The Monday Morning **Playbook.**

A field guide for identifying, diagnosing, and measuring your next agentic automation opportunity.

INSIDE THIS PLAYBOOK

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This is your playbook for diagnosing agentic processes across your enterprise. Learn the six symptoms and read through real-world examples for each. By the end, you'll know exactly where to start.

AUTOMATION ANYWHERE PATHFINDER

01

PART ONE

The Monday morning problem.

Why inspiration fades by Tuesday, and the tools that keep it from happening to you.

WHERE MOST PROGRAMS GET STUCK

Inspiration is easy. Taking the first step is the hard part.

You spent a few days at a conference surrounded by ideas that actually excited you. You saw what agents can do. You heard how your peers are driving real transformation. You left with a head full of possibilities.

The ideas are there, and you have great intentions. But without a clear starting point, most of it stays on the page or in your notebook. This playbook gives you the tools to move from "I should do something with this" to an actual first step: a process identified, evaluated, and ready to bring to the right conversation.

We're determined to make this year's Imagine different. If you're like us, your energy is buzzing. This playbook exists to help you transform that energy into momentum.

Automation Anywhere's platform and solutions are ready to handle complex processes. Your team is capable, especially with free training from Automation Anywhere University. The missing factor is a repeatable way to surface the right opportunity, evaluate it quickly, and walk into a conversation with something concrete.

THREE RESOURCES, IN ORDER

As you read through each symptom and provided example use cases, make note of where you see these same patterns in your own organization. By the last page you'll have a diagnostic lens, a measurement framework, and a clear path to your first conversation.

AUTOMATION ANYWHERE PATHFINDER

02

PART TWO

Two categories. Six symptoms.

If you can recognize them in a process, you don't need someone to tell you it needs an agent.

The signals that are hard to ignore.

Some processes need an AI agent. The ones that do tend to show the same patterns regardless of industry, function, or department. **Primary symptoms** are clear signals; one is enough. **Secondary symptoms** are an indicator to do a deeper cost-benefit analysis.

PRIMARY SYMPTOMS · ONE IS ENOUGH

If your process shows just one of these, you likely need an AI agent.

01 Ambiguous or Variable Input
You don't know what's coming before it arrives — or what form it will take.

02 Contextual Accumulation
What you discover mid-process changes what you do next.

03 Multi-Source Synthesis
No one system or person could make this call alone.

SECONDARY SYMPTOMS · WORTH A CLOSER LOOK

One or more of these tips the cost-benefit toward an AI agent.

04 Exception-Heavy Process
30%+ of cases need judgment, not just rule execution.

05 Volume Exceeds Capacity
You're sampling when you could — or should — be covering 100%.

06 Complex or Evolving Logic
The rules are deeply nested, complex, or change frequently.

PRIMARY SYMPTOM 01

Ambiguous or variable input.

The process begins without a consistent, predictable signal. Work that arrives carries no guaranteed structure, format, or intent. Every case requires interpretation before it can be acted on, and that interpretation cannot be automated with rules because the variation is too wide and too unpredictable to map in advance.

- Input arrives in unpredictable formats
- Structure and fields vary case-by-case
- Requires interpretation, not just parsing

THE TEST

"Do you know what's coming, and how it's formatted, before it arrives?"

IF THE ANSWER IS NO → YOU NEED AN AGENT.

WHAT THIS LOOKS LIKE

A customer-service inbox that won't sit still.

A customer service team receives hundreds of emails a day. Some report a billing issue. Some ask a product question. Some do both in the same sentence. Some are three words. Some are three paragraphs. Before anyone can route, respond, or resolve, someone has to read each one and figure out what it actually *is.* Multiply that across every channel, every language, and every customer type — and the interpretation work alone becomes a significant operational burden. One a well-configured agent handles faster, and more consistently, than any queue, enabling you to move more quickly from customer inquiry to customer resolution.

