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4 essential steps to achieve strategic automation at scale

Organizations that review and adjust their processes and cultural behaviors get more value faster from their automation investment and establish a solid foundation for advanced use cases such as AIOps and agentic automation. Explore the essential steps for an optimized automation journey in this checklist.

1   Identify initial use cases

The automation journey begins by identifying simple, manageable use cases that deliver measurable value. Focus within 1 to 2 teams and find time-consuming processes that represent clear automation opportunities.

Key activities for getting started:

▶ Launch an automation center of excellence (CoE) to establish a cross-functional foundation with standards, governance, and best practices in place.

▶ Identify a few manual, Day 2 tasks—such as restarting services, audit reporting, or decommissioning unused cloud resources—that could serve as simple candidates for automation.

▶ Start with automation use cases that directly support your organization's prioritized business objectives.

▶ Document plans in a centralized repository and establish internal communication channels. Codify processes using Ansible® Playbooks so they can become the foundation for future innovation.

2   Scale automation to more IT domains

Once you are successfully automating within a domain, you can start to extend automation across teams, drawing upon lessons learned during your initial pilot. This step is important as many organizations fail to progress to enterprise-wide automation.

Key activities include:

▶ Pilot generative AI to create automation content that can accelerate onboarding and increase developer productivity.

▶ Evaluate opportunities for orchestration and event-driven scenarios within 1 or 2 domains. Event-driven automation acts as a foundation for future cross-domain workflows and agentic automation.

▶ Implement role-based access control (RBAC) and establish policy-based controls.

▶ Measure return on investment (ROI) and other performance metrics, and share that data widely to build greater support from leadership and enthusiasm from users.

3   Accelerate automation adoption

Evolve your CoE into a formal community of practice (CoP) to extend knowledge across your organization. Your CoP will become the primary means of educating and onboarding new teams while opening up opportunities for cross-team collaboration.

Activities for acceleration:

▶ Use your CoP to democratize access to automation across your enterprise. Obtain executive-level sponsorship to build an environment of collaboration and success.

▸ Extend automation to more teams, and work towards building event-driven, orchestrated scenarios that span infrastructure, networks, cloud, etc.

▸ Pilot the use of AI for IT operations. Start with lower-risk entry points such as incident triage and ticket enrichment to demonstrate value without affecting production environments.

4 Federate, refine, and optimize

Once a culture of automation has been widely established, focus on continuous optimization and adaptation. Make an automation-first mindset systemic within your IT organization.

Key activities:

▸ Offer developers and other end users access to self-service automation to reduce common friction points and increase productivity.

▸ Integrate automation into continuous integration/continuous delivery (CI/CD) pipelines to simplify your developer experience.

▸ Continue to audit your IT operations, looking for areas of manual effort and inefficiency that can be automated while unlocking additional capacity.

▸ Consolidate redundant automation tools to limit costs and reduce cognitive load and context switching among users.

Advance your automation maturity

Even with the right technology, success with automation is not guaranteed. Organizations that excel at change management can accelerate their journey to enterprise automation.

Read our guide to automation maturity

Consult with Red Hat experts

Red Hat® Services can help organizations onboard new teams, implement best practices, and make automation a strategic enabler.

Connect with Red Hat experts to solve your IT challenges with automation

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