RPA Use Case Prioritisation Template

A Practical Guide for Building a Structured Automation Pipeline

1. Introduction: Purpose of the Template and the Automation Pipeline

The RPA Use Case Prioritisation Template provides a structured method for evaluating and selecting automation opportunities. Its primary purposes are:

- To ensure that automation efforts are focused on high-impact, feasible processes.
- To establish a transparent and repeatable process for assessing potential use cases.
- To support the development of an automation pipeline that aligns with organisational goals and delivers measurable value.

By implementing this template, organisations can avoid the pitfalls of random, uncoordinated automation and instead scale RPA initiatives effectively.

1.1 Why Prioritisation Is Critical for Scaling RPA

Without clear prioritisation, RPA programmes risk becoming fragmented and inefficient. Prioritisation ensures that resources are allocated to the most valuable opportunities, enabling organisations to:

- Maximise return on investment (ROI) by automating processes with the greatest impact.
- Maintain momentum and demonstrate early wins to secure stakeholder buy-in.

- Build a scalable pipeline of automation projects, reducing the risk of bottlenecks and duplicated effort.

1.2 Risks of Random, Uncoordinated Automation

Random automation-where use cases are selected without a structured framework-can result in:

- Automating low-value or non-standard processes that do not align with business strategy.
- Overlooking opportunities in critical business areas due to lack of visibility.
- Resource wastage and poor integration with existing systems.
- Difficulty in measuring success and demonstrating value to the organisation.

1.3 Benefits of a Structured Prioritisation Approach

A well-defined prioritisation framework delivers several advantages:

- Transparency: Stakeholders understand how and why decisions are made.
- Consistency: Each use case is evaluated against the same criteria, ensuring fairness.
- Alignment: Automation efforts support wider business objectives and strategies.
- Efficiency: Resources are deployed where they will have the most significant effect.

1.4 Example Scenario

Consider two departments proposing automation projects:

- The finance team suggests automating invoice processing, which is high-volume and time-consuming.
- The HR team proposes automating onboarding emails, which are sporadic and already partially templated.

A structured prioritisation template would help identify the finance use case as a higher priority, given its potential for greater efficiency gains and impact on business operations.

Use Case Intake Form

The Use Case Intake Form is a key component of the prioritisation process. It captures essential information about each proposed automation opportunity, enabling objective comparison and informed decision-making. Below is a detailed explanation of each field, including practical examples.

Field 1: Use Case

- **Description:** A brief title or summary of the process or task proposed for automation.
- **Purpose:** To quickly identify and categorise the opportunity.
- **Example:** "Automated Invoice Processing"

Field 2: Business Area

- **Description:** The department, function, or team where the process is performed.
- **Purpose:** Helps assess the strategic relevance and ensures representation across the organisation.
- **Example:** "Finance Department"

Field 3: Pain Point

- **Description:** A concise statement of the main challenge or inefficiency the process presents.

- **Purpose:** Identifies why automation is needed and what problem it aims to solve.
- **Example:** "Manual entry of invoice data is time-consuming, error-prone, and leads to payment delays."

Field 4: Estimated Volume

- **Description:** An approximate measure of the frequency or scale of the process (e.g., number of transactions per month).
- **Purpose:** Indicates the potential impact of automation; high-volume processes often yield greater benefits.
- **Example:** "1,200 invoices processed per month"

Sample Use Case Intake Form Entry

Use Case	Business Area	Pain Point	Estimated Volume
Automated Invoice Processing	Finance	Manual entry of invoice data is time-consuming, error-prone, and leads to payment delays.	1,200 invoices/month
Employee Onboarding Emails	Human Resources	Onboarding communications require manual	25 new starters/month

	sending, resulting in inconsistent timing.

Implementing a structured RPA Use Case Prioritisation Template enables organisations to scale their automation efforts effectively, avoid wasted effort, and ensure that resources are focused on the most impactful opportunities. By collecting consistent information on each use case and applying objective criteria, RPA teams can build a robust automation pipeline and demonstrate clear value to stakeholders.

- Review and refine your intake form to suit your organisation's needs.
- Engage relevant business areas to source high-impact use cases.
- Apply the prioritisation framework to build a balanced and scalable automation pipeline.
- Monitor outcomes and adjust criteria as your RPA programme matures.

By following this guide, your organisation will be well positioned to realise the full benefits of RPA, delivering efficiency, accuracy, and value across the business.

3. Value Scoring Model

The Value Scoring Model provides a structured approach to objectively assess and compare proposed automation use cases. By scoring each use case against key value drivers, organisations can ensure that resources are directed towards initiatives that deliver the greatest overall benefit. Below, each value criterion is described in detail, accompanied by practical examples and bullet points for clarity.