OTHER USE CASES FOR THIS SYMPTOM

01 **HR helpdesk requests** — "I have a question about my benefits" could mean parental leave, 401k, health coverage, or a life event change. The same four words could require a knowledge response, a system action, or an escalation to HR. A rules-based router can't make that call, but an agent can read the intent and route accordingly.

02 **Insurance claims** — Claims arrive with varying documentation, photos, witness statements, and coverage questions attached, all in different formats. Before anyone can assess liability or initiate a payout, someone has to interpret the claim information. An agent can handle that interpretation consistently, at volume, without a queue.

03 **Travel & expense requests —** Employees submit receipts, notes, and explanations in inconsistent formats with varying levels of detail. Some are complete. Some are missing documentation. Some need policy clarification before they can be approved. An agent can read each submission and routes it to the right next step.

PRIMARY SYMPTOM 02

Contextual accumulation.

The process can't be fully mapped in advance because each step changes what the next step should be. New information discovered mid-process alters the direction, scope, or nature of the work. A complete flowchart is impossible to draw before the work begins — the path becomes clear only as it unfolds.

- Next steps depend on what was discovered in previous steps
- Can’t create a complete flowchart upfront
- Each discovery reshapes problem understanding

THE TEST

"Could you draw the full flowchart before the work begins?"

IF THE ANSWER IS NO → YOU NEED AN AGENT.

WHAT THIS LOOKS LIKE

Transaction failure investigation.

A payment doesn't process. To the customer it's a frustration. To the business it's a receivables problem — and at scale, unresolved payment failures have a direct and measurable impact on days sales outstanding and operating cash flow. An agent doesn't just resolve the ticket. It identifies whether the failure is isolated or systemic, an outage issue or a business rule that was violated, escalates when needed, and closes the loop faster than any queue-based process could. Every hour a payment failure goes unresolved is an hour that cash isn't moving and customers may be having a poor experience.

OTHER USE CASES FOR THIS SYMPTOM

01 **Equipment failure root cause** — a sensor alert points to one component, which leads to a supplier batch check, which reveals a fleet-wide pattern. Root cause turns out to be a design flaw the original alert never suggested.

02 **IT support ticket investigation** — “I can’t log in” sounds like a password reset, but checking the access log surfaces three failed attempts from an unrecognized device — what started as an IT fix becomes a security escalation that no one could have predicted from the original ticket.

03 **Regulatory inquiry response —** a regulator asks about one transaction. Pulling the record surfaces a related account with a compliance flag tied to a mid-year policy change. The original question becomes a much larger disclosure conversation.

PRIMARY SYMPTOM 03

Multi-source synthesis.

Reaching the right decision requires pulling information from multiple, separate systems and reading them in relation to each other. Each source tells part of the story. The decision becomes clear only when the full picture is assembled — and assembling that picture requires judgment, not just retrieval.

- Synthesizing information from 2 or more sources
- Need to understand how sources relate
- Context from one source impacts another

THE TEST

"Could one system or one person make this call alone?"

IF THE ANSWER IS NO → YOU NEED AN AGENT.

WHAT THIS LOOKS LIKE

A $47,000 invoice that only looks routine.

A vendor invoice arrives for $47,000. The amount matches the purchase order. The vendor is approved. But cross-referenced against the receiving log, only 60% of the order has been confirmed delivered. Checked against the contract, partial invoicing requires a signed delivery acknowledgment — which hasn't been submitted. Reviewing vendor history, the same pattern appeared twice in the last two quarters. The right action is clear: hold the invoice, request the acknowledgment, flag the vendor account for review. None of those three steps were visible from any single system. The agent reached the conclusion by reading all of them, together.

OTHER USE CASES FOR THIS SYMPTOM

01 **HR hiring decision** — background check, references, skills assessment, and compensation benchmarking all run independently. No single signal is disqualifying alone; the decision requires weighing them all together.

