunities for early wins

4. Check system compatibility

- Review infrastructure (IT, floor layout, power supply) for automation readiness
- Confirm new tech will integrate with existing equipment
- Identify required changes to layout, process, or design

5. Evaluate vendors and technologies

- Define criteria to evaluate automation technologies and vendors
- Consider scalability and future-proofing of the solution
- Assess open vs. proprietary system compatibility

Ready to take the next step?

Eclipse Automation provides advanced engineering services and solutions across the entire automation value chain. Connect with our experts who can help assess, design, and build your next automation project:

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6. Plan for workforce impact

- Identify how automation may affect roles and responsibilities
- Determine if reskilling or upskilling will be required
- Communicate early and clearly to gain buy-in

7. Simulate and test

- Use a digital twin or simulation to validate the system
- Run performance tests before full deployment
- Develop a pilot or phased rollout plan

8. Mitigate risk

- Identify potential failure points or implementation risks
- Create contingency plans for downtime or disruptions

9. Align on timeline and roles

- Build a detailed roadmap with key milestones
- Assign responsibilities across teams and vendors

10. Plan for long-term support

- Confirm post-launch vendor support and services
- Ensure tools and training are available for your team
- Define how success will be measured after go-live



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