



TOOL · FIND THE WORKFLOW

The Workflow Shortlist

Five tests to find the workflow to automate first, and a written list of the ones to leave alone.

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strikearc.ai/resources/workflow-shortlist

The Workflow Shortlist: find the workflow to automate first.

Almost any work that repeats can be automated. What you need to know is which one pays first. Score up to five workflows on five tests and leave with a ranked shortlist, a do-not-build list and a note to bring to the intro call.

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[The worksheet](#) PDF [The scoring sheet](#) XLSX

How to read your shortlist.

The first workflow you automate sets the budget, your team's trust in the system and the number your CFO remembers. So pick it on evidence. Each of the five tests asks one thing about the work, and each one is scored from 1 to 5.

01 Volume.

A process that runs hundreds of times a week pays back faster than one that runs four times.

02 Cost of delay.

A quote that goes out the same day wins jobs a Thursday quote loses. Score what waiting costs in revenue or in a customer's patience.

03 Cost of errors.

Errors that reach customers, invoices or cash score high. Mistakes caught before anyone sees them score low.

04 System access.

A system can only work on what it can read: email, documents, the ERP, the CRM, shared files. Paper and memory score low.

05 A named owner.

One person who will say whether it works, and who can approve changes to the process. A committee scores a 1.

Of the workflows that stay off the do-not-build list below, the highest total goes first. When two tie, the one whose cost or delay you already know goes ahead, because you can prove its result sooner. After that, the tool favours the workflow where delay and errors cost the most.

Why some workflows land on the do-not-build list.

A high total does not save a workflow that fails one of four checks. Rare work (a volume of 1) costs more to set up than it returns. Work with no data trail (a system access score of 2 or less) gives a system nothing to read. Work with no owner (2 or less) has nobody to judge the result or update the process when the business changes. And a process about to change, with a new ERP or system on the way, is worth automating once, after the move.

Write the list down and keep it. It protects the budget, and it stops the same ideas coming back every quarter. A workflow can leave the list once the reason is fixed: the inputs move into email or a system, someone takes ownership, or the new system goes live.

What to do with the workflow at the top.

Put today's numbers on the record before anything changes. For inquiries and callbacks, run the [lead response audit](#). For vendor invoices, keep the [invoice exception log](#) for two weeks. Then write the workflow down on one page with [the Workflow Brief](#), and bring it to a 30-minute call.

On the call we will tell you straight whether a play from the StrikeArc PowerPlays Library fits. If one could, your StrikeArc Scout link follows by email. StrikeArc Scout scores every play in the StrikeArc PowerPlays Library against your answers, and a person walks you through the readout. The method behind these tests is in the guide to [which process to automate first](#).

Bring the workflow that costs you the most.

Book a 30-minute intro call at strikearc.ai/book, or write to info@strikearc.ai.

The latest version of this piece lives at strikearc.ai/resources/workflow-shortlist.

The Workflow Shortlist worksheet

Write up to five workflows across the top. Score each from 1 to 5 on every test, add the five scores, and tick what each one moves. The highest total goes first, unless it scores 1 on volume, 2 or less on system access or owner, or is about to change: those go on the do-not-build list until the reason is fixed.

TEST	WORKFLOW 1	WORKFLOW 2	WORKFLOW 3	WORKFLOW 4	WORKFLOW 5
Name					
Volume 1: It happens a few times a month. 5: It happens many times a day.					
Cost of delay 1: Nobody notices a wait. 5: A slow answer loses the job, the discount or the customer.					
Cost of errors 1: Mistakes are caught before anyone sees them. 5: Mistakes reach customers, invoices or cash.					
System access 1: The input lives on paper or in someone's head. 5: The input arrives by email or lives in the ERP, the CRM or shared files.					
A named owner 1: A committee owns it, or nobody does. 5: One person owns it and can change the process.					
Total, out of 25					
What it moves Grow revenue, reduce costs or save time					
About to change? A new ERP, a new system or a reorganization					
Today's cost or delay known? Breaks a tie					

The do-not-build list

WORKFLOW	WHY IT WAITS	WHAT WOULD REOPEN IT