02 **Patient treatment recommendation** — clinical history, lab results, active medications, and allergy records all live in separate systems. The right treatment path requires reading all of them simultaneously — any single source alone creates risk.

03 **Sales proposal and pricing optimization** — product configuration, customer history, competitive positioning, and margin thresholds all live in separate systems. An agent assembles the full picture instantly and surfaces the optimal proposal — the one most likely to win without leaving margin on the table.

SECONDARY SYMPTOM 01

Exception-heavy process.

- Significant volume requires contextual decision-making
- Can’t be solved with more conditional branches/logic
- Judgement calls, not binary rule execution

When more than 30% of cases require human judgment rather than rule execution, the process has outgrown its automation design. Exceptions are no longer edge cases — they *are* the workload. More conditional logic adds complexity without solving the underlying problem.

THE TEST

”What percentage of cases actually follow the standard path?”

IF THE ANSWER MAKES YOU UNCOMFORTABLE → YOU NEED AN AGENT.

WHAT THIS LOOKS LIKE

When the rules don’t cover everything

A procurement team built a solid workflow for standard purchase requests. But 45% of the volume involves something the rules didn't cover: emergency purchases, sole-source justifications, cross-departmental spend. Each one gets escalated, creates backlog, and pulls a senior team member away from higher-value work. The queue never gets shorter.

OTHER USE CASES FOR THIS SYMPTOM

01 **Commercial insurance renewals** — underwriters built rules for standard policies, but mid-market accounts rarely qualify. Unusual property types, mixed-use classifications, and non-standard coverage requests mean most renewals require human judgment. The "standard" path is the exception.

02 **Return Merchandise Authorization**— straightforward returns process fine. But damaged goods with partial use, items outside the return window with extenuating circumstances, and bulk returns from enterprise accounts all require someone to read the situation and decide. Exception volume has outpaced the rules that were supposed to handle them.

SECONDARY SYMPTOM 02

Volume exceeds capacity.

- Should review 100%, have to settle for sampling
- Strategic importance, but insufficient human capacity
- Volume-to-impact ratio makes comprehensive coverage infeasible

The work that needs to happen is impossible to cover with the staff available. Teams respond by sampling, reviewing a portion and assuming the rest is fine. This creates a structural gap between the coverage a process requires and the coverage it actually gets.

THE TEST

"Are you sampling when you should be covering 100%?"

IF THE ANSWER IS YES → YOU NEED AN AGENT.

WHAT THIS LOOKS LIKE

The supervision requirement was never fully achievable

Financial firms are required under FINRA to supervise advisor-client communications and flag potential complaints, unsuitable recommendations, or policy violations. In practice, most firms review 5-10% of communications because 100% coverage has always been operationally impossible. An agent changes this entirely: every communication gets reviewed, violations get flagged consistently, and the same pass that checks for compliance also surfaces coaching opportunities and upsell signals the firm was never capturing before. The regulation always intended 100%. Now it's actually achievable

OTHER USE CASES FOR THIS SYMPTOM

01 **Contract obligation tracking** — legal teams monitor active contracts for milestone deadlines, renewal windows, and obligation triggers. In practice, only the highest-value contracts get consistent attention. The rest get reviewed when something goes wrong. An agent covers the full portfolio, not just the ones that made someone's priority list.

02 **Credit card dispute investigation**— most issuers only investigate disputes above a dollar threshold. Below it, the math doesn't work for human review. But low-value transactions are where coordinated fraud patterns hide — fraudsters know the thresholds and stay under them deliberately. An agent investigates every dispute and surfaces the patterns no individual transaction would ever reveal.

SECONDARY SYMPTOM 03

Complex or evolving logic.

The rules change frequently enough that keeping automation current becomes a significant ongoing cost. The maintenance burden quietly erodes ROI, and the team managing the logic becomes a bottleneck every time something changes.

