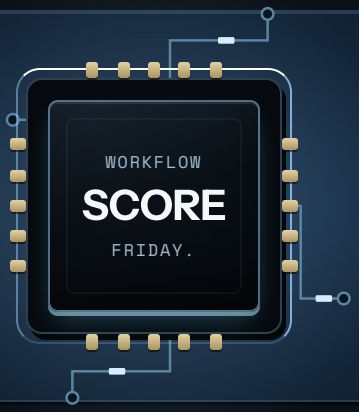
WORKFLOWS · PDF SCORECARD

First AI Workflow Scorecard

List the tasks your team repeats, score each one, and pick the first to automate. Then record a baseline before anything is built.

6 SECTIONS · SCORE OUT OF 12 · PRINT AND FILL



01 Score your candidates

1 = LOW · 3 = HIGH

TASK	FREQUENT	CONSISTENT	CONNECTED	RECOVERABLE	TOTAL
	1 2 3	1 2 3	1 2 3	1 2 3	/ 12
	1 2 3	1 2 3	1 2 3	1 2 3	/ 12
	1 2 3	1 2 3	1 2 3	1 2 3	/ 12
	1 2 3	1 2 3	1 2 3	1 2 3	/ 12
	1 2 3	1 2 3	1 2 3	1 2 3	/ 12

FREQUENT
It happens every week.

CONSISTENT
The same steps most of the time.

CONNECTED
The data lives in tools you can reach.

RECOVERABLE
A mistake is easy to spot and fix.

02 Do not start with

4 TRAPS

- **A broken process.** Fix it first; automation repeats the problem faster.
- **Anything touching money or contracts without review.**
- **The most impressive idea.** Start with the most repeatable one.
- **A process only one person understands.** Write it down first.

03 Check the data it touches

2 CHECKS

- **Take stock:** list the personal or sensitive information the task uses.
- **Scale down:** send the AI only what the task needs.

Sensitive data this task uses

04 Baseline before you build

FILL IN

MEASURE	BEFORE	AFTER LAUNCH
Volume per week		
Time per task		
Error rate		
Response time		

05 Run it as a pilot

4 CHECKS

- **The success measure:** one number you will compare with the baseline.
- **The owner:** one person responsible for the results.
- **The review rule:** what a person checks, and how often.
- **The stop condition:** what would make you pause it.

06 Payback worksheet

FILL IN

ITEM	YOUR NUMBER
Hours saved per week	
Loaded hourly cost	
Value of time saved per month Hours × cost × 4.33	
Running costs per month Software, AI usage, review time	
Net monthly value	
One-time build cost	
Payback period Build cost ÷ net monthly value	

NEXT STEP

Workflow automation services

www.doitwithfriday.com/services/workflows/

Build with Friday →

BASED ON FRIDAY FIELD NOTES

www.doitwithfriday.com/blog/what-to-automate-first/

www.doitwithfriday.com/blog/measure-ai-automation-roi/

General guidance, not legal or security advice for your specific setup. Questions: hello@doitwithfriday.com