Workflow Automation Planner



Purpose

This planner assists businesses in identifying repetitive, rule-based tasks that can be automated, detailing the potential tools for automation, and prioritizing projects based on potential return on investment.

Instructions

- Map current workflows that are manual and timeconsuming.
- 2. Identify automation tools that could be implemented.
- 3. Evaluate the benefits and ROI of automating each workflow.

Additional Notes

- Ensure that each automation initiative includes training for relevant staff.
- Review automation effectiveness annually to ensure they continue to meet business needs.

Workflow Automation Planner

Workflow Name	Description of Task	Automation Tool	Expected Benefits	Estimated ROI	Priority (1-10)
Example: Invoicing	Generate and send invoices to clients	RPA Software	Reduce errors, save time	30% cost saving	9