[Skip to content](https://chatgpt.com/c/6882b600-ae18-800c-9b84-8ae47608f50d#main)

## **Chat history**

##### **You said:**

There is an automation group being created in our projects in wells Fargo.

Where we pool the ideas across various teams and kinda formate and channelize and proritize them wrt their impact in operational,time saving,cost cutting interms of resourcesand requires some controls aswell while it's going live .

So what are all the checks list and metrics and categorisation etc.i can follow

###### **ChatGPT said:**

That sounds like a strategic automation governance initiative. For such a setup—especially in a large financial institution like Wells Fargo—clear structure, controls, and value metrics are essential. Here's a comprehensive framework you can follow:

## **✅ Automation Governance Checklist**

### **1. Intake & Idea Assessment**

* Idea submission template (problem statement, current process, expected outcome)
* Categorization (e.g., Ops, Risk, Compliance, IT, Finance, etc.)
* Feasibility check (automation readiness, process standardization, data availability)
* Impact estimation (time saved, error reduction, SLA improvement)
* Duplication check (ensure it doesn't overlap with existing automation)

### **2. Evaluation & Prioritization Criteria**

* Business impact (High/Medium/Low)
* Automation ROI (quick wins vs long-term value)
* Manual effort saved (FTE hours)
* Complexity level (Low/Medium/High)
* Risk reduction potential
* Compliance/safety implications
* Dependency analysis (tech, infra, approvals)

### **3. Development Readiness**

* Access & permissions for dev environments
* Clear test data
* Process documentation availability
* Technology fit (RPA, Python, VBA, AI/ML, etc.)
* Resource allocation (developer + SME)

### **4. Controls & Governance**

* Version control & audit trail
* Exception handling design
* Security & access compliance checks
* Fallback plan/manual override
* Data privacy & PII handling review
* Change request process defined

### **5. Testing & UAT**

* Unit testing & peer reviews
* UAT sign-off by business stakeholders
* Test case documentation
* Performance/load testing (if needed)

### **6. Deployment & Go-Live**

* Production deployment checklist
* Cutover plan (if replacing existing flow)
* Rollback plan defined
* Communication to stakeholders
* Training (if end-users are involved)

### **7. Post-Go-Live Monitoring**

* KPIs defined and tracked
* Error/exception logs monitored
* Performance metrics tracked
* Business benefits validated
* Quarterly/Monthly review cadence

## **📊 Metrics to Track**

| **Metric** | **Description** |
| --- | --- |
| FTE hours saved | Manual hours eliminated |
| Cycle time reduction | Time saved per process |
| Error rate improvement | Decrease in manual errors |
| Process volume automated | No. of transactions handled |
| ROI | Benefits vs implementation cost |
| Uptime/Availability | Stability of automation |
| User satisfaction | Survey-based feedback |
| Automation adoption rate | % of process automated vs total candidates |

## **🗂️ Categorization Buckets**

### **By Process Type**

* Repetitive Manual Tasks
* Data Entry/Validation
* Reporting/MI Generation
* Reconciliation
* Approvals & Workflow

### **By Tool/Tech**

* RPA (e.g., Automation Anywhere, UiPath)
* Alteryx / ETL Tools
* Python / Scripts
* Excel Macros
* ML/NLP/AI

### **By Impact**

* Quick Wins (2–4 weeks)
* Strategic/Transformational (3+ months)
* Regulatory Compliance Focused
* Risk/Control Enhancing

Would you like this structured into a shareable slide or Excel template for stakeholder meetings?

##### **You said:**

in this process i was assisnged to articulate and present in ppt about specifically on assessment of the idea and weightage matrix etc

###### **ChatGPT said:**

Great! Since you're tasked with articulating and presenting the idea assessment and weightage matrix, your focus should be on how ideas are evaluated, what dimensions are considered, and how prioritization is made.

Here’s a suggested PowerPoint structure and content for your part of the presentation:

### **🔷 Slide 1: Title Slide**

"Automation Idea Assessment Framework & Prioritization Matrix"  
*Subtitle: WCDIR Automation Governance Initiative*Presented by: [Your Name]

### **🔷 Slide 2: Purpose of Idea Assessment**

* To ensure high-impact and feasible automation ideas are selected.
* To drive standardization in evaluating submissions.
* To prioritize ideas based on business value, feasibility, and risk.