- Rules are nested, multi-conditional, and hard to map exhaustively
- Underlying policies, regulations, or business rules change frequently
- Every update requires a developer to go back in and rewire logic

THE TEST

"How many times did someone have to rebuild this logic in the last 12 months?"

IF THE ANSWER IS MORE THAN ONCE → YOU NEED AN AGENT.

WHAT THIS LOOKS LIKE

The classifier that costs more to maintain than the process it replaced

A trade compliance team manages HTS code classification for imported goods. Duty rates shift. Exclusions expire. Reciprocal tariffs get announced, paused, and reinstated, sometimes within the same month. Their two-year-old rules-based classifier has been updated 23 times. Each update requires testing, validation, and redeployment. The cost of keeping it current has long since exceeded the cost of the manual process it replaced. An agent handles it through reasoning against current policy documents rather than hard-coded logic. When the rules change, you update the document. Not the bot.

OTHER USE CASES FOR THIS SYMPTOM

01 **Procurement approval routing**— spend limits, approval chains, and category rules shift with every budget cycle and org restructure. The bot gets updated, tested, and redeployed. By the next quarter it's quietly wrong again — and nobody knows until an approval slips through that shouldn't have.

02 **Tax filing accuracy**— tax code runs hundreds of pages and changes constantly. Hard-coded logic requires retesting and redeployment with every regulatory update. An agent reasons against the current code directly — uncovering filing inaccuracies and savings that rules-based automation was never designed to find.

You know the symptoms. Make the diagnosis.

Run your process through the symptom checklist and apply the recommendations below. Remember: a diagnosis applies to a step or a handoff, not always the whole process. Deterministic automation and agents coexist in the same workflows.

DIAGNOSIS A

Needs an agent.

1 or more primary symptom present.

What it means. Your process requires reasoning, not just execution — and more conditional logic won't change that.

Next step. Start scoping the agentic workflow. Identify which steps require reasoning and which your existing automation can already handle. Some steps will stay deterministic — and that's by design.

DIAGNOSIS B

Could use an agent.

1 or more secondary symptom present.

What it means. You have enough signal to investigate, but not enough to commit.

Next step. Three numbers will tell you whether an agent makes sense: the cost of maintaining the current logic, the cost of a missed exception, and the percentage of team capacity going to upkeep rather than execution.

DIAGNOSIS C

Agent is overkill.

No symptoms present.

What it means. Confirm the process is genuinely stable: input arrives in a consistent, predictable format, and the logic governing decisions doesn't shift frequently.

Next step. If both are true, a combination of automations and intelligent automations with AI Skills is the right fit - and built for exactly this kind of work.

AUTOMATION ANYWHERE PATHFINDER

PART THREE

03

Measure what leaders actually care about.

Notice something about the use cases we just highlighted for each symptom? Exception-heavy workflows. Transactions that fail and stall cash flow. Decisions that require synthesizing data across five systems. These go beyond cost-savings stories. They're revenue stories, compliance stories, customer experience stories. Measuring them with hours saved means systematically undervaluing them, and undervalued processes don't get prioritized.

THE AIM FRAMEWORK

Stop measuring impact like it's 2018.

Automation taught us to measure success one way: hours saved, headcount avoided. That still matters — but look back at the six symptoms you just worked through. Exception-heavy processes. Volume that exceeds capacity. Contextual accumulation. Decisions that require synthesizing data across systems.

These processes sit at the heart of revenue, compliance, customer experience, and organizational health — not on a cost-savings spreadsheet.

Measuring them the old way means systematically undervaluing them. And undervaluing them means they don’t get the prioritization that they deserve.

Introducing The Agentic Impact Measurement (AIM) Framework

The Agentic Impact Measurement (AIM) Framework gives you three pillars — and nine value categories within them — enable you to capture the complete, multi-dimensional benefits if your solution and tell the right story to the right stakeholder.

01 Financial & Operational

The familiar lens — extended. Most teams stop at hours saved or headcount avoided. The stronger story lives downstream.

