

# Process Automation Assessment

ILLUSTRATIVE EXAMPLE

15-person B2B services company

**Process assessed:**

Incoming enquiry → qualification → quotation → follow-up

**Not client work**

Example of how ActiveHub assesses which parts of a business process should be automated, assisted or kept human.

# Process Automation Assessment

|                  |                                                                                                                                                |
|------------------|------------------------------------------------------------------------------------------------------------------------------------------------|
| BUSINESS PROFILE | 15-person B2B services company                                                                                                                 |
| PROCESS ASSESSED | Incoming enquiry → qualification → quotation → follow-up                                                                                       |
| PURPOSE          | Determine which parts of the process should be automated, which should remain human, and what should be fixed before automation is introduced. |
| STATUS           | <b>Illustrative example — not client work</b>                                                                                                  |

## What should this business automate?

The process contains several repetitive administrative steps that are suitable for automation.

However, the most important decisions in the process still require commercial judgement, context and accountability.

The recommendation is therefore **not** to automate the process end to end.

Instead:

- automate structured information capture;
- automate routine completeness checks;
- automate routing where rules are clear;
- automate routine follow-up and status updates;
- use automation to assist quotation preparation;
- keep qualification judgement, pricing exceptions and final approval with people.

The process should also be standardised before wider automation is introduced.

## OVERALL RECOMMENDATION

**Automate the movement of information and routine administrative steps. Keep commercial judgement, exceptions and final approval with people.**

A second principle applies throughout the assessment:

**Do not automate an inconsistent process before clarifying the rules that govern it.**

## Recommendation by process step

| PROCESS STEP                                             | RECOMMENDATION                   | REASON                                                                       |
|----------------------------------------------------------|----------------------------------|------------------------------------------------------------------------------|
| Capture enquiry information                              | » AUTOMATE                       | Structured capture reduces repeated manual entry                             |
| Check whether required information is present            | » AUTOMATE                       | Clear rules can identify missing fields                                      |
| Initial categorisation and routing                       | » AUTOMATE WITH SAFEGUARDS       | Most cases can follow rules, but exceptions need human handling              |
| Decide whether an opportunity is commercially attractive | ⚠ KEEP HUMAN                     | Requires commercial judgement and context                                    |
| Request routine missing information                      | » AUTOMATE WITH SAFEGUARDS       | Standard requests can be automated, unusual cases should be reviewed         |
| Assign internal owner                                    | » AUTOMATE WHERE RULES ARE CLEAR | Suitable when responsibility rules are explicit                              |
| Draft standard quotation content                         | 🔗 ASSIST                         | Repeated content can be prepared automatically, but review remains necessary |
| Final pricing and commercial judgement                   | ⚠ KEEP HUMAN                     | Requires accountability and business judgement                               |
| Send an approved quotation                               | » AUTOMATE AFTER APPROVAL        | Sending is routine once approval has been given                              |
| Schedule follow-up                                       | » AUTOMATE                       | Timing rules are straightforward                                             |
| Record process status and outcome                        | » AUTOMATE WHERE RELIABLE        | Useful where system events provide dependable status information             |

### IMMEDIATE DECISION

## Do not commission a large automation project.

First:

1. define the minimum information required for an enquiry;
2. clarify qualification and ownership rules;
3. standardise quotation structure;
4. define the process statuses;
5. automate a small number of low-risk administrative steps.

Use the results to decide whether broader automation is justified.

# Current process

## Process overview

The illustrative business receives enquiries from prospective business customers.

Enquiries arrive primarily through:

- email;
- the website;
- referrals;
- direct contact with employees.

From there, staff determine:

- what the customer needs;
- whether sufficient information has been supplied;
- whether the work is within scope;
- who should handle the opportunity;
- what should be quoted;
- when follow-up is needed.

The process currently relies heavily on individual employees remembering what to do next.

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### 5 Internal owner assigned

The enquiry is passed to the person considered most appropriate.

