# Process Automation Opportunity Scanner

## Identifying AI Automation Candidates

Process Automation Opportunity Scanner is your strategic compass for navigating the transformation from manual to autonomous execution. This worksheet helps you systematically identify which business processes are ripe for AI automation, moving beyond gut instinct to data-driven decision making.

### Why?

The biggest mistake organizations make isn't choosing the wrong technology. It's choosing the wrong processes to automate first. This scanner prevents that costly misstep by providing a structured framework to evaluate automation opportunities through multiple lenses: business impact, technical feasibility, and strategic alignment.

### How to Use the Worksheet?

Work through each section methodically with your cross-functional team. Don't rush - the insights you gather here will shape your automation roadmap for months to come. Plan for 2-3 working sessions to complete this thoroughly.

### Who Should Participate:

- Process owners and subject matter experts
- IT and data teams
- Finance representatives
- Change management leaders

# 1: Process Inventory & Baseline Assessment

# Process Identification Matrix

Complete this table for each business process you're considering for automation:

| Process Name | Department | Frequency | Current Staff Time (hrs/week) | Annual Volume | Process Owner | Last Modified |
|---|---|---|---|---|---|---|
| *Example: Invoice Processing* | *Finance* | *Daily* | *40* | *12,000* | *Jane Smith* | *Q2 2024* |

# Process Characteristics Assessment

For each process identified above, rate the following characteristics (1-5 scale, where 5 is highest):

| Process Name | Rule-Based Decisions | Data Availability | Process Variability | Documentation Quality | Stakeholder Buy-in |
|---|---|---|---|---|---|
| | | | | | |

**Rating Guidelines:**

- **Rule-Based Decisions (1-5):** How much of this process follows clear, consistent rules vs. requires human judgment?
- **Data Availability (1-5):** How accessible and clean is the data this process requires?
- **Process Variability (1-5):** How standardized is this process across different scenarios? (Lower variability = higher score)
- **Documentation Quality (1-5):** How well-documented are the current process steps and business rules?
- **Stakeholder Buy-in (1-5):** How receptive are process owners and users to automation?

# 2: Business Impact Assessment

## Impact Scoring Framework

**Instructions:** For each process, score the potential business impact across these dimensions (1-5 scale):

| Process Name | Cost Reduction Potential | Quality Improvement | Speed Enhancement | Compliance Impact | Customer Experience | Strategic Value |
|---|---|---|---|---|---|---|
|  |  |  |  |  |  |  |

## Impact Calculation Worksheet

**Process Name:** _____

**Current State Analysis:**

- Annual labor cost: $_____
- Error rate: _____%
- Average processing time: _____ (hours/days)
- Customer complaints related to this process: _____ per month
- Compliance incidents: _____ per year

**Projected Automation Impact:**

- Expected labor cost reduction: _____%
- Expected error rate reduction: _____%
- Expected speed improvement: _____%
- Expected customer satisfaction improvement: _____ (1-10 scale)

**Quantified Annual Benefits:**

- Cost savings: $_____
- Quality improvement value: $_____
- Time savings value: $_____

- Risk mitigation value: $_____
- **Total Annual Benefit: $_____**

# 3: Technical Feasibility Analysis

## Automation Readiness Assessment

Rate each process on technical factors (1-5 scale, where 5 is most favorable for automation):

| Process Name | Data Structure | System Integration | Exception Handling | Process Stability | Technical Complexity |
|---|---|---|---|---|---|

**Assessment Criteria:**

- **Data Structure:** How structured and consistent is the input data?
- **System Integration:** How easily can we integrate with existing systems?
- **Exception Handling:** How well-defined are exception scenarios and handling procedures?
- **Process Stability:** How frequently does this process change?
- **Technical Complexity:** How technically challenging would automation be?

## Implementation Complexity Matrix

**High-Level Effort Estimation:**

| Process Name | Development Effort | Infrastructure Changes | Change Management | Training Requirements | Total Complexity Score |
|---|---|---|---|---|---|
| | Low/Med/High | Low/Med/High | Low/Med/High | Low/Med/High | ___/20 |
| | Low/Med/High | Low/Med/High | Low/Med/High | Low/Med/High | ___/20 |
| | Low/Med/High | Low/Med/High | Low/Med/High | Low/Med/High | ___/20 |

**Scoring:** Low=1, Medium=3, High=5. Total possible score is 20 per process.

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# 4: Strategic Alignment & Priority Matrix

## Strategic Fit Assessment

**Company Strategic Priorities:** (List your top 3-5 strategic initiatives)

1. _____
2. _____
3. _____
4. _____
5. _____

**Alignment Scoring:** Rate how well each process automation aligns with strategic priorities (1-5 scale):

| Proces s Name | Strategi c Priority 1 | Strategi c Priority 2 | Strategi c Priority 3 | Strategi c Priority 4 | Strategi c Priority 5 | Average Alignmen t |
|---|---|---|---|---|---|---|

