

# US AI Automation Pilot ROI Methodology

How to estimate payback before a full rollout using conservative assumptions

## Direct answer: how to estimate ROI for a pilot

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Estimate pilot ROI by measuring current manual hours, error/rework rates, and throughput delays for one workflow, then apply conservative automation savings (20-40%) and compare against the pilot cost over 90-180 days. Start with one process, not a full transformation model.

## What to measure before any automation build

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1. Monthly process volume (requests, forms, invoices, tickets, etc.)
2. Average handling time per item (minutes)
3. Rework rate and escalation rate
4. Time-to-completion / cycle time delays
5. Who must approve or review output
6. Current software stack (M365, Teams, Outlook, CRM, ERP, ticketing, file stores)

### Method rule

Use observed numbers from the last 4-8 weeks, not best-case guesses.

## Pilot ROI formula (conservative)

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Use this baseline equation for a 30-60 day pilot and 90-180 day payback review.

Metric	Formula	Notes
Monthly hours saved	Volume x Time per item x % reduction	Use 20-40% reduction for first pilot estimates
Monthly labor value (USD)	Hours saved x loaded hourly cost	Include wages, benefits, payroll tax, and reviewer time
Rework savings	Reduced errors x avg rework time x hourly cost	Only include measurable rework
Pilot ROI	$(90-180 \text{ day value} - \text{pilot cost}) / \text{pilot cost}$	Review after pilot stabilizes

## Example workflow model: intake and triage

Input	US example	Conservative automation assumption
Monthly submissions	1,200 intake emails/forms	Use recent 30-day average
Current handling time	7 minutes each	Measure across 20-30 samples
Automation savings	30% handling-time reduction	Pilot target for classification + routing
Human review	100% on exceptions, sampled on routine cases	Keep approvals in place during pilot
Outcome to track	Faster routing + fewer missed follow-ups across locations	Tie to service-level target

## What a 30-60 day pilot should include

### Week 1: process and baseline

- Workflow map, exceptions, and approvals documented
- Success metrics agreed (hours, turnaround, error rate)
- Security/compliance and data handling constraints confirmed

### Weeks 2-4: build and test

- Automation inside existing tools where possible
- Human-in-the-loop checkpoints for all high-risk actions
- Exception handling and rollback path documented

### Weeks 5-8: supervised rollout

- Limited-volume rollout and performance review
- Metric review against baseline
- Scale / stop / redesign decision based on evidence

## What not to do when calculating pilot ROI

- Do not assume 80-100% automation on the first pilot
- Do not count "strategic value" if you cannot explain the math
- Do not ignore reviewer time and exception handling
- Do not compare pilot cost to a full-year fantasy scenario

## Next step

Use this methodology to score one workflow, then book a pilot scoping session. If you want a faster start, use our [What to Automate First scorecard](#) before your consultation. US teams should also define who signs off on exception handling during the pilot.