

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?
1 (very simple) - 5 (very complex)

1 2 3 4 5

Very Simple

Very complex

Why?

How variable and unpredictable are next steps?

1 (always fixed) - 5 (highly variable / unpredictable)

1 2 3 4 5

Always Fixed

Highly Variable

What changes?

How much human judgement is needed to decide next steps?
1 (none: only clear rules) - 5 (a lot: only human reasoning)

1 2 3 4 5

Clear Rules

Reasoning

What decision criteria are important?

How much time / effort could be saved if automated?

1 (not much) - 5 (a lot)

1 2 3 4 5

Not much

A lot

Why?