

ASSESSMENT 02 · CLIENT CARE OPERATIONS

Automation Opportunity Matrix

Identify, compare and prioritize processes without mistaking a high score for permission to automate.

Prepared as an educational planning tool. It is not a certification, a legal opinion, or an assessment of a particular organization.

6

SCORING CRITERIA

-6 to 27

WEIGHTED SCORE RANGE

3

SCREENING LABELS

Purpose and method

List recurring workflows, establish the baseline, and score each on a 0–3 scale. The matching Excel workbook calculates weighted priorities automatically. The result supports discussion; it does not replace privacy, legal, accessibility, safety, or security review.

- 1 Inventory recurring workflows and their baseline (Section 01).
- 2 Score each candidate against the six criteria (Section 02).
- 3 Calculate the weighted opportunity score (Section 03), or use the companion Excel workbook.
- 4 Compare candidates, measure, apply the guardrails and record the next decision (Sections 04–07).

ASSESSMENT RECORD

TEAM / FUNCTION

PREPARED BY

DATE

Companion workbook: CCO_Automation_Opportunity_Matrix_V2.1.xlsx calculates the weighted score and screening label automatically.

SECTION 01

Process inventory

List recurring workflows and establish the baseline for each.

WORKFLOW / OWNER	CASES / MONTH	MANUAL MINUTES / CASE	MAIN EXCEPTION / RISK

SECTION 02

How to score an opportunity

Score each candidate on a 0–3 scale for each criterion. The weight shows how each criterion enters the weighted score in Section 03.

CRITERION	WEIGHT	0	1	2	3
Frequency	×2	rare	occasional	frequent	high volume
Rule clarity	×2	highly variable	some patterns	mostly repeatable	explicit, documented rules
Integration feasibility	×2	blocked	uncertain	technically workable	supported, tested interfaces
Data quality	×2	unreliable	mixed	usable	consistently reliable
Owner readiness	×1	no owner	provisional	designated	engaged and prepared
Risk exposure	–2	low consequence	manageable	sensitive	consequential or high-risk

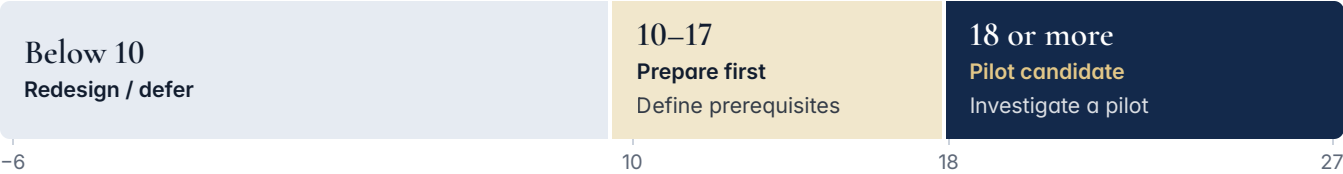
SECTION 03

Weighted opportunity score

WEIGHTED FORMULA

Score = 2×Frequency + 2×Rule clarity + 2×Integration feasibility + 2×Data quality + Owner readiness – 2×Risk exposure.

SCREENING LABELS FOR PLANNING



Possible range: -6 to 27. Screening labels for planning: 18 or more = Pilot candidate (investigate a pilot); 10–17 = Prepare first (define prerequisites); below 10 = Redesign / defer. These thresholds are illustrative and should never override hard constraints.

SECTION 04

Process comparison

Enter the 0–3 score for each criterion, then calculate the weighted score.

CANDIDATE	FREQ. ×2	RULES ×2	INTEG. ×2	DATA ×2	OWNER ×1	RISK –2	WEIGHTED SCORE –6 to 27	SCREENING LABEL
A:								
B:								
C:								
D:								
E:								

Column key: Freq. = Frequency · Rules = Rule clarity · Integ. = Integration feasibility · Data = Data quality · Owner = Owner readiness · Risk = Risk exposure. Screening label: Pilot candidate, Prepare first, or Redesign / defer.

SECTION 05

Baseline and post-pilot measurement

MEASURE	BEFORE	AFTER PILOT	INTERPRETATION
Median turnaround time			
Manual touches per case			
Exception / rework rate			
On-time closure rate			

SECTION 06

Pilot guardrails

- ☐ Choose a clearly bounded workflow with one accountable owner.
- ☐ Document permissions and minimize access to confidential information.
- ☐ Keep human approval where required; test missing information and service failures.
- ☐ Define rollback, support, and change-management responsibilities.
- ☐ Record actual outcomes; do not equate hours handled with guaranteed staffing savings.

SECTION 07

Next decision

- ☐ Map process first
- ☐ Improve without automation
- ☐ Small pilot
- ☐ Defer

OWNER

REASSESSMENT DATE

Research basis

- Microsoft Power Automate process-mining guidance
<https://learn.microsoft.com/en-us/power-automate/process-mining-overview>
- NIST AI RMF Playbook
<https://www.nist.gov/itl/ai-risk-management-framework/nist-ai-rmf-playbook>