

The AI Workflow Opportunity Scorecard

A practical 15-minute tool for finding the first AI workflow worth building.

THE DECISION

Start where value is visible, the work repeats, and people can review the result.

VALUE

REPEATABILITY

CONTROL

PRINT IT. SCORE THE WORK.

Choose one 30-day pilot.

NILASOFT.DEV

Software for the way work really happens.

BEFORE YOU SCORE

Do not automate the loudest problem.

01

Start with the workflow

Name the trigger, inputs, decisions, exceptions, and final handoff. A vague department-wide goal is too large to score.

02

Follow the repetition

High-frequency work creates more chances to save time, reduce rework, and learn from real use.

03

Keep review visible

The best first pilot has a clear human owner who can approve, correct, or stop the system.

04

Measure before building

Capture the current time, error rate, backlog, or conversion rate. Improvement needs a baseline.

FAST FILTER

If you cannot name the owner, baseline, review point, and failure response, the workflow is not ready for a pilot.

STEP 1

Build your workflow inventory.

List specific jobs, not broad functions. Good: 'turn emailed purchase orders into reviewed orders.' Too broad: 'automate sales.'

COMPANY / TEAM

DATE

FACILITATOR

#	WORKFLOW CANDIDATE	TRIGGER	CURRENT OWNER	PAIN TODAY
1				
2				
3				
4				
5				
6				

PROMPT

Where do people copy, chase, reconcile, retype, classify, summarize, or wait?

STEP 2

Score every candidate from 1 to 5.

Use evidence from the current workflow. A lower score is better only for risk and decision complexity; the worksheet reverses those two automatically.

F	Frequency How often does the workflow occur?	1 Rare	5 Daily or more
T	Time cost How much human time does it consume?	1 Minutes	5 Many hours
R	Rework How often do errors or exceptions repeat?	1 Almost never	5 Constantly
D	Data readiness Are usable examples and inputs available?	1 Unavailable	5 Clean and accessible
H	Human review Can a person clearly approve or correct output?	1 No clear owner	5 Clear owner and rules
I	Integration fit Can it connect to the systems involved?	1 Blocked	5 Simple and supported
C	Decision complexity How subjective or ambiguous are decisions?	1 Highly subjective	5 Rule-like
S	Sensitivity How harmful could a wrong answer be?	1 High stakes	5 Low stakes

OPPORTUNITY SCORE

$$F + T + R + D + H + I + C + S = / 40$$

For C and S, 5 means easier or safer.

STEP 3

Run the scorecard.

Score the six candidates from your inventory. Circle the strongest two, then test them against the decision rules below.

