1. Choosing Effective Use-Cases for Automation

The best use cases to choose for Automation are ones that:

1. Already have some **material available** mapping out the document content or process;
2. Demonstrate immediate value as a **standalone improvement** through automation; and are
3. **Widely understood** so that broader stakeholders can rationalise the value easily.

There are broadly three types of use cases, or combinations of these use cases:

1. **Process Automation:** Workflows that involve multiple stakeholders carrying out separate activities such as information input, decision making, reviewing, approving/rejecting etc.
2. **Document Automation**: Documents that are manually and repetitively.
3. **Assessment Automation**: Spreadsheet or calculation processes that generate an outcome.

2. Preparing the Content, Logic and Requirements (CLR)

Process Automation	CLR Questions	Example Format(s)
✔ **Process Map** *A visual representation of key stakeholders and their key tasks and actions.*	☐ Have all stakeholders been mapped out in this process? ☐ Have the key activities and interactions of each stakeholder with the process been identified?	+ Visio Diagram
✔ **Content** *Detailed list of actions and/or information that each stakeholder needs to provide.*	☐ Is the information that must be retrieved from each stakeholder, or the actions they need to perform in the process documented?	+ Excel Spreadsheet
Document Automation		
✔ **Document Template** *A template or an example output of the intended document.*	☐ Is there a template of the intended document? ☐ Is there an example output of the intended document?	+ Docx + PDF
✔ **Logic** *Business rules that dictate how the document is generated.*	☐ Has all conditional logic that is expected to be automated in the document been mapped on the template?	+ Comments embedded on docx template.
✔ **Process Map** *See 'Process Automation'*	☐ *See 'Process Automation' above*	*+ Visio Diagram*
Assessment Automation		
✔ **Calculation Template/Example** *Usually a spreadsheet with embedded calculation rules.*	☐ Is there an existing tool that is used for the calculation? ☐ If not, is there an example of how the calculation is generated?	+ Excel spreadsheet
✔ **Logic** *Business rules that dictate how the calculations are made.*	☐ Have the rules/formulas to indicate how calculations are generated been documented? ☐ Have exceptions been identified? ☐ If there is weighted scoring, have the scores been assigned to the different factors?	+ Comments embedded on excel template.
✔ **Expected Inputs/Outputs** *Examples to ensure proper understanding and functional testing.*	☐ Have examples of inputs and outputs been provided?	+ Excel spreadsheet (separate tab)