02 Risk & Quality

Where agents change the math entirely — and where the volume-exceeds-capacity symptom becomes a financial argument.

03 Strategic & Organizational

The metrics that turn an automation program into an organizational priority — not just an IT initiative.

Three pillars. Nine value categories.

Each pillar speaks a different stakeholder's language. Use them together to build a complete impact case.

PILLAR 01

Financial & operational

Most programs report cost savings and stop there. Revenue generation and cash flow impact are rare — and when you can demonstrate them, you're no longer having a cost-center conversation. You're having a strategy conversation.

- Direct cost savings
- Revenue generation
- Cash flow

Key stakeholders

CFO, CEO, COO, finance teams

PILLAR 02

Risk & quality

This is where agents change the math completely. Software costs avoided. Licenses displaced. And when agents finally close the coverage gaps that sampling never could — compliance exposure and audit findings drop in ways that rules-based automation simply couldn't deliver.

- Information technology
- Operational efficiency & scalability
- Audit, risk & compliance

Key stakeholders

CRO, CIO, CTO, compliance, operations

PILLAR 03

Strategic & organizational

These are the metrics most automation programs never bother to consider. Customer experience. Employee satisfaction. Retention. When your automation program shows up in those conversations, it stops being an IT initiative and starts being an organizational priority.

- Customer & partner experience
- Employee experience
- Environmental & social impact

Key stakeholders

CEO, CHRO, CXO, CSR teams

PILLAR 01 – FINANCIAL & OPERATIONAL

Most programs report hours saved and stop there.

WHO CARES?
CFO, CEO, COO, CRO, Finance teams

... not because revenue and cash flow impact isn't there, but because nobody asked the right questions. Did close rates improve? Did money move faster through the business? Did freed capacity unlock new revenue? If you're not asking, you're probably underreporting. This pillar is where you follow every thread until you find the real number

Direct cost savings

What does this remove, not just reduce?

Overtime eliminated | Contractor spend reduced | Operational expenses decreased

The strongest cost savings story is elimination: a process that no longer requires headcount, overtime, or contractor spend. Hours saved is a start. The real number is what you stopped paying for entirely. Know the difference: *cost savings* is the direct removal of a standing expense (e.g., headcount reduced, contracts cancelled, operational spend eliminated). *Cost avoidance* is what you didn't have to spend because automation absorbed the growth (e.g., the hire you never made, the system you never bought, the contractor you never brought in). Both count. Both belong in your business case.

Revenue generation

Does this solution let us sell more, close faster, or sell to more people?

Sales cycle time | Improved close rate | New service offerings enabled

This is the value most programs miss entirely, not because it isn't there, but because nobody went looking. Did close rates improve because reps had better information faster? Did cycle times drop because proposals moved without manual steps? Did capacity freed up by automation let your team take on more accounts? Follow these questions. The number you find there changes who you're talking to and what they're willing to invest.

Cash flow

Does this change how quickly money moves through the business?

Cash conversion cycle | Operating cash flow improvement | Days sales outstanding (DSO)

Automating invoicing, collections, or payment processing has a direct and measurable effect on working capital, and these are metrics that land immediately with finance leadership. If your automation touches anything near the order-to-cash or procure-to-pay cycle, there's almost certainly a cash flow story here worth telling.

PILLAR 02 – RISK & QUALITY

This is where agents change the math completely.

WHO CARES?
CIO, CTO, CSO,
GRC teams, operations

Software costs avoided. Licenses displaced. And when agents finally close the coverage gaps that sampling never could — compliance exposure and audit findings drop in ways that rules-based automation simply couldn't deliver.

Information technology

What license do we not have to buy and what risk do we not have to carry?

License displacement | Security incident reduction | Audit trail coverage

The IT value story has two sides. The first is displacement — software avoided, licenses eliminated, legacy systems retired because automation absorbed what they were doing. The second is risk reduction — automated access controls that close security gaps, audit trails that didn't exist before, monitoring that runs continuously instead of reactively. Both belong in your business case, and both tend to get left out.

