Activity / process to streamline

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?