

Workflow automation ROI checklist

Build a decision model that separates staff capacity from realizable financial benefit.

Proposed workflow / period

Business-case owner

☐**Set one evaluation period**

Use the same horizon for benefits, implementation and recurring costs.

☐**Measure the baseline**

Record volume, active handling time, exceptions, errors and current cost.

☐**Calculate released capacity**

Volume x minutes saved / 60 = hours released; label the assumptions.

☐**Explain financial realization**

Identify avoided overtime, contractor cost or another evidenced cash effect.

☐**Include the full cost**

Add build, internal time, software, usage, training, review and maintenance.

☐**Avoid double-counting**

Check that labor, rework, productivity and revenue benefits do not overlap.

☐**Calculate ROI and payback**

$ROI = (\text{benefits} - \text{costs}) / \text{costs} \times 100$. Payback = upfront cost / positive monthly net benefit.

☐**Test uncertainty and ownership**

Compare conservative, expected and optimistic cases; assign post-launch measurement.

MAKE THE NEXT DECISION

Next decision: approve a scoped pilot, revise assumptions, or defer the investment. Payback is not meaningful when monthly net recurring benefit is zero or negative.

What changes in the budget or productive output when the time is released?