

Recurring Report Automation Blueprint

How to turn emails, meeting notes, spreadsheets, and templates into review-ready monthly reports.

EXAMPLE BUILD

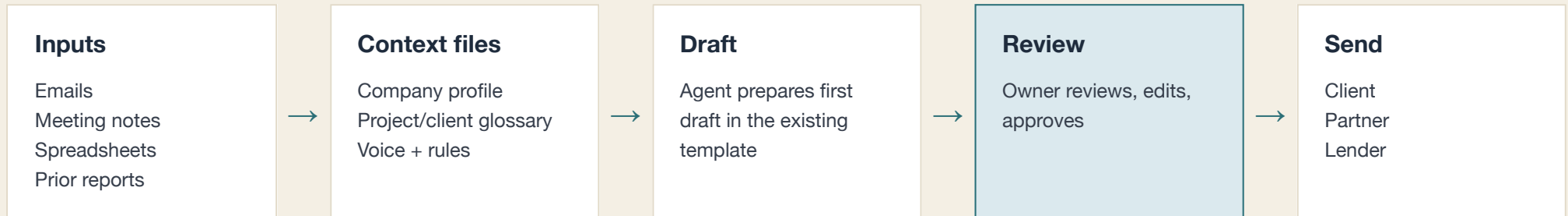
Melbourne developer

8 active JVs | 4–5 hrs/report

32–40 hrs/month returned

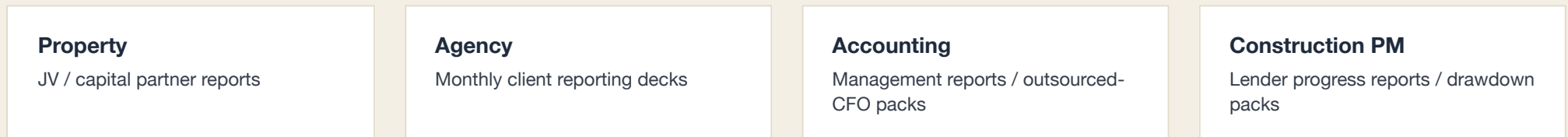
The pattern **N stakeholders × recurring cycle × same template × different messy inputs every time**

SYSTEM DIAGRAM



The automation is not the approval point. It prepares the draft. The owner still decides what leaves the business.

SAME PATTERN, DIFFERENT BUSINESS LANGUAGE



Is your report worth automating?

Score each item 0, 1, or 2. The goal is not to prove that AI can help. The goal is to decide whether the workflow is structured enough for a fixed-fee build.

1	Same report format every cycle 0 = changes every time 1 = mostly same structure	2 = same template every month	/2
2	Same source material every cycle 0 = sources are random 1 = partly consistent	2 = same source types: email, notes, spreadsheet, CRM, prior report	/2
3	Clear human approval point 0 = nobody owns final review 1 = review happens informally	2 = one person signs off before it goes out	/2
4	Manual prep time is painful 0 = under 1 hour/month 1 = 1–3 hours/month	2 = 3+ hours/month	/2
5	Mistakes matter 0 = low-stakes internal note 1 = useful but not critical	2 = goes to clients, partners, lenders, investors, or management	/2

0–3

Do not automate yet. Map the workflow first.

4–6

Possible, but scope needs care.

7–10

Strong candidate for a fixed-fee build.

If you score 7+: send the report name, who receives it, where the source material lives, and the current template. I will tell you whether a first version can be built in a day.

Prefer to talk it through? Book a free 15-minute fit call: calendly.com/southseaautomation/15min