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### 6 Quotation prepared

The owner creates a quotation, often using:

- an existing template;
- previous quotations;
- standard service descriptions;
- manually entered customer information;
- pricing judgement.

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### 7 Quotation reviewed

Where required, another employee or manager reviews pricing, scope or wording.

## Current-state process

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### 1 Enquiry arrives

A new enquiry reaches a shared or individual inbox, website form or employee.

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### 2 Basic information checked

Someone reads the message and determines whether enough information is available.

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### 3 Enquiry qualified

An employee decides whether:

- the request is relevant;
- the business can provide the service;
- the customer appears suitable;
- the opportunity deserves further attention.

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### 4 Missing information requested

If required details are absent, an employee writes a response asking for additional information.

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### 8 Quotation sent

The quotation is sent to the prospective customer.

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### 9 Follow-up scheduled

Someone decides when to follow up.

In practice, this may depend on a reminder, calendar entry or personal memory.

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### 10 Outcome recorded

The enquiry may eventually become:

- won;
- lost;
- declined;
- deferred;
- inactive.

The status is not always updated consistently.

# Where time and friction occur

The principal issue is not that every step is manual.

**The issue is that routine administrative work and high-judgement decisions are mixed together.**

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## Inconsistent enquiry information

Enquiries do not always contain the same information.

Staff may need to determine:

- what is missing;
- whether it matters;
- what question should be asked next.

This creates unnecessary back-and-forth.

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## Unclear ownership

Some enquiries have an obvious owner.

Others depend on:

- service type;
- customer type;
- employee availability;
- existing relationships;
- specialist knowledge.

Where rules are not explicit, ownership can become unclear.

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## Quotation preparation repeats similar work

Quotations often reuse:

- standard descriptions;
- scope language;
- terms;
- common structure.

But the final quotation may still require:

- pricing judgement;
- exclusions;
- exceptions;
- negotiation;
- scope decisions.

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## Status information can become unreliable

If employees must manually remember to update status, the process record may not accurately reflect what has happened.

This reduces the usefulness of reporting and makes future automation harder.

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## Repeated information handling

Information may be copied manually between:

- email;
- website submissions;
- quotation templates;
- customer records;
- internal notes.

This creates repetitive work and opportunities for inconsistency.

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## Qualification depends on judgement

Whether an enquiry is worth pursuing may depend on:

- fit;
- timing;
- complexity;
- relationship context;
- likely value;
- capacity;
- commercial risk.

These factors are not all suitable for rigid automation.

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## Follow-up is inconsistent

Routine follow-up is easy to forget when employees are busy.

There may be no consistent rule for:

- when to follow up;
- how many times;
- when an opportunity should be marked inactive.

# Automation suitability by process step

Each step was assessed against:

- repetition;
- rule clarity;
- input consistency;
- exception frequency;
- judgement required;
- consequence of error;
- human-review requirement;
- data sensitivity;
- system dependency;
- reversibility.

The assessment is qualitative. It is intended to guide decisions, not create artificial numerical precision.

| #  | PROCESS STEP                                              | AUTOMATION SUITABILITY        | RECOMMENDATION                   |
|----|-----------------------------------------------------------|-------------------------------|----------------------------------|
| 1  | Capture enquiry information                               | High                          | » AUTOMATE                       |
| 2  | Check whether required information is present             | High                          | » AUTOMATE                       |
| 3  | Initial categorisation and routing                        | Medium–High                   | » AUTOMATE WITH SAFEGUARDS       |
| 4  | Decide whether the opportunity is commercially attractive | Low                           | ⚠ KEEP HUMAN                     |
| 5  | Request routine missing information                       | High for routine cases        | » AUTOMATE WITH SAFEGUARDS       |
| 6  | Assign internal owner                                     | Medium–High where rules exist | » AUTOMATE WHERE RULES ARE CLEAR |
| 7  | Draft standard quotation content                          | Medium–High                   | ⦿ ASSIST                         |
| 8  | Final pricing and commercial judgement                    | Low                           | ⚠ KEEP HUMAN                     |
| 9  | Send approved quotation                                   | High after approval           | » AUTOMATE AFTER APPROVAL        |
| 10 | Schedule follow-up                                        | High                          | » AUTOMATE                       |
| 11 | Record status and outcome                                 | Medium–High                   | » AUTOMATE WHERE RELIABLE        |