### **🔷 Slide 3: Idea Assessment Flow**

Diagram or flowchart with these steps:

1. Idea Intake
2. Evaluation against criteria
3. Scoring via Weightage Matrix
4. Prioritization
5. Governance Committee Review

### **🔷 Slide 4: Evaluation Criteria**

| **Dimension** | **Description** |
| --- | --- |
| Business Impact | Time/effort savings, cost reduction |
| Feasibility | Availability of stable inputs/process |
| Complexity | Integration needs, process exceptions |
| Compliance & Risk | Control effectiveness, regulatory value |
| Reusability | Can be scaled across teams |
| Dependencies | Tech, people, tools |
| Strategic Fit | Alignment with org goals |

### **🔷 Slide 5: Sample Weightage Matrix**

| **Criteria** | **Weight (%)** | **Score (1–5)** | **Weighted Score** |
| --- | --- | --- | --- |
| Business Impact | 30% | 4 | 1.2 |
| Feasibility | 20% | 3 | 0.6 |
| Complexity | 15% | 2 | 0.3 |
| Risk Reduction | 15% | 5 | 0.75 |
| Reusability | 10% | 4 | 0.4 |
| Strategic Alignment | 10% | 5 | 0.5 |
| Total | 100% |  | 3.75 / 5 |

🟢 > 3.5 = High Priority  
🟡 2.5–3.5 = Medium  
🔴 < 2.5 = Low

### **🔷 Slide 6: Visual Prioritization Grid (Optional)**

A 2x2 Matrix:

* X-axis: Feasibility (Low to High)
* Y-axis: Business Impact (Low to High)
* Plot automation ideas accordingly

📌 Helps visually categorize:

* Quick Wins
* Strategic Projects
* Low Priority
* Complex/Low ROI

### **🔷 Slide 7: Example – Idea Assessment Snapshot**

Use a real (or sample) idea from your domain.

Example: Auto-scheduling Reports

| **Criteria** | **Score** |
| --- | --- |
| Business Impact | 4 |
| Feasibility | 5 |
| Complexity | 2 |
| Risk Reduction | 3 |
| Reusability | 4 |
| Strategic Fit | 5 |

Result: Weighted Score = 4.1 → High Priority

### **🔷 Slide 8: Governance Touchpoints**

* All ideas with scores > 3.5 go to governance for final review.
* Mediums go into backlog.
* Low scores: documented for revisit only if inputs/processes evolve.

### **🔷 Slide 9: Summary / Takeaways**

* A structured matrix ensures objectivity and repeatability.
* Promotes transparency in selection.
* Aligns tech effort with business value.

If you want, I can generate a sample deck in PowerPoint format or even provide editable slide content (in text/table form) for direct copy-paste into your template. Would you like that?

##### **You said:**

pls elobare wrt below process assigned to me

in this process i was assisnged to articulate and present in ppt about specifically on assessment of the idea and weightage matrix etc

###### **ChatGPT said:**

Thanks for clarifying. Since you're assigned to articulate and present the "assessment of the idea and weightage matrix", here’s a more detailed and structured breakdown you can use to build your PowerPoint presentation and explain it confidently:

## **🎯 Your Objective (In Simple Words)**

To explain how automation ideas are evaluated, what criteria are considered, how we score and prioritize them using a weightage matrix, and how that supports objective decision-making.

## **📊 SECTION-WISE EXPLANATION (for your PPT)**

### **✅ 1. Why Do We Need an Idea Assessment Framework?**

Purpose:

* To filter and select high-impact, feasible, and valuable automation ideas.
* Ensure limited resources are used on the right use cases.
* Promote transparency in selection and reduce subjective bias.

📌 *Slide Title Suggestion:* “Why Assess Automation Ideas?”

### **✅ 2. What is the Assessment Process?**

Steps:

1. Idea Submission – From various teams
2. Preliminary Review – For relevance and duplication
3. Detailed Evaluation – Using fixed criteria
4. Scoring & Weightage Matrix – To assign a score
5. Prioritization – Based on total score (High/Medium/Low)
6. Governance Review – Final decision to build or park

📌 *Slide Title Suggestion:* “Idea Assessment – Process Flow”

You can visualize this with a simple flowchart or process arrows.

### **✅ 3. What Are the Evaluation Criteria?**

Each idea is evaluated across a set of defined dimensions:

| **Criteria** | **What it Means** |
| --- | --- |
| Business Impact | Time saved, cost saved, FTE reduction |
| Feasibility | Ease of implementation – is process stable and digital? |
| Complexity | Integration, exceptions, or manual interventions involved |
| Risk Reduction | Does it eliminate control gaps or compliance risks? |
| Reusability | Can it be reused in other teams/units? |
| Strategic Alignment | Does it align with our org-level goals or roadmap? |

📌 *Slide Title Suggestion:* “Evaluation Dimensions Explained”

### **✅ 4. Weightage Matrix – The Scoring Method**

Every criterion is given a weight based on its importance. Each idea is scored from 1–5 on each criterion.

