# AI & AUTOMATION OPPORTUNITY ASSESSMENT

# AI & Automation Opportunity Assessment

## 00. WHO IS THIS FOR?

Anyone tasked with understanding how AI might drive automation wins.

The assessment offers a step-by-step playbook to spot, score, and plan high-value automations that deliver real RoI.

## 0. BEFORE YOU START

**Align with Company Strategy**

Embarking on an automation journey without clear strategic alignment often leads to unsuccessful outcomes. The foundational step in this methodology is ensuring all automation initiatives directly support your organization's broader strategic objectives. Misalignment is a common reason for automation program failure; initiatives lacking clear top-down endorsement or a strong connection to overall business goals typically face resource constraints, resistance, or result in automating processes that deliver limited strategic value. Cost reduction is often a primary driver of automation—and that’s valid—but first, ensure you fully understand how your Automation Assessment aligns with overall company strategy.

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## 1. PROCESS DISCOVERY AND LONGLISTING

**Objective:** Identify Candidate Processes

Begin by inventorying business processes across relevant departments.

Engage teams directly to identify routine tasks or pain points. For each candidate process:

- Document detailed steps, systems used, volume, cycle times, and individuals involved.
- Capture baseline metrics (average handling time, error rates, weekly FTE hours).
- Clearly define each process's business objective and the value it provides.

Mapping the current (as-is) process creates a foundational understanding, enabling visualization of potential improvements and automation opportunities.

**Output:** Initial longlist of identified processes with essential details.

**Further reading:** See Appendix 1.

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## 2. DETAILED ANALYSIS AND RANKING

**Objective:** Rank processes through deeper analysis and staff interviews.

**AS-IS Analysis:**

- Cost per day / week / year
- Task volume
- Variance in volume (daily, seasonal)
- Number of staff involved
- Number/type of systems
- Complexity level (High/Med/Low)
- Exception frequency/type

**TO-BE Analysis:**

- Complexity of to-be process (High/Med/Low)
- Cost to automate
- Risk (regulatory, reputational, financial, operational)
- Governance requirements (audit trails, oversight)
- Time to automate
- Change management needs (training, emotional considerations)
- Operating costs post-automation
- Estimated annual savings

**Output:** Ranked list of processes prioritized for automation based on clear business rationale.

**Further reading on ranking:** See Appendix 2.

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## 3. PROCESS DESIGN & COST and PROCESS MAPPING

**Objective:** Develop detailed To-Be designs and document current (As-Is) processes clearly.

**To-Be Process Design:**

For top-ranked candidates, create detailed designs showing exactly how processes will function post-automation. Clarify automated versus manual steps, identify technical and operational requirements (such as digital forms, exception handling), and verify feasibility (e.g., API availability, AI capability). Validate designs through quick proofs-of-concept or pilots as needed. Involve business and IT teams to ensure the design is practical and has stakeholder buy-in. Update ROI calculations based on detailed designs.

**To-Be Process Cost:**

Once you have a more detailed understanding of the to-be process design, you should be able to engage with suppliers to work out rough estimates of costs.

**As-Is Business Process Mapping:**

Thoroughly document existing workflows, including steps, roles, decision points, dependencies, bottlenecks, and exceptions. Clear visual or descriptive formats help stakeholders understand current inefficiencies, establishing a baseline against which future improvements and automation results can be measured.

**Further reading on technology selection:** See Appendix 3.

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## NEXT STEPS

You should now have a ranked list of target processes.

You should also have process designs for your top ranked candidates together with rough cost estimates.

You are now ready to engage with senior management to create a roadmap toward implementation.

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## APPENDIX 1: PROCESS DISCOVERY METHODS

- Top-down Analysis: Review strategic units and core functions (finance, HR, operations) to pinpoint mission-critical processes (e.g., procure-to-pay, order-to-cash).
- Bottom-up Ideation: Engage employees directly via workshops, surveys, and interviews to uncover pain points suitable for automation. Ask: "What routine bottlenecks could automation alleviate?" Frontline staff often identify valuable opportunities.
- Data-driven Discovery: Analyze existing documentation, historical metrics, system logs to identify high-volume, error-prone, or lengthy-cycle processes.
- Technology-led Identification: Leverage advances in AI, particularly LLMs, to automate previously complex qualitative analysis, content creation, or data extraction from documents and emails.

## APPENDIX 2: PROCESS RANKING APPROACHES

- Value vs. Complexity Matrix: Plot processes on value (Y-axis) and complexity (X-axis). High-value, low-complexity processes become high-priority quick wins; low-value, high-complexity processes are deprioritized.
- READY Criteria Checklist: Quickly filter candidates using questions:
    - Repeated regularly?
    - Easy/Expensive enough to justify automation?
    - Action-based (sequence of steps)?
    - Dependent significantly on manual effort?

Processes failing these checks may be set aside early, saving detailed analysis efforts.

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## APPENDIX 3: AUTOMATION TECHNOLOGY SELECTION

For prioritized processes, choose suitable automation technologies:

- Large Language Models (LLMs) / Generative AI: Ideal for categorization, summarization, content creation, decision support, and data extraction from unstructured text.
- Agentic AI: Combines LLMs with external tools to handle complex tasks beyond text manipulation.
- Chatbots / Virtual Assistants: Good for straightforward interactions, FAQs, simple transactions, and scheduling.
- Voice Automation: Provides natural conversational interfaces, significantly reducing costs associated with traditional call-center operations.
- Robotic Process Automation (RPA): Ideal for repetitive, rules-based tasks involving structured data and stable legacy systems.