

Automation Philosophy

Process First, Technology Second

My approach to technology and automation is pragmatic, foundational, and human-centric. I prioritize fixing underlying processes before implementing technology, and I emphasize simplicity, ownership, and reliability over chasing flashy trends. The core tenets of my philosophy:

- 1 Process first, technology second.** Technology is a tool to support a well-defined process, not a starting point. AI doesn't fix broken processes — it just automates chaos faster. The focus is on right-sized solutions built on a solid foundation.
- 2 Demystification and accessibility.** Automation should be approachable for everyone, starting from the basics and backed by practical advice. The path in is incremental — begin by mapping repetitive, low-judgment tasks with simple tools like forms and flowcharts.
- 3 Pragmatism and cost-consciousness.** A “Simplify First” approach: simple rules and deterministic code often provide better value and reliability than expensive or complex AI. The biggest wins usually come from the “boring” administrative bottlenecks.
- 4 Addressing root causes.** Rather than using AI to manage symptoms like email overload, this approach targets the source — using intake forms and structured systems to prevent problems from occurring in the first place.
- 5 Client control and ownership.** Solutions are typically built directly in a client’s Office 365 environment, so clients retain complete control over their data and own the solution outright with a one-time payment, avoiding ongoing vendor lock-in.

In short, automation is not a quick technological fix, but a practical journey of building better, simpler, and more reliable systems that empower people to focus on high-value, strategic work.

