

Category

Digital 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

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- 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.

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