

Workflow Automation Candidate Scorecard

Instructions

Use this workbook independently with the people who own and perform the work. Record evidence, assumptions, disagreements, and open questions. Do not force a universal answer or rely on invented benchmarks. Professional technical, legal, financial, security, accessibility, or operational assessment may be appropriate for complex, sensitive, regulated, or business-critical decisions.

Workflow facts

Prompt	Notes, evidence, owner, and next action
Trigger, completion, and owner	
Volume, roles, systems, and waits	
Manual touches and exceptions	
Failure impact and sensitive information	

Suitability

Prompt	Notes, evidence, owner, and next action
Rule clarity and input structure	
Source quality and process stability	
Supported interfaces and reversibility	
Testability and exception visibility	

Control needs

Prompt	Notes, evidence, owner, and next action
Approvals and human review	

Prompt	Notes, evidence, owner, and next action
Audit history and alerting	
Retry, override, and recovery	
Credential and access ownership	

Pilot decision

Prompt	Notes, evidence, owner, and next action
Baseline and intended change	
Cost categories and feasibility	
Success threshold and stop condition	
Review date and accountable owner	

This resource is educational and does not guarantee a result. Visit outlookintensified.com/resources/ for the accessible webpage and related guidance.