Cost Savings Potential

- Evaluate the expected reduction in operational expenditure, such as labour or processing costs, once automation is implemented.
- Example: Automating invoice processing could reduce the need for manual data entry staff, saving up to £30,000 annually.

Cycle Time Reduction

- Measure the anticipated decrease in process completion time, from initiation to conclusion.
- Example: Automated onboarding emails can be sent instantly, reducing the average cycle time from two days to a few minutes.

Error Reduction

- Estimate the potential decrease in mistakes or rework caused by human error.
- Example: Automating data transfers between systems can eliminate manual input errors, reducing correction work by 90%.

Compliance Improvement

- Assess how automation enhances adherence to regulations, policies, or standards.
- Example: Automatically archiving onboarding communications ensures all regulatory documentation is consistently retained.

Customer Impact

- Consider the effect on customer experience, satisfaction, or service quality.
- Example: Faster invoice processing leads to quicker supplier payments and improved vendor relationships.

4. Complexity & Feasibility Scoring

In addition to value, it is crucial to evaluate the complexity and feasibility of automating each use case. This scoring ensures that the automation pipeline is balanced, including both quick wins and more ambitious projects. The following factors should be considered, with examples and bulleted guidance provided for each.

Number of Systems Involved

- Identify how many different IT systems or applications the process interacts with.
- Example: Employee onboarding might involve HR systems, email platforms, and access management tools, increasing integration complexity.

Data Structure Complexity

- Assess whether the data is structured (tables, forms) or unstructured (free text, scanned documents).
- Example: Processing structured invoices from a standard template is less complex than extracting details from varied document formats.

Exception Handling

- Evaluate the frequency and complexity of exceptions or non-standard scenarios that require special handling.
- Example: If 90% of cases follow a standard path but 10% require manual intervention, automation is more feasible than if exceptions are common and unpredictable.

Integration Requirements

- Determine whether robust APIs are available or if automation will rely on screen scraping or other workarounds.
- Example: Integrating with a modern HR system via API is typically more straightforward than automating interactions with legacy systems lacking integration support.

By systematically scoring each use case on both value and complexity, organisations can prioritise automation opportunities that maximise returns while remaining achievable within current technical and organisational constraints.

5. Automation Readiness Index

The Automation Readiness Index is a practical tool designed to help organisations prioritise automation opportunities with the greatest potential for success. By dividing the Value Score by the Complexity Score for each use case, you generate a Priority Ranking that highlights which initiatives are likely to deliver the most benefit with the least effort.

- **Formula:** Automation Readiness Index = Value Score ÷ Complexity Score
- **Interpretation:**
  - A higher index indicates a use case that offers substantial value relative to its implementation complexity-these are your “quick wins”.
  - A lower index may signify a high-value but complex project, or a low-value, low-complexity process; both require careful consideration before proceeding.

Example:

- Use Case A: Value Score = 8, Complexity Score = 2. Automation Readiness Index = 4. This suggests a high-priority, low-hanging fruit for automation.
- Use Case B: Value Score = 7, Complexity Score = 7. Automation Readiness Index = 1. This indicates a more challenging project with less immediate return on investment.

By consistently applying this index, teams can ensure that resources are allocated to initiatives that balance high impact with achievable delivery timelines.

6. Strategic Alignment Check

Beyond quantitative scoring, it is essential to ensure that automation initiatives support the broader direction of the organisation. The Strategic Alignment Check evaluates whether each proposed use case fits with key business objectives, transformation programmes, and leadership priorities.

Alignment with Business Goals

- Assess whether the use case supports current strategic priorities, such as cost optimisation, customer experience, or market expansion.
- Example: Automating customer onboarding may directly contribute to a goal of improving customer satisfaction scores.

Support for Transformation Initiatives

- Consider if the automation aligns with ongoing digital transformation or change programmes within the organisation.
- Example: Streamlining internal reporting through automation could reinforce a wider initiative to digitise business processes.

Executive Sponsorship

- Identify whether senior leaders actively support or champion the use case, increasing its chances of successful adoption and sustained impact.
- Example: An automation project with visible backing from the CFO may gain faster approval and access to necessary resources.

Incorporating a Strategic Alignment Check helps ensure that automation efforts are not only effective but also relevant, sustainable, and fully supported by those steering the organisation's future.

7. Pipeline Roadmap

The Pipeline Roadmap provides a clear view of planned automation initiatives over specific quarters, outlining key details such as the use case, responsible owner, and current project status. This helps teams track progress, allocate resources, and manage dependencies efficiently.