» Automated step
⦿ Assisted step
⚠ Human decision
⤴ Exception / escalation

## STEP 1 Capture enquiry information

### CURRENT SITUATION

Information reaches the business in different formats and may need to be re-entered manually.

### AUTOMATION SUITABILITY

High

### RECOMMENDATION

» AUTOMATE

Use structured capture where practical so key information can enter the process once.

This could include:

- customer identity;
- business name;
- contact information;
- service requested;
- description of need;
- preferred timing;
- relevant contextual fields.

### WHY

The step is repetitive, rule-based and easy to verify.

Automation should reduce repeated manual transcription without removing judgement.

## STEP 2 Check whether required information is present

### CURRENT SITUATION

Employees manually identify obvious missing information.

### AUTOMATION SUITABILITY

High

### RECOMMENDATION

» AUTOMATE

The process can check whether defined required information is present before the enquiry progresses.

### WHY

The rules can be explicit.

For example:

- required field present;
- field absent;
- information requires clarification.

#### ◉ SAFEGUARD

A completeness check should not be confused with qualification.

An enquiry can be complete and still be commercially unsuitable.

## STEP 3 Initial categorisation and routing

### CURRENT SITUATION

Employees decide what type of enquiry has arrived and who should see it.

### AUTOMATION SUITABILITY

Medium-High

### RECOMMENDATION

» AUTOMATE WITH SAFEGUARDS

Routine cases may be categorised and routed automatically where rules are sufficiently clear.

Examples:

- service category;
- region;
- existing versus new customer;
- enquiry type;
- known specialist requirement.

#### ↪ HUMAN EXCEPTION

Unclear, unusual or sensitive enquiries should enter an exception queue for human review.

### WHY

Routing is suitable for automation when the rules are known.

The danger is not the routine case.

The danger is forcing ambiguous cases into an incorrect category because the process assumes every enquiry fits a predefined rule.

## STEP 4 Decide whether the opportunity is commercially attractive

### CURRENT SITUATION

Employees decide whether the business should pursue the opportunity.

### AUTOMATION SUITABILITY

Low

### RECOMMENDATION

KEEP HUMAN

### WHY

The decision may depend on:

- customer fit;
- available capacity;
- likely value;
- relationship context;
- strategic relevance;
- risk;
- timing;
- unusual circumstances.

These factors often require context that is difficult to reduce to dependable rules.

Automation may present relevant information to the decision-maker.

It should not make the final commercial decision.

## STEP 5 Request routine missing information

### CURRENT SITUATION

Employees write similar messages asking customers for missing information.

### AUTOMATION SUITABILITY

High for routine cases

### RECOMMENDATION

» AUTOMATE WITH SAFEGUARDS

Where missing information is clearly defined, the system may prepare or send a standard request.

### SUITABLE EXAMPLES

- missing business name;
- missing service selection;
- missing timing information;
- missing document already specified as necessary.

### HUMAN EXCEPTION

An employee should handle cases where:

- the request is ambiguous;
- several interpretations are possible;
- the customer has already supplied contextual information that changes the question;
- the response could affect the commercial relationship.

### WHY

The administrative action is automatable.

The interpretation of unusual situations is not.

## STEP 6 Assign internal owner

### CURRENT SITUATION

Responsibility is assigned manually.

### AUTOMATION SUITABILITY

**Medium-High where rules exist**

### RECOMMENDATION

» **AUTOMATE WHERE RULES ARE CLEAR**

Suitable rules might use:

- service category;
- geography;
- existing account ownership;
- specialist expertise.

