

Automation Opportunity Finder

Identify high-value workflow automation and calculate ROI

1 Identify Automation Candidates

For each repetitive task your team performs, check which criteria apply:

- | | |
|--|-----------------------------------|
| <input type="checkbox"/> Does this task happen the same way every time? | Predictable = automatable |
| <input type="checkbox"/> Does it happen frequently (weekly or more)? | Higher frequency = faster payback |
| <input type="checkbox"/> Does it involve moving data between systems? | Integration tasks automate well |
| <input type="checkbox"/> Is it time-sensitive with deadline consequences? | Reduces missed deadline risk |
| <input type="checkbox"/> Does it require little judgment once initiated? | Rule-based = good fit |
| <input type="checkbox"/> Are errors common when done manually? | Automation improves accuracy |
| <input type="checkbox"/> Does it pull someone away from higher-value work? | Frees capacity for expertise |

Scoring: 5+ checks = strong candidate • 3-4 = consider if high-impact • <3 = probably not worth it

2 Calculate Current Time Cost

- | | | |
|--|-----------------|--------|
| A. Time per occurrence (minutes) | _____ | |
| B. Occurrences per week | _____ | |
| C. Weekly time cost ($A \times B \div 60$) | _____ | hrs/wk |
| D. Annual time cost ($C \times 50$ weeks) | _____ | hrs/yr |
| E. Fully-loaded hourly cost | _____ | \$ |
| F. Annual labor cost of this task ($D \times E$) | \$ _____ | |

3 Estimate Risk & Error Cost (Often Overlooked)

- | | | |
|---|-----------------|--|
| G. Errors or missed deadlines per year | _____ | |
| H. Average cost per error (rework, penalties, lost opportunity) | \$ _____ | |
| I. Annual risk cost ($G \times H$) | \$ _____ | |

4 Calculate ROI

J. Total annual benefit (F + I)	\$ _____
K. Estimated implementation cost	\$ _____
L. Annual maintenance cost	\$ _____
M. Net annual benefit (J – L)	\$ _____
N. Payback Period ($K \div M \times 12$)	_____ months

Decision Framework

- < 6 months** Strong candidate — prioritize this automation
- 6–12 months** Good candidate — proceed if capacity allows
- > 12 months** Marginal — find higher-impact opportunities first

Common High-Value Automation Targets

If you're not sure where to start:

- ☐ Insurance certificate expiration tracking and renewal requests
- ☐ Lease/contract key date extraction to tracking calendars
- ☐ Invoice data extraction and budget line matching
- ☐ Meeting action item extraction and follow-up tracking
- ☐ Estoppel/SNDA request generation and response tracking
- ☐ Document filing and naming convention enforcement
- ☐ Compliance deadline reminders (entity filings, covenant reporting)
- ☐ Vendor onboarding form → contract generation workflow

Ready to identify automation opportunities?

Book a 30-minute discovery call to discuss your workflows.

project-path.com

