CONCEPT

Automation Opportunity Assessment Training: Procedure Redesign and Measuring Efficiency Gains



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Introduction:

Automation Opportunity Assessment Training: Procedure Redesign and Measuring Efficiency Gains is a 3-day course for process owners, department managers, operational excellence staff and business analysts, ending with an Automation Opportunity and Benefits Case for one procedure. Many organisations buy digital tools before fixing the procedure or recording a baseline, so they cannot show whether automation saved time, cost or errors. Nominees already own or improve procedures and need no programming skills; they work through case studies with real procedure data. CoreConcept Training Center delivers this automation opportunity assessment course.

Course Objectives:

- Screen a unit's procedures for automation suitability using volume, rule stability, data format and exception rates
- Measure the current state of a procedure through cycle time, cost per transaction, error rate and process cycle efficiency
- Redesign a procedure with the Lean DOWNTIME waste categories before any digital solution is chosen
- Match each redesigned step to a fitting digital solution type, from e-forms and workflow to bots and integration
- Build a benefits realisation plan with baselines, KPIs, owners and a post-implementation review date
- Produce an Automation Opportunity and Benefits Case ready for decision by the procedure sponsor

Target Audience:

- Process owners responsible for the performance and documentation of a cross-team procedure
- Department managers responsible for service levels, staffing and operating cost in their unit
- Operational excellence and quality staff responsible for improvement projects and process measurement
- Business analysts responsible for gathering requirements and preparing cases for digital projects
- Digital transformation coordinators responsible for tracking the results of digital initiatives

Course Outline:

Day 1: Automation Opportunity Screening and Current-State Baselines

- Procedure Inventory Template With Volume and Frequency Data
- Automation Suitability Scorecard for Rules, Data and Exceptions
- Cycle Time and Cost per Transaction Baseline Sheet
- Process Cycle Efficiency Calculation From Value-Added Time
- Error Rate and Rework Log for Current Procedures

Day 2: Procedure Redesign, Solution Fit and Benefits Planning

- Lean DOWNTIME Waste Review of Each Procedure Step
- Procedure Simplification by Removing Approvals and Duplicate Entry
- Digital Solution Fit Matrix From E-Forms to Integration
- Benefits Realisation Plan With Owners and Review Dates
- Efficiency KPI Set With Targets and Data Sources

Day 3: Case Study Practice and the Benefits Case

- Case Study Screening Procedures in a Procurement Unit
- Case Study Redesigning a Customer Service Request Procedure
- Before and After Impact Comparison Using Baseline Data
- Post-Implementation Review Checklist for Digital Solutions
- Automation Opportunity and Benefits Case Completion and Review

Skills You Will Gain:

- Automation Suitability Screening
- Process Baseline Measurement
- Lean Waste Identification
- Procedure Simplification
- Digital Solution Matching
- Benefits Realisation Planning
- Efficiency KPI Design
- Post-Implementation Review

Why Attend This Course:

- Deliver an Automation Opportunity and Benefits Case to the procedure sponsor, with baseline figures, a redesigned procedure and target KPIs
- Choose which procedures to simplify, digitise or leave unchanged on evidence rather than vendor demonstrations
- Avoid spending on digital tools that automate waste or cannot show measurable savings after launch
- Equip colleagues with the suitability scorecard, baseline sheet and review checklist for further procedures

Conclusion:

Back at work, the participant presents the Automation Opportunity and Benefits Case to the procedure sponsor and, where relevant, the digital or IT function. The sponsor uses it to decide whether to fund redesign, a digital solution or both, and to confirm who owns each benefit. After the first months of operation, the unit should compare live figures with the recorded baseline, hold the post-implementation review, and decide whether to extend the approach to the next procedures on the screened list.

Frequently Asked Questions FAQ:

What should participants know before an automation opportunity assessment course?

Participants should know at least one procedure in their unit, including its steps, approvals and rough volumes. Bringing a procedure document, sample forms and any available timing or error data lets them use their own figures in the case work.

How does an automation opportunity assessment course differ from a hands-on automation build course?

A build course trains people to model processes and construct workflows or bots on specific platforms. This course stays non-technical, deciding which procedures to automate, simplifying them first and measuring the efficiency gains, so managers can sponsor and evaluate digital solutions.

How is efficiency measured in an automation opportunity assessment?

Efficiency is measured against a recorded baseline of cycle time, cost per transaction, error rate and process cycle efficiency, which divides value-added time by total lead time. The same measures are repeated after launch to show the real gain.

What do participants take back from an automation opportunity assessment course?

Participants take back an Automation Opportunity and Benefits Case containing a screened procedure list, baseline measures, a redesigned procedure, a digital solution fit, a benefits realisation plan with KPIs and a post-implementation review checklist.