### FIX FIRST

If the business cannot explain who should own a particular type of enquiry, software cannot reliably solve the ambiguity.

The ownership model needs to be defined first.

## STEP 7 Draft standard quotation content

### CURRENT SITUATION

Employees repeatedly recreate similar quotation content.

### AUTOMATION SUITABILITY

**Medium-High**

### RECOMMENDATION

● **ASSIST**

Automation may prepare a draft using:

- approved templates;
- selected service descriptions;
- customer information;
- standard clauses;
- defined scope elements.

### WHY NOT FULLY AUTOMATE?

The quotation may still depend on:

- scope interpretation;
- pricing;
- exclusions;
- delivery assumptions;
- unusual customer requirements.

The objective should be to reduce repetitive preparation, not remove commercial review.

## STEP 8 Final pricing and commercial judgement

### CURRENT SITUATION

An employee decides the final commercial offer.

### AUTOMATION SUITABILITY

**Low**

### RECOMMENDATION

👤 **KEEP HUMAN**

### WHY

Pricing may depend on factors such as:

- complexity;
- urgency;
- capacity;
- risk;
- relationship;
- exceptions;
- negotiation context.

Automation may provide relevant information or standard pricing rules.

Final responsibility should remain with an authorised person.

## STEP 9 Send approved quotation

### CURRENT SITUATION

The employee sends the quotation after approval.

### AUTOMATION SUITABILITY

**High after approval**

### RECOMMENDATION

» **AUTOMATE AFTER APPROVAL**

Once:

- quotation content is final;
- pricing is approved;
- recipient is confirmed;

the sending step itself is routine.

### ○ SAFEGUARD

Automation should not bypass the required approval step.

## STEP 10 Schedule follow-up

### CURRENT SITUATION

Follow-up timing depends too much on individual memory.

### AUTOMATION SUITABILITY

**High**

### RECOMMENDATION

» **AUTOMATE**

Use explicit rules for routine follow-up.

Possible states:

- quotation sent;
- follow-up due;
- response received;
- further action required;
- inactive.

### WHY

Scheduling a reminder does not require commercial judgement.

The follow-up conversation itself may.

## STEP 11 Record status and outcome

### CURRENT SITUATION

Employees update records inconsistently.

### AUTOMATION SUITABILITY

**Medium-High**

### RECOMMENDATION

» **AUTOMATE WHERE RELIABLE**

Use dependable process events to update status where possible.

Examples:

- quotation sent;
- follow-up scheduled;
- customer responded;
- opportunity closed.

### ○ SAFEGUARD

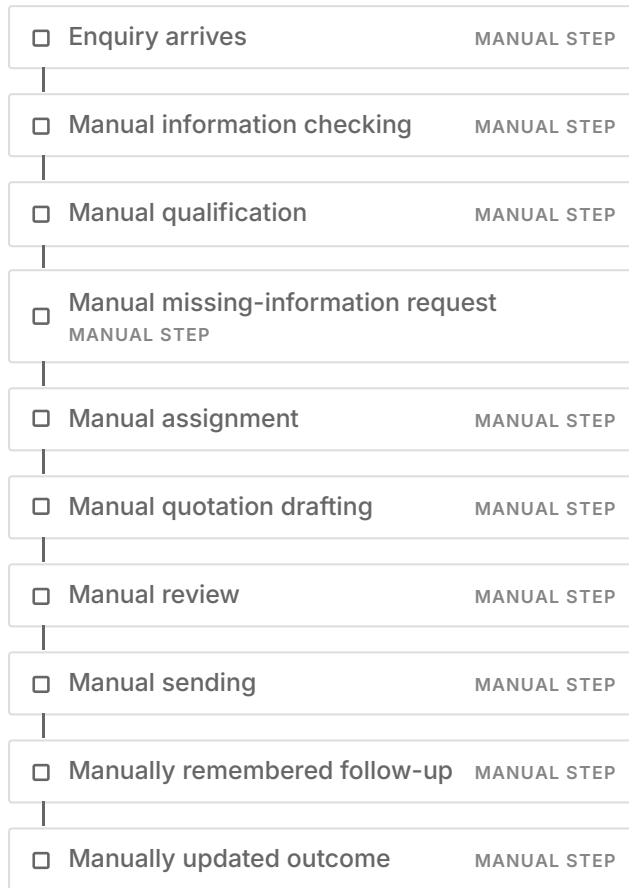
Do not infer important commercial outcomes merely because no activity has occurred.

