

What to Automate First Scorecard

US 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, follow-up reminders	Advice drafting or complex client strategy decisions
Health care admin teams	Referral intake routing, appointment reminders, document prep	Clinical decisions or unsupervised patient messaging
Operations/manufacturing	Work order intake, exception alerts, report compilation	Autonomous production control
Finance/back office	Invoice intake, reconciliation prep, approvals routing	Unreviewed postings or 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 states
- Workflows under active policy change (privacy/security 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	5	New requests arrive daily across multiple channels
Repetition	4	Most submissions follow a standard pattern
Rule clarity	4	Routing rules exist with known exceptions
Data quality	3	Some free-text cleanup needed
Risk	3	Needs human approval for exceptions
Payback visibility	5	Handling time and SLA are measurable
Adoption readiness	4	Team wants backlog reduced

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 US teams, document who approves exceptions before any pilot goes live.