

Automation Scenario

Number:

We need to automate / streamline ...

Example: Resolution of customer complaints

(Activity / process to streamline) 

WHAT

to help ...

Example: Customer service agents, escalation managers

(Area / Role(s)) 

WHO

to ...

Example: achieve faster resolution of customer issues, improve satisfaction and reduce churn.

(Objective(s)) 

WHY

Characteristics

How complex is this activity or process? Very Simple Very complex	How variable and unpredictable are the next steps? Always Fixed Highly Variable
Why?	What changes?
How much human judgement is needed to decide next steps? Clear Rules Exist Reasoning needed	How much time or effort could be saved if automated? Not much Some A lot
What criteria are important?	Why?