

AI Automation Screening Criteria

Eight questions that decide whether an automation idea is worth piloting now — or belongs in a later wave.

Most AI initiatives stall because ideas are scoped by enthusiasm rather than criteria. Score any proposed automation idea yes or no against these eight. The more "yes" answers, the stronger the case for a Phase 1 pilot.

The Eight Criteria

1	Rule-Based Logic. Can the decision be written as explicit if/then/else steps, with no subjective judgment?	Y / N
2	High Frequency / Volume. Does it run daily or weekly, or across a large number of transactions?	Y / N
3	Standardized Inputs. Are inputs structured and consistent — fixed formats, known fields — rather than free-form?	Y / N
4	Low Exception Rate. Are edge cases rare, and do they follow known, predictable patterns?	Y / N
5	Bounded, Reversible Risk. If it misfires, is the impact limited and easy to correct — not customer- or compliance-facing?	Y / N
6	Clear Success Metric. Can the win be measured — hours saved, error rate reduced, turnaround improved?	Y / N
7	Stable Process. Is the underlying process unlikely to change in the next 6–12 months?	Y / N
8	Accessible Data. Is the data available now, without a major integration lift?	Y / N

Scoring bands

6–8 yes: Strong Phase 1 automation candidate. Rule-based, provable, low risk — start here.

3–5 yes: Predictive or copilot wave. Real value, but it needs a model or a human in the loop, not a simple script. Sequence it after the quick wins.

0–2 yes: Park it. Blocked, unstable, or unmeasurable as scoped. Revisit when the process stabilizes or the data becomes accessible.

Guiding principle: favor small, provable wins over one large build. A single automated process with a clear before/after metric does more to restart a stalled initiative than a broad project that takes months to show results.

