What to Automate First Scorecard

Practical worksheet for selecting one AI automation pilot workflow (US draft)

(WORKSHEET)　30-MINUTE TEAM SESSION　DRAFT V5 (REVIEW ONLY)

How To Use This

- Pick **5 candidate workflows**
- Apply the **Hard Exclusion Gate**
- Score each workflow on 7 criteria (1-5)
- Apply **Pilot Blockers** and score bands
- Choose 1 winner + 1 backup

Choose the most *pilotable* workflow, not the most strategic one.

Hard Exclusion Gate (Pass/Fail)

If any answer is **No**, do not choose this workflow first.

- Named process owner?
- Measurable outcome available?
- Humans can review exceptions?
- No core-system replacement required first?
- Enough sample data/cases to test safely?

Scoring Rule (1-5)

- **1** = poor fit for first pilot
- **3** = workable but needs care
- **5** = strong fit for first pilot
- Use **2/4** only if clearly between anchors

> **Important:** Risk is a pilot safety score, not business importance.

30-Minute Workshop Flow

1. **Prep (5m):** list 8-10 recurring workflows + owners
2. **Narrow (5m):** pick top 5 and remove gate failures
3. **Score (15m):** use anchor table + evidence, not opinion
4. **Decide (5m):** apply blockers + score bands, choose winner

Scoring Anchors (Use These, Not Gut Feel)

Criterion	Score 1	Score 3	Score 5
Volume	Few times/month	Weekly / batch	Daily / high volume
Repetition	Different each time	Some repeat steps, many variations	Consistent repeat steps
Rule Clarity	Heavy judgment / unclear rules	Partial rules, common exceptions	Clear rules, known exceptions
Data Quality	Messy/incomplete inputs	Usable, regular cleanup	Consistent structured inputs
Risk	High legal/safety impact	Moderate impact, approvals needed	Low impact if supervised
Payback Visibility	Hard to measure	Some indicators, partly indirect	Easy to measure (hours/ errors/cycle time/backlog)
Adoption Readiness	Resistance / unclear ownership	Mixed support	Team wants relief now

What Counts As One Workflow?

- Clear trigger (email/form/request/document)
- Clear output (routed/filed/approved/updated/notified)
- Spans 1-2 teams, not the whole business
- Can be mapped on one page

Good: Intake triage and routing. **Bad:** "Finance transformation".

Worksheet (Score 5 Candidate Workflows)

Workflow	Owner	Vol	Rep	Rules	Data	Risk	Payback	Adopt	Total	Blocker?	Decision
Example: Intake triage	Ops Mgr	5	4	4	3	3	5	4	28	No	Pilot
1.											
2.											
3.											
4.											
5.											

Decision Handoff (Complete Before Build)

1. Workflow owner
2. Primary pilot metric
3. Human approval points
4. Exception owner
5. Pilot scope (in / out)

Common Mistakes

- Choosing the most strategic workflow instead of the most pilotable
- Ignoring risk because pain is high
- Scoring a department, not a workflow
- No owner or no measurable outcome
- Treating pilot like a full transformation

Pilot Decision Rules (Apply After Scoring)

Blockers (override total):

- `Risk <= 2`
- `Rule Clarity <= 2`
- `Payback Visibility <= 2`

Score bands:

- **28-35**: Strong first pilot candidate
- **24-27**: Viable (confirm owner + controls)
- **20-23**: Prep first (mapping/data/ownership)
- **0-19**: Poor first pilot candidate

Tie-breaker: higher Payback Visibility, then lower Risk, then clearer owner.

Worked Example (Scoring Summary)

Workflow: Intake triage and routing (shared inbox + forms)
- Volume = **5** (daily across channels)
- Repetition = **4** (mostly repeat pattern)
- Rule Clarity = **4** (rules exist; exceptions known)
- Data Quality = **3** (some cleanup required)
- Risk = **3** (human review for exceptions)
- Payback Visibility = **5** (time + SLA measurable)
- Adoption Readiness = **4** (team wants relief)

Total: 28/35   **Blockers:** None

Why This Wins
- High frequency + measurable payback
- Moderate risk with clear human supervision
- Visible pain the team already wants to fix

Scoring Notes Template (Use for the Winner)

Workflow name: _____

Owner: _____

Primary metric: _____

Current baseline: _____

Why this scored well:

_____

_____

Key pilot risks / controls:

_____

_____

What stays human-approved during pilot:

_____

Next Step (After Choosing Winner)

Estimate ROI, define supervision controls, and scope a 30-60 day pilot with one owner and one primary metric.

Need a faster answer? Run our AI workflow assessment: sg1consulting.us/process-discovery