Category

Enterprise Transformation

Automation & Process Digitization Playbook (RPA, Workflow, Low-Code)

A triage method for matching the right automation technology, RPA, workflow/BPM, or low-code, to each process instead of defaulting to whichever tool IT already owns.

- Practitioner
- Intermediate
- Template Included
- Workshop Ready

- Mithun A. Sridharan

- 06 December 2022

- 7 minute(s)

Overview

Stop defaulting every automation request to RPA. Triage each process by volume, complexity, and stability to pick the right tool, then build a governed automation pipeline.

How do we know if a process should be automated at all versus just redesigned manually?

If the process has a high exception rate (above roughly 20%) and low volume, the ROI on automation is usually poor regardless of tool — redesigning the manual process to remove unnecessary steps often delivers more value for less investment than automating it as-is.

Can one process use more than one automation tool tier?

Yes, and it's common — a workflow/BPM tool can orchestrate the overall approval process while an RPA bot handles a specific high-volume, stable sub-task like data entry into a legacy system with no API. The triage framework applies at the sub-task level when a process is a mix.

How often do RPA bots typically break due to source system changes?

It varies widely by how frequently the target application's UI changes, but organizations without a stability check in their triage process commonly see 15-30% of their RPA inventory requiring maintenance fixes in any given quarter — which is exactly the signal that some of those bots were the wrong tool choice.

What's a reasonable maintenance budget to plan for per automation?

A commonly used planning rule of thumb is 15-20% of the original build cost per year for RPA bots against unstable UIs, lower for workflow/BPM and low-code builds against stable APIs. Track actuals per automation in the inventory register rather than relying on the rule of thumb indefinitely.

Who should have authority to retire an automation?

The named business owner, informed by the quarterly portfolio review's value-vs-maintenance data — retirement shouldn't require the same approval chain as building a new automation, or dead-weight bots will linger simply because no one wants to own the decommission decision.

{ "@context": "https://schema.org", "@type": "FAQPage", "mainEntity": [{ "@type": "Question", "name": "How do we know if a process should be automated at all versus just redesigned manually?", "acceptedAnswer": { "@type": "Answer", "text": "If the process has a high exception rate (above roughly 20%) and low volume, the ROI on automation is usually poor regardless of tool — redesigning the manual process to remove unnecessary steps often delivers more value for less investment than automating it as-is." } }, { "@type": "Question", "name": "Can one process use more than one automation tool tier?", "acceptedAnswer": { "@type": "Answer", "text": "Yes, and it's common — a workflow/BPM tool can orchestrate the overall approval process while an RPA bot handles a specific high-volume, stable sub-task like data entry into a legacy system with no API. The triage framework applies at the sub-task level when a process is a mix." } }, { "@type": "Question", "name": "How often do RPA bots typically break due to source system changes?", "acceptedAnswer": { "@type": "Answer", "text": "It varies widely by how frequently the target application's UI changes, but organizations without a stability check in their triage process commonly see 15-30% of their RPA inventory requiring maintenance fixes in any given quarter — which is exactly the signal that some of those bots were the wrong tool choice." } }, { "@type": "Question", "name": "What's a reasonable maintenance budget to

plan for per automation?", "acceptedAnswer": { "@type": "Answer", "text": "A commonly used planning rule of thumb is 15-20% of the original build cost per year for RPA bots against unstable UIs, lower for workflow/BPM and low-code builds against stable APIs. Track actuals per automation in the inventory register rather than relying on the rule of thumb indefinitely." } }, { "@type": "Question", "name": "Who should have authority to retire an automation?", "acceptedAnswer": { "@type": "Answer", "text": "The named business owner, informed by the quarterly portfolio review's value-vs-maintenance data — retirement shouldn't require the same approval chain as building a new automation, or dead-weight bots will linger simply because no one wants to own the decommission decision." } }] }

Subscriber access

Unlock this playbook

This playbook — including every framework, template, and step-by-step section — is available free to Think Insights subscribers. Enter your email to unlock it instantly and get our weekly insights newsletter. No account needed, and access is remembered on this device.

First Name

Last Name

Email

Country - Select -

■ I agree to data processing in accordance with GDPR

Submit

Leave this field blank

References

Related playbooks

Enterprise Transformation

Telco Network & 5G/Edge Services Digital Transformation Playbook

A framework for telecommunications network and 5G/edge services digital transformation that identifies genuine new revenue and service opportunities enabled by

- Executive

- Advanced
- Template Included

Read playbook

Enterprise Transformation

AI & Digital Transformation Talent, Skills & Capability Building Playbook

A framework for building AI and digital transformation talent and capability deliberately — targeted skills assessment, structured capability building, and tale

- Executive
- Intermediate
- Template Included

Read playbook

Enterprise Transformation

Digital Transformation Risk, Resilience & Business Continuity Playbook

A framework for digital transformation risk, resilience, and business continuity planning that treats the transformation program itself as a source of operation

- Executive
- Advanced
- Template Included

Read playbook

Talk to our automation team

Author

Mithun A. Sridharan Thought Leader

I'm Mithun A. Sridharan, Founder of this website - Think Insights - on Strategy, Management Consulting, Leadership, Digital Transformation, and Data Literacy. Follow me on social media or connect with me on LinkedIn for updates.