ROBOTIC PROCESS AUTOMATION — ASSESSMENT TEMPLATE

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 process in various characteristics.

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

PROCESS ATTRIBUTES	PROCESS RATING SCALE	SCORE of 1 to 5	ADDITIONAL NOTES
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 process that often needs human judgment.		
Manual and repetitive?	A score of 5 describes process a process that is highly repetitive and manual; a score of 1 describes 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 within a database 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; a score of 1 describes a process where many inputs aren't digitized.		

PROCESS ATTRIBUTES	RATING PROCESS	SCORE of 1 to 5	ADDITIONAL NOTES
High volume/high frequency process?	Rate your organization's process on a scale of 1 to 5 for this attribute. 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 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 **0-26** Process unlikely to be a good current candidate for automation		

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