- **Quarter:** Indicates the timeframe in which the automation use case is scheduled for delivery. For example, “Q2 2026” may be earmarked for automating invoice reconciliation.
- **Use Case:** Describes the specific process or function targeted for automation, such as “Automated Customer Feedback Analysis” or “Payroll Data Validation”.
- **Owner:** Identifies the individual or team accountable for driving the project forward. For instance, the Finance Manager may own the invoice automation project.
- **Status:** Tracks the current stage of each initiative. Common statuses include “Planned”, “In Progress”, “Testing”, and “Completed”. Example: The onboarding automation may be listed as “In Progress”, with anticipated completion by the end of Q3.

Quarter	Use Case	Owner	Status

Q1 2026	Invoice Reconciliation Automation	Finance Manager	Completed
Q2 2026	Customer Feedback Analysis	CX Team Lead	Planned
Q3 2026	New Employee Onboarding	HR Director	In Progress

This structured approach ensures transparency and alignment across all stakeholders, allowing for proactive management of the automation portfolio.

8. Governance & Approval Workflow

Robust governance and a well-defined approval workflow are vital for successful automation. These processes ensure that initiatives meet organisational standards and regulatory requirements, while also facilitating efficient decision-making.

Intake Review Process:

- New automation proposals are submitted through a formal intake channel, such as an online form or project management platform.
- Each proposal undergoes an initial assessment to determine feasibility, alignment with strategic goals, and potential impact.
- Example: A proposal to automate procurement requests is reviewed for its expected savings and compatibility with existing systems.

Approval Authority:

- Defined roles are responsible for approving automation projects, such as the Automation Governance Board or designated senior leaders.
- Approval levels may vary depending on project scope or risk-for example, high-impact or cross-functional projects may require executive sign-off.
- Example: Automation of financial reporting may need CFO approval, whereas minor workflow enhancements could be signed off by department heads.

Compliance Checkpoints:

- Projects are reviewed at key stages to confirm adherence to regulatory, security, and ethical standards.
- Checkpoints may include data privacy assessments, technical audits, and documentation reviews to mitigate risks.
- Example: Prior to deployment, an automation handling personal data is examined for GDPR compliance and approved by the data protection officer.

Having a clear governance and approval framework helps organisations maintain control over their automation landscape, ensures compliance, and fosters trust among stakeholders.

9. KPI Definition per Use Case

Establishing clear Key Performance Indicators (KPIs) for each automation use case is crucial to measure success, drive accountability, and demonstrate tangible benefits. By tailoring KPIs to the nature of each initiative, organisations can monitor progress and make informed decisions.

- **Time Saved:** Quantifies the reduction in manual effort required to complete a process. For instance, automating invoice reconciliation may reduce processing time from two days to just a few hours per cycle. This helps teams reallocate resources to more strategic tasks.
- **Cost Avoided:** Measures the financial savings achieved by automating processes, such as minimising overtime, reducing errors, or lowering third-party processing fees. Example: Automated customer feedback analysis eliminates the need for external survey consultants, saving £10,000 annually.
- **SLA Improvement:** Tracks enhancements in Service Level Agreements (SLAs), such as faster response times or higher throughput. For example, after automating new employee onboarding, HR can onboard staff within two days instead of five, improving compliance with SLA targets.
- **Quality Metrics:** Assesses the accuracy, consistency, and reliability of outputs. Automation can lead to fewer data entry errors and more consistent outcomes.

Example: Automated payroll validation ensures 99.9% accuracy in salary calculations, reducing payroll disputes.

Collectively, these KPIs provide a comprehensive view of automation's impact, helping stakeholders to validate benefits and justify continued investment.

10. Continuous Improvement Loop

To ensure the automation programme remains effective and aligned with organisational goals, a continuous improvement loop should be implemented. This approach encourages regular assessment and evolution of the automation portfolio.

- **Review Outcomes:** Periodically evaluate the performance of each automated process against its KPIs. For instance, a quarterly review might reveal that the invoice reconciliation bot consistently meets its time-saving targets but could improve error reduction.
- **Retire Low-Value Bots:** Identify and decommission bots that no longer deliver significant value or have been rendered obsolete by changing business processes. Example: A bot designed for an outdated procurement system may be retired to free up resources for newer initiatives.
- **Add New High-Impact Use Cases:** Continuously scan for new opportunities where automation can drive substantial benefits. Teams can gather feedback from business units, analyse emerging trends, and prioritise high-impact projects-such as automating regulatory reporting in response to new compliance requirements.

This ongoing cycle of review, retirement, and renewal ensures that the automation strategy remains dynamic, relevant, and focused on delivering maximum value across the organisation.

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