For example, "no reply" should not automatically become "lost" unless the business explicitly defines that rule.

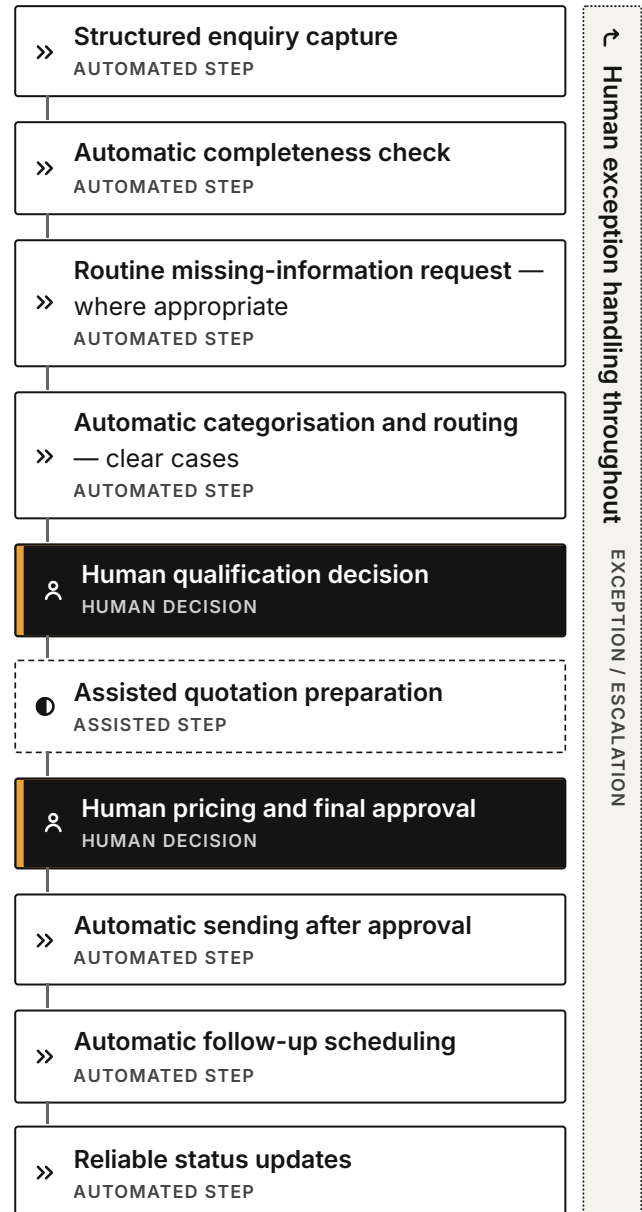
# Current-state vs recommended-state process

☐ Manual step
 ☒ Automated step
 ☐ Assisted step
 ☒ Human decision
 ☐ Exception / escalation

## Current state



## Recommended state



## RECOMMENDED PROCESS PRINCIPLE

**Automate predictable movement.**  
**Escalate uncertainty. Preserve judgement.**

# Recommended future process

## Design principle

The recommended process separates:

- routine information movement;
- rule-based checks;
- judgement;
- exceptions;
- approval.

The aim is not maximum automation.

The aim is to reduce unnecessary administration while preserving human control where it matters.