**Process Placement:**

## Quick Wins (High Impact, Low Complexity):

- Process: _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ (Impact Score: _ _ _, Complexity Score: _ _ _)
- Process: _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ (Impact Score: _ _ _, Complexity Score: _ _ _)

## Major Projects (High Impact, High Complexity):

- Process: _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ (Impact Score: _ _ _, Complexity Score: _ _ _)

- Process: _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ (Impact Score: _ _ _, Complexity Score: _ _ _)

### Fill-ins (Low Impact, Low Complexity):

- Process: _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ (Impact Score: _ _ _, Complexity Score: _ _ _)
- Process: _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ (Impact Score: _ _ _, Complexity Score: _ _ _)

### Questionable (Low Impact, High Complexity):

- Process: _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ (Impact Score: _ _ _, Complexity Score: _ _ _)
- Process: _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ (Impact Score: _ _ _, Complexity Score: _ _ _)

# 5: ROI Estimation Framework

## Investment Requirements

For your top 3 process candidates, complete this investment analysis:

**Process #1:** _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _

## Implementation Costs:

- Software licensing: $_ _ _ _ _ _ _ _ _ _ _ _ _
- Development/customization: $_ _ _ _ _ _ _ _ _ _ _ _ _
- Infrastructure: $_ _ _ _ _ _ _ _ _ _ _ _ _
- Training: $_ _ _ _ _ _ _ _ _ _ _ _ _
- Change management: $_ _ _ _ _ _ _ _ _ _ _ _ _
- **Total Implementation Cost: $_ _ _ _ _ _ _ _ _ _ _ _ _**

## Ongoing Costs (Annual):

- Maintenance: $_ _ _ _ _ _ _ _ _ _ _ _ _
- Support: $_ _ _ _ _ _ _ _ _ _ _ _ _

- Upgrades: $_____
- **Total Annual Operating Cost: $_____**

## ROI Calculation:

- Annual Benefit (from Section 2): $_____
- Net Annual Benefit: $_____ (Annual Benefit - Annual Operating Cost)
- Payback Period: _____ months (Implementation Cost ÷ Monthly Net Benefit)
- 3-Year ROI: _____%

## Risk Assessment

**Implementation Risks:** (Rate 1-5, where 5 is highest risk)

| Process Name | Technical Risk | Change Resistance | Vendor Risk | Regulatory Risk | Business Continuity Risk | Total Risk Score |
|---|---|---|---|---|---|---|
| | | | | | | |

# 6: Implementation Roadmap

## Priority Ranking

Based on your analysis, rank your processes in implementation priority:

| Rank | Process Name | Quick Wins Score | Business Impact | ROI % | Risk Level | Recommended Timeline |
|---|---|---|---|---|---|---|
| 1 | | | | | | |
| 2 | | | | | | |
| 3 | | | | | | |
| 4 | | | | | | |
| 5 | | | | | | |

## Success Metrics

**For Each Priority Process, Define:**

**Process:** _____

- **Efficiency Metric:** _____
  (baseline: _____, target: _____)
- **Quality Metric:** _____
  (baseline: _____, target: _____)
- **Cost Metric:** _____ (baseline:
  _____, target: _____)
- **User Satisfaction:** _____
  (baseline: _____, target: _____)

# 7: Action Planning

## Next Steps Checklist

## Immediate Actions (Next 30 Days):

- Present findings to executive stakeholders
- Secure budget approval for priority processes
- Form a cross-functional implementation team
- Begin detailed process documentation for #1 priority
- Evaluate potential vendor/solution providers
- Create a change management communication plan

## Short-term Actions (Next 90 Days):

- Complete proof-of-concept for highest priority process
- Finalize vendor selection and contracts
- Begin detailed technical design
- Launch change management initiatives
- Establish success metrics and monitoring approach
- Plan phased rollout approach

## Resource Requirements

**Team Composition Needed:**

- Project Manager: _____ (FTE allocation)
- Business Analysts: _____ (FTE allocation)
- Technical Developers: _____ (FTE allocation)
- Change Management: _____ (FTE allocation)
- Process SMEs: _____ (FTE allocation)

**Budget Requirements:**

- Year 1 Investment: $_____
- Year 2 Investment: $_____
- Year 3 Investment: $_____

# Summary & Recommendations

**Key Insights from This Analysis:**

1. **Top Automation Candidate:**

   _____
   - **Why:**

     _____
     ____
2. **Biggest Opportunity:** $_____ annual value potential
   - **Process:**

     _____
3. **Recommended Starting Point:**

   _____
   - **Rationale:**

     _____
4. **Critical Success Factors:**
   - _____
   - _____
   - _____

**Next Review Date:** _____ (Recommend quarterly updates)

*This worksheet is designed to evolve with your organization's automation maturity. Revisit and refine your process selection criteria as you gain experience and expand your AI capabilities.*