GUIDE · BEFORE YOU AUTOMATE

Measure your slowest step before you automate it

Four numbers, taken on one process beside the person who does the work. They tell you whether the work is worth automating and, later, whether it helped. You need a spreadsheet, your system's exports and the person who does the work.

Before you count

- Pick one process, the one where work waits: orders waiting to be quoted, invoices waiting to be matched, claims waiting for a decision. One process, not a department.
- Say what a case is (one order, one invoice, one claim), when it starts (the email arrives) and when it is done (the posting is made).
- Take the numbers from your systems, from the dates they record and their exports, not from memory, and sit beside the person who does the work while you do it.

The four numbers

1 Time per case, start to finish

What: from the moment a case arrives to the moment it is done, waiting included.

How: take every case that closed in your last full month from the dates in your system and use the middle value, not the average, so one stuck case does not swing it.

2 Cost per case

What: everyone's minutes on one case, priced at what each person costs an hour, plus any tool charged per case.

How: time each person's part on a few of that month's cases, beside them, waiting left out, and price it at what that person costs you an hour, including benefits and payroll taxes. If all you have is a salary, divide it by the hours the person is paid a year, 2,080 if you don't know them, and say so. That figure leaves out benefits and payroll taxes, so call it low.

3 Straight-through rate

What: of the cases that came in, the share that went through with nobody fixing, chasing or retyping anything after it arrived.

How: count the same month's cases. A case does not count as straight-through if anyone did anything to it by hand after it arrived, an approval included.

4 Hours a month

What: all the hours people spend on this process, from everyone who works on it.

How: from timesheets if you have them; if not, ask each person for their hours on it in a typical week, add them up, and multiply by 4.3 for the month. Then check it against that month's cases times the minutes from number 2. When the two disagree, the smaller one is usually missing someone.

What the numbers say

- A long time per case but few minutes of work: the work is waiting, not being worked. Look at what it waits on first, and if it waits on one policy, the fix is the policy, not an AI agent.
- A low straight-through rate: the cases people work on by hand are where the retyping, chasing and checking live. That is the work automation takes over.
- Few hours a month: not worth automating. That is a real answer, and the numbers are how you say it.

Write it down so it can be repeated

- One line per number: the value, how you got it, which system or export, which period, who measured it and when. Then what you did not measure, and why.
- Once something is built, take the same four numbers the same way, on a date you set now. The difference between the two is the result, and nothing else counts.

This guide is for work that arrives as cases: orders, shipments, invoices, quotes, claims, complaints. A standing decision, such as a production schedule or a stock position, does not arrive as cases. If that is your slowest step, we would rather talk it through than hand you a guide.

If you have taken the four numbers and want a second pair of eyes on them, send them to rui.luis@agentforgeworks.com.

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