## Recommended-state process

### 1 Structured enquiry received >> Automated step

Key information enters the process in a consistent form where possible.

### 3 Automatic initial categorisation >> Automated step

Clear cases are categorised using defined rules.  
Ambiguous cases go to a human exception queue.

### 5 Human qualification decision ⓘ Human decision

The responsible employee decides whether the opportunity should progress.

### 7 Human pricing and approval ⓘ Human decision

An authorised employee confirms:

- scope;
- pricing;
- exceptions;
- final wording.

### 9 Automatic follow-up scheduling >> Automated step

The process creates the appropriate next action.

### 2 Automatic completeness check >> Automated step

The process identifies whether required information is present.

If not, a routine information request may be generated.

### 4 Routing >> Automated step

Where ownership rules are explicit, the enquiry is routed automatically.

Where they are not, a person assigns ownership.

### 6 Assisted quotation preparation ⓘ Assisted step

Approved standard content and known customer information are used to prepare a first draft.

### 8 Automatic sending after approval >> Automated step

The approved quotation is sent without requiring repetitive administration.

### 10 Status updated >> Automated step

Reliable system events update the process record.

Human intervention remains available for exceptions.

# What should remain human?

Automation should remove unnecessary administration.

**It should not remove decisions that materially depend on business judgement.**

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## 👤 Commercial attractiveness

A person should decide whether an opportunity is worth pursuing.

The decision may involve context that is not captured in structured fields.

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## 👤 Unusual customer situations

Not every enquiry will fit the standard process.

People should handle:

- unusual requirements;
- unclear requests;
- sensitive circumstances;
- conflicting information;
- relationship considerations.

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## 👤 Pricing exceptions

Standard pricing rules may assist.

Exceptions should remain subject to authorised judgement.

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## 👤 Final quotation approval

The business should know who is accountable for the final offer.

Automation should not send an unapproved commercial commitment.

### Ambiguous qualification

Where the system cannot confidently apply the rules, the correct outcome is:

👤 **send to a person** not: ~~force a decision~~

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## 👤 Relationship judgement

The process may know the status of an enquiry.

It does not necessarily understand:

- tone;
- negotiation dynamics;
- strategic relationships;
- reputational implications.

Human involvement remains valuable where those factors matter.

# Fix before automating

Several improvements should happen before the business attempts wider automation.

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## ≡ Define minimum enquiry information

Agree what information is genuinely required before an enquiry can progress.

Avoid asking for information merely because a form can contain another field.

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## ≡ Define qualification rules

Separate:

- objective rules;
- useful indicators;
- judgement.

Do not pretend judgement is a rule simply to make automation easier.

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## ≡ Clarify ownership

Define when ownership can be assigned automatically and when a manager or coordinator should decide.

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## ≡ Standardise quotation structure

Agree:

- standard sections;
- approved descriptions;
- required review points;
- where exceptions are allowed.

This makes assisted quotation preparation safer and more useful.

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## ≡ Establish explicit statuses

Use a small set of meaningful process states.

For example:

- New
- Waiting for information
- Under review
- Qualified
- Quotation in preparation
- Quotation sent
- Follow-up due
- Won
- Lost
- Declined
- Inactive

The exact set should reflect the business.

The important point is consistency.

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## ≡ Define exception handling

Every automated process needs an answer to:

### What happens when the rules do not apply?

The answer should usually be a clear human escalation path.

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### — PRINCIPLE

**Automating unclear rules would make inconsistency happen faster.**

# What should not be automated yet?

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## End-to-end qualification

✕ DO NOT AUTOMATE

A system may assist with classification and present relevant information.

It should not independently decide whether every enquiry deserves commercial attention.

WHY

The decision is too dependent on context, capacity and judgement.

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## Dynamic pricing decisions

⏸ DO NOT AUTOMATE YET

Standard price information may be used in quotation preparation.

