

Ready to Automate?

IDENTIFY THE BEST PROCESSES FOR AUTOMATION

RPA scorecards are easy to use templates for determining your process automation readiness. The automation scale will vary from organization to organization based on the needs of the team/s involved and what data you need to collect as part of the scoring process, but consider this scorecard your starting point. Use it to determine which criteria matter most when assessing your business processes for automation readiness. Click to select your response for each question, then see where your process leans on the automation scale at the end. To assess a new process, simply rinse and repeat. Happy automating!

Process Frequency
How often does your team need the process completed?

MONTHLY WEEKLY DAILY AD HOC

Transaction Volume
How many transactions are processed each year?

<5K 10K 100K 1M+

Organizational Impact
How many users will you impact if the process is automated?

ONE USER SMALL TEAM ENTIRE DEPT. ENTIRE ORG.

Time per Transaction
How long does the transaction take?

10+ MINS 5-10 MINS 2-5 MINS <1 MIN

Systems and Screens
How many systems and screens does this process affect?

11-15+ 6-10 2-5 0-1

Input Data
How is your input data structured?

UNSTRUCTURED STRUCTURED
Email body, PDF Database, Excel

Business Rules
How complex are the business rules?

HUMAN REQUIRED COMPLEX RULES SIMPLE YES/NO NO RULES

Process Continuity
How often does the process change?

FREQUENTLY CHANGES STABLE WITHOUT CHANGES

Automation Readiness Results
Zoom out to see where your process leans on the automation scale.

Fair Good Great Excellent

These final criteria are also important when considering your process automation readiness

System and Data Reliability
How reliable are your systems and data? (select multiple)

ERROR PRONE UNRELIABLE DATA MANY VARIATIONS SYSTEM OUTAGES

Why this process
What are your priorities for automating this process? (select multiple)

HIGH LEVEL OF ACCURACY ADDITIONAL GROWTH VALUE ADDED WORK