

ROBOTIC PROCESS AUTOMATION

Process Assessment Scorecard



This template can help your organization decide whether a process is a good candidate for RPA: Robotic Process Automation. Complete the form, including offering your assessment of where the process falls on a scale of 1 to 5 in the key characteristics listed.

Process Name	
Detailed Description of Process and why it is being considered for RPA	
Post-Automation Goals (ex. error reduction, FTE savings, time savings, increase capacity, etc.)	

PROCESS ATTRIBUTES	PROCESS RATING SCALE	SCORE (1 to 5)	ADDITIONAL NOTES / DETAILS
Primarily rules-based, or many exceptions requiring human judgment?	Rate your organization's process on a scale of 1 to 5 for this attribute. A score of 5 describes a process that follows strict rules that don't often require independent human judgment; a score of 1 describes a process that often needs human judgment.		
Manual and repetitive?	A score of 5 describes a process that is highly repetitive and manual; a score of 1 describes a process that is not often repetitive.		
Structured or unstructured data?	A score of 5 describes a process where most or all of the process's data is in a structured format (i.e. input is always formatted the same) and is easy to digitally analyze; a score of 1 describes a process where most process data is unstructured.		
Inputs are already digitized and readable?	A score of 5 describes a process where the process inputs are digitized and easily readable by computer systems (ex. database, desktop app, Internet, Excel, Word, e-mail, .PDF, etc.); a score of 1 describes a process where many inputs aren't digitized.		
High volume/high frequency process?	A score of 5 describes a process that is high volume or high frequency within the organization; a score of 1 describes a process that is low volume or low frequency.		
Mature and stable process, or one that frequently changes?	A score of 5 describes a mature process that has existed for a while within the organization and doesn't often change; a score of 1 describes a newer process or one that changes somewhat frequently.		
Current process error prone?	A score of 5 describes a process that is prone to human error; a score of 1 describes a process that experiences few errors.		
Employees' skills transferable?	A score of 5 describes a process where the talent and skills of employees who perform the work could be easily transferred to other tasks within the organization; a score of 1 describes a process where those employees' skills could not be easily transferred to another task.		
Measurable effects?	A score of 5 describes a process where the positive or negative effects of automation would be easily measurable in terms of time to complete a process, error rate, etc.; a score of 1 describes a process where effects would be difficult to measure.		
TOTAL SCORE			36+ Process is a good candidate for automation 27-35 Process might be a candidate for automation (consult LTA team) 0-26 Process unlikely to be a good current candidate for automation