Candidate	F	T	R	D	H	I	C	S	TOTAL

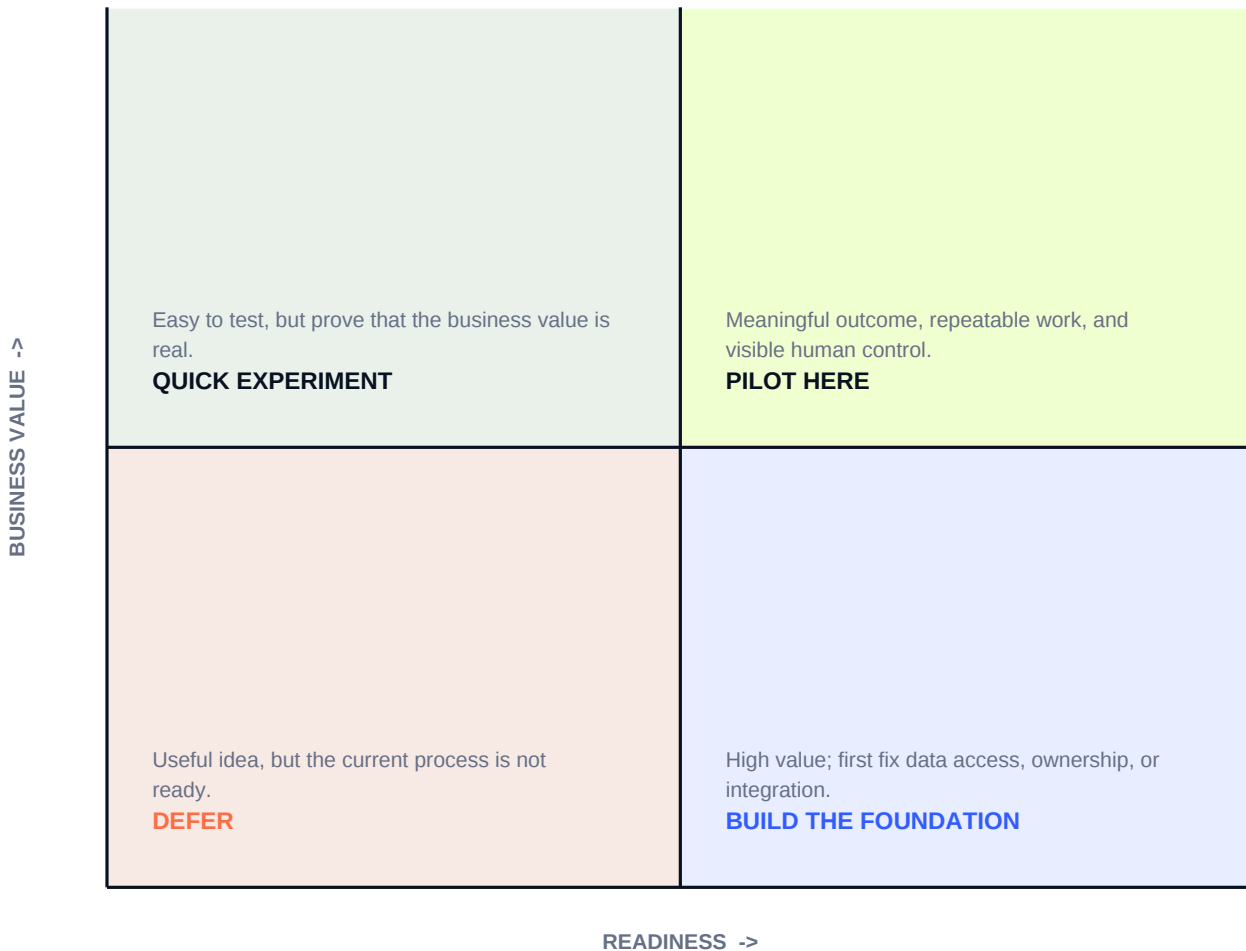
DECISION RULES

32-40	Strong pilot candidate	Validate the baseline and scope a 30-day test.
24-31	Promising, with a dependency	Identify the missing data, owner, rule, or integration.
16-23	Discovery before automation	Map the process and remove avoidable variation first.
8-15	Do not automate yet	The workflow is too rare, unclear, risky, or disconnected.

STEP 4

Choose value you can prove.

Use the score to narrow the field, then place the top candidates on this matrix. The best first pilot lives in the upper-right.



SELECTED PILOT

WHY THIS ONE

STEP 5

Frame a 30-day controlled pilot.

A pilot should answer a business question. Keep the scope small enough to observe, correct, and stop.

1 / BUSINESS OUTCOME

What improves if this works? Name one measurable outcome.

2 / BASELINE

What happens today? Capture time, volume, error, backlog, or conversion.

3 / IN SCOPE

Which trigger, inputs, decision, and output will the pilot handle?

4 / HUMAN CONTROL

Who reviews the output? What must always require approval?

5 / FAILURE RESPONSE

What happens when confidence is low, data is missing, or the system is wrong?

6 / GO / NO-GO RULE

What result earns expansion? What result pauses or ends the pilot?

THE PILOT CONTRACT

Owner

Start date

Review date

WORKED EXAMPLE

Invoice intake and exception review.

A practical example of turning a broad automation idea into one controlled workflow with measurable value.

WORKFLOW

Turn emailed vendor invoices into matched line items, then route only uncertain or changed items to a reviewer.



TOTAL 33 / 40 - STRONG PILOT CANDIDATE

30-DAY TEST

OUTCOME Cut manual entry time while keeping every uncertain match reviewable.

BASELINE 8 staff hours per week; 11% of invoices require rework.

SCOPE One vendor format, one inbox, one accounting-system destination.

HUMAN CONTROL Operations lead approves cost changes and matches below threshold.

READY TO PRESSURE-TEST YOUR TOP WORKFLOW?

Bring NilaSoft the stubborn part. We will help you define a useful first move.

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