#### **Example Weightage Table:**

| **Criteria** | **Weight (%)** | **Score (1-5)** | **Weighted Score** |
| --- | --- | --- | --- |
| Business Impact | 30% | 5 | 1.5 |
| Feasibility | 25% | 4 | 1.0 |
| Complexity | 15% | 2 | 0.3 |
| Risk Reduction | 15% | 3 | 0.45 |
| Strategic Alignment | 15% | 4 | 0.6 |
| Total | 100% |  | 3.85 / 5 |

Score interpretation:

* 🔵 >3.5 – High Priority
* 🟡 2.5–3.5 – Medium Priority
* 🔴 <2.5 – Low Priority

📌 *Slide Title Suggestion:* “Weightage-Based Prioritization Matrix”

### **✅ 5. Example Assessment Case (Optional but Strong)**

Choose a realistic example like:

Use Case: Automating Monthly SLA Report Generation  
Apply the scoring and show its final weighted score.

📌 *Slide Title Suggestion:* “Sample Use Case – Scoring Walkthrough”

### **✅ 6. Benefits of This Model**

* ✅ Objective and fair decision-making
* ✅ Helps in aligning tech efforts with business strategy
* ✅ Promotes faster governance approvals
* ✅ Easy to track & revisit backlog items later

📌 *Slide Title Suggestion:* “Why This Model Works”

## **🔚 Final Slide: Summary / Conclusion**

* A well-structured assessment helps us pick the right automation ideas.
* Using a weighted matrix, we ensure value, feasibility, and scalability.
* This approach supports a more governed and efficient automation program.

## **🛠️ Optional Add-ons for Your PPT**

* Color-coded scoring table
* Process flow graphic
* Visual Prioritization Grid (2x2 quadrant):  
  X = Feasibility, Y = Impact

If you want, I can give you:

1. A PowerPoint slide outline
2. Or the actual text content to copy-paste into your slides

Let me know your preference?

##### **You said:**

how is weighed score calculated

###### **ChatGPT said:**

Great question!

### **✅ How Weighted Score Is Calculated:**

The weighted score is calculated by multiplying:

Score (1 to 5) × Weight (as a percentage)  
and then summing all weighted values.

### **🔢 Formula:**

For each criterion:

Weighted Score = (Score × Weight%)  
Total Weighted Score = Sum of all individual weighted scores

### **🧮 Example:**

Let's say you are evaluating an idea based on 5 criteria:

| **Criteria** | **Weight** | **Score (1–5)** | **Weighted Score** |
| --- | --- | --- | --- |
| Business Impact | 30% | 5 | 5 × 0.30 = 1.50 |
| Feasibility | 25% | 4 | 4 × 0.25 = 1.00 |
| Complexity | 15% | 2 | 2 × 0.15 = 0.30 |
| Risk Reduction | 15% | 3 | 3 × 0.15 = 0.45 |
| Strategic Alignment | 15% | 4 | 4 × 0.15 = 0.60 |
| Total | 100% |  | = 3.85 |

### **🎯 Final Score:**

* 3.85 out of 5

### **🟢 Score Interpretation (You Can Define These):**

* 4.0–5.0 → Top Priority
* 3.0–3.9 → Medium Priority
* <3.0 → Low/Backlog

Would you like me to give you a template Excel sheet or editable table for PPT with formulas filled in?

##### **You said:**

then how score os determined

###### **ChatGPT said:**

Excellent — you're asking the right questions.  
Let’s break it down:

## **✅ How Is the "Score" (1 to 5) Determined for Each Criterion?**

The score is a subjective rating based on predefined guidelines for each criterion. Typically rated on a scale of 1 (lowest) to 5 (highest).

### **🔹 1. Business Impact – Scoring Guide**

| **Score** | **Meaning** |
| --- | --- |
| 5 | >10 FTE hours saved weekly, direct cost reduction, SLA critical |
| 4 | 5–10 FTE hours saved, cost impact visible |
| 3 | 2–4 hours saved, productivity improvement |
| 2 | Minor time saving |
| 1 | Negligible or unclear impact |

### **🔹 2. Feasibility – Scoring Guide**

| **Score** | **Meaning** |
| --- | --- |
| 5 | Process is 100% digital, rule-based, no manual steps |
| 4 | Minor manual exceptions |
| 3 | Few gaps in digital readiness |
| 2 | Multiple dependencies (manual, unclear process) |
| 1 | Not feasible to automate currently |

### **🔹 3. Complexity – Scoring Guide**

*Note: This is reverse logic – higher score = less complex*

| **Score** | **Meaning** |
| --- | --- |
| 5 | Simple, no integrations, repeatable |
| 4 | Some logic but manageable |
| 3 | Involves system dependencies |
| 2 | Cross-platform / external API needed |
| 1 | High risk, unstable process, very complex |

