

What to Automate First Scorecard

AU workflow prioritization framework for pilot selection

Direct answer: what should you automate first?

Start with a repetitive, rule-based workflow that happens weekly, causes visible admin drag, and has clear human approvals. The best first pilots are high-volume enough to show ROI, but low-risk enough to supervise.

Scoring criteria (1-5 each)

Criterion	Score 1	Score 5
Volume	Few times per month	Daily / high volume
Repetition	Handled differently each time	Consistent repeat steps
Rule clarity	Heavy judgment required	Clear decision rules
Data quality	Messy/incomplete inputs	Consistent structured inputs
Risk	High legal/safety impact	Low impact if supervised
Payback visibility	Hard to measure	Hours/errors/cycle time easy to measure
Adoption readiness	Strong team resistance	Team wants relief now

Scoring threshold

Prioritize workflows that score at least 24/35 and have an explicit owner.

Top pilot candidates by business type

Business type	Good first pilots	What to avoid first
Professional services	Client intake, document filing, engagement follow-ups	Advice drafting or complex client strategy decisions
Healthcare/admin teams	Referral intake, appointment reminders, document prep	Clinical decisions or unsupervised patient messaging
Trades/field services	Job intake, quote requests, scheduling confirmations	Unsupervised pricing or safety-critical decisions
Finance/back office	Invoice intake, reconciliation prep, approval routing	Unreviewed postings or BAS/compliance sign-off

Workflows to exclude from your first pilot

- Safety-critical actions, clinical decisions, or legal sign-off workflows
- Processes with no clear owner across teams or sites
- Workflows under active policy change (privacy/compliance controls still being set)
- Pilots that depend on replacing core systems before any value can be measured

How to run the scorecard in 30 minutes

1. List 10 recurring workflows that frustrate the team.
2. Pick the top 5 by volume or pain.
3. Score each workflow against the seven criteria.
4. Pick the highest score that still has a clear process owner.
5. Define one metric for hours, one for quality, one for turnaround time.

Example scorecard (intake triage)

Criterion	Score	Why
Volume	4	Requests arrive daily but batch volume varies
Repetition	5	Most requests follow a consistent intake path
Rule clarity	4	Triage rules exist with a small exception set
Data quality	3	Occasional missing fields require follow-up
Risk	3	Human review required for edge cases
Payback visibility	5	Turnaround time and rework are measurable
Adoption readiness	4	Admin team wants faster turnaround

Total: 28/35 (strong pilot candidate)

What to do after scoring

Use the winner to estimate ROI with our [pilot ROI methodology](#), then define the supervision model using the [compliance-aware automation design guide](#). For AU teams, document who approves exceptions before any pilot goes live.