However, the business has not defined sufficiently clear rules for every pricing exception.

WHY

Automating undefined pricing judgement would transfer ambiguity into the automation rather than eliminate it.

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## Unusual enquiry responses

👤 KEEP HUMAN

Automatically generated replies may work for predictable missing information.

They are not appropriate for every unusual, sensitive or complex enquiry.

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## Automatic rejection of prospective customers

✕ DO NOT AUTOMATE

The business may eventually define objective cases that can be declined automatically.

At present, the cost of incorrectly rejecting a legitimate opportunity is greater than the administrative benefit.

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## Full quotation generation and sending without approval

✕ DO NOT AUTOMATE

Drafting assistance is reasonable.

Automatic commercial commitment is not.

Final pricing, scope and wording should remain subject to approval.

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# Recommended next actions

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## Now

### 1. Document the actual process

Confirm:

- where enquiries enter;
- who currently handles each step;
- where information is copied;
- where delays or ambiguity occur;
- which systems are involved.

Do not automate an assumed version of the process.

### 3. Define ownership and qualification rules

Distinguish:

- rules that can be automated;
- indicators that assist judgement;
- decisions that remain human.

### 5. Define statuses and exceptions

Establish a consistent process language before automating status changes.

### 2. Define minimum enquiry information

Create the smallest useful set of required information.

### 4. Standardise quotation structure

Identify:

- repeatable content;
- variable content;
- approval points;
- pricing decisions.

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## Next

### Pilot low-risk automation

Start with a limited set such as:

- structured enquiry capture;
- completeness checking;
- routine missing-information requests;
- follow-up scheduling.

Evaluate:

- reliability;
- employee usability;
- exception rate;
- whether manual effort actually falls;
- whether the process becomes clearer.

### Introduce routing rules selectively

Automate only where ownership rules are sufficiently clear.

Send ambiguous cases to a human.

### Add assisted quotation preparation

Once templates and approval rules are stable, test automated first-draft preparation.

Keep final review and commercial approval human.

## Later

Consider broader automation only after:

- process rules are stable;
- exceptions are understood;
- records are reliable;
- employees use the defined process consistently;
- the first automations demonstrate practical value.

Potential later areas may include:

- richer customer-system integration;
- more advanced routing;
- automated reporting;
- expanded quotation assistance.

These should be justified by observed needs, not by the existence of additional automation technology.

## RECOMMENDED IMMEDIATE DECISION

### **Do not attempt end-to-end automation.**

Standardise the process first.

Automate routine information capture, checks, routing and follow-up where the rules are clear.

Use automation to assist quotation preparation.

Keep commercial qualification, pricing exceptions and final approval with people.

# How the process was assessed

ActiveHub assesses automation opportunities at the level of individual process steps rather than assuming an entire process should be automated.

The assessment considers:

## Repetition

Does the same action happen frequently in a similar way?

## Input consistency

Does the step receive predictable information?

## Judgement required

Does the step depend on commercial, contextual or relationship judgement?

## Human review

Can a person realistically review the output before it matters?

## System dependency

Would automation require substantial new technical dependency or integration?

## Rule clarity

Can the decision be described clearly enough for consistent automation?

## Exception frequency

How often does the normal rule fail?

## Consequence of error

What happens if the automated action is wrong?

## Data sensitivity

Does the step involve confidential, sensitive or restricted information?

## Reversibility

Can the business test the change and return to the previous process if necessary?

### ASSESSMENT PRINCIPLE

**The best automation target is not necessarily the task that consumes the most attention. It is the task where repetition, rule clarity and controllability make automation genuinely useful.**

» Automation can:

- remove repetitive administration;
- move information;
- apply clear rules;
- generate drafts;
- schedule routine actions.

People should remain responsible where the process depends on:

- judgement;
- exceptions;
- accountability;
- commercial decisions;
- relationship context.

**The objective is not to maximise automation.**

**The objective is to design a better process.**