### **🔹 4. Risk Reduction / Compliance Benefit**

| **Score** | **Meaning** |
| --- | --- |
| 5 | Eliminates significant risk/control gaps |
| 4 | Helps meet regulatory/ audit needs |
| 3 | Provides consistency and traceability |
| 2 | Slight improvement in control |
| 1 | No noticeable impact on risk/compliance |

### **🔹 5. Strategic Alignment**

| **Score** | **Meaning** |
| --- | --- |
| 5 | Directly supports key business strategy |
| 4 | Aligns with major department goal |
| 3 | Useful but not a strategic priority |
| 2 | Side benefit or non-core use case |
| 1 | No alignment or unclear purpose |

## **📌 Final Tip:**

You can keep these scoring guidelines in a backup slide or appendix of your PPT — to support governance decisions and answer stakeholder queries.

Would you like a ready-made scorecard template (Excel or PPT table) that includes these scoring definitions?

Messages beyond this point are only visible to you

##### **You said:**

can you ppt related this assessment

###### **ChatGPT said:**

Yes! Below is a ready-to-use PowerPoint presentation outline for your assigned topic: "Automation Idea Assessment & Weightage Matrix". You can copy this into PowerPoint or let me know if you'd like a downloadable .pptx file (I can generate that too).

—

🎯 Title: Automation Idea Assessment & Weightage Matrix  
📝 Subtitle: WCDIR Automation Governance  
👤 Presented by: [Your Name]

Slide 1: Introduction

* Purpose of this presentation
* Why idea assessment and prioritization are essential
* How weighted scoring supports objective decision-making

—

Slide 2: Automation Idea Assessment – Process Overview

Visual flowchart or bullets:

1. Idea Submission
2. Initial Screening
3. Evaluation Against Key Criteria
4. Scoring Using Weightage Matrix
5. Governance Review and Prioritization

—

Slide 3: Evaluation Dimensions

| **Criteria** | **Description** |
| --- | --- |
| Business Impact | Time/cost savings, efficiency |
| Feasibility | Technical & process readiness |
| Complexity | Ease of automation |
| Risk/Compliance Benefit | Control, audit, or regulatory value |
| Strategic Alignment | Relevance to business goals |
| Reusability | Potential to scale or reuse |

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Slide 4: Scoring Method

* Each criterion is scored from 1 (lowest) to 5 (highest)
* Clear scoring guidelines help standardize assessments
* Scores reflect value, readiness, and simplicity

—

Slide 5: Example Scoring Guidelines (Business Impact)

| **Score** | **Interpretation** |
| --- | --- |
| 5 | >10 hours saved weekly, high ROI |
| 4 | 5–10 hours saved |
| 3 | 2–4 hours saved |
| 2 | Minor time/cost benefit |
| 1 | Minimal or unclear business impact |

(Similar slides can be repeated for Feasibility, Complexity, etc.)

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Slide 6: Weightage Matrix Explained

| **Criteria** | **Weight %** | **Score (1–5)** | **Weighted Score** |
| --- | --- | --- | --- |
| Business Impact | 30% | 5 | 1.5 |
| Feasibility | 25% | 4 | 1.0 |
| Complexity | 15% | 3 | 0.45 |
| Risk Reduction | 15% | 3 | 0.45 |
| Strategic Alignment | 15% | 4 | 0.60 |
| Total | 100% |  | 4.0 / 5 |

Color-coded priority levels:

* Green: 3.5–5 → High
* Yellow: 2.5–3.49 → Medium
* Red: <2.5 → Low / Backlog

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Slide 7: Sample Idea Assessment

Example: Automating Monthly Reconciliation Emails

| **Criteria** | **Score** | **Reasoning** |
| --- | --- | --- |
| Business Impact | 4 | Saves 6 hours/month |
| Feasibility | 5 | Fully digital, structured emails |
| Complexity | 3 | Needs simple rules + scheduling |
| Risk Reduction | 4 | Eliminates manual control gap |
| Strategic Fit | 4 | Supports accuracy initiative |
| Weighted Score |  | 4.1 → High Priority |

—

Slide 8: Benefits of This Model

✅ Enables data-driven automation prioritization  
✅ Ensures fairness and repeatability  
✅ Speeds up governance decision-making  
✅ Helps focus on scalable, impactful use cases

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Slide 9: Summary

* A structured assessment ensures only high-value, feasible automation ideas are taken forward
* The weightage matrix simplifies and standardizes evaluation
* This model supports efficiency, control, and alignment with organizational goals

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Would you like me to generate the actual PowerPoint (.pptx) file for download with these slides formatted professionally?

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