

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 × B ÷ 60)	_____ hrs/wk
D. Annual time cost (C × 50 weeks)	_____ hrs/yr
E. Fully-loaded hourly cost	_____ \$
F. Annual labor cost of this task (D × 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 × 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 ÷ M × 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.

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