Operational efficiency & scalability

Does this fuel capacity growth without adding headcount?

Cycle time reduction | Volume handled with flat headcount | Straight-through processing rate

When transaction volume doubles and your team stays the same size, that delta has a dollar value. This category captures the capacity math — not just what got faster, but what your operation can now handle that it couldn't before. Cycle times, throughput, straight-through processing rates — these tell the story of a program that isn't just automating tasks, it's changing the economics of how the business scales.

Audit, risk & compliance

What are we missing by only reviewing a fraction of what we process?

Controls automated | Compliance violations reduced | Audit findings reduced

Sampling is a concession, not a strategy. Organizations review 5-10% of transactions because 100% coverage has always been operationally impossible — until now. Full coverage doesn't just reduce compliance exposure. It surfaces patterns, anomalies, opportunities, and insights that a sampled review would never find. The value isn't only in what you prevent and avoid. It's in what you discover.

PILLAR 03 – STRATEGIC & ORGANIZATIONAL

Most automation programs never make it this far.

WHO CARES?
CEO, CHRO, CXO,
ESG team, CSR teams

Customer experience. Employee satisfaction. Retention. When your program shows up in those conversations, it stops being an IT initiative and starts being an organizational priority.

Customer & partner experience

Does this agentic solution change what it feels like to be our customer?

Customer response time reduction | CSAT/NPS improvement | First call resolution rates

Speed and consistency are the two things customers notice most — and both are directly impacted by AI and automation. Faster response times, fewer escalations, higher first-call resolution rates. These aren't soft metrics. They show up in NPS, in renewal rates, and in the conversations your customer success team has every day. If your agentic solution touched a customer-facing process, there's almost certainly a satisfaction story here.

Employee experience

Does change what it feels like to work here?

Turnover rate improvement | Mandatory overtime reduced | Employee satisfaction scores

The work nobody wants to do — repetitive, manual, low-judgment — is exactly what agentic process automation is best at eliminating. When that work disappears, something else happens: people have time for the work that actually requires them. Satisfaction scores improve, overtime drops, and the argument for agentic process automation starts coming from employees themselves rather than just leadership.

Environmental & social impact

Can we connect our efforts to the organization's broader commitments?

Paper eliminated | Carbon emissions reduction | Accessibility measures

This category rarely makes it into an automation business case — and that's a missed opportunity. Paper eliminated, energy consumption reduced, accessibility improved. These metrics matter to CSR teams, to board-level ESG reporting, and increasingly to customers and employees who want to work with organizations that take these commitments seriously. Want a new key strategic stakeholder in your org? Care about what your environmental, social, and governance (ESG) team cares about.

YOUR NEXT MOVE

You have the **inspiration.** Now take the **first step.**

You've worked through a diagnostic framework for identifying the right processes for agentic automation, a way to evaluate what you find, and a measurement lens for telling the impact story in language that resonates with the people who matter.

The triage worksheet on the next page is where this comes together. Work through 4-5 processes, let the prioritization emerge from the pattern, and walk into a conversation with something concrete.

Use the triage worksheet on the next page to work through your first process before you close this playbook.

YOUR ACTION PLAN

01 Pick a process and analyze it through the triage worksheet

Find a process in your backlog to analyze for primary and secondary symptoms. Just one. Be sure it's a process and not a task. Ask yourself, "what comes before this?", "what comes after this?", and "what happens during this?" to understand the full scope.

02 Repeat for 4-5 more processes

Build enough of a picture that prioritization becomes obvious rather than arbitrary.

03 Prioritize the strongest candidate

The one with the clearest symptom signal and the impact categories that map to what your key stakeholders and your business care the most about.

04 Book a conversation

Arrive with the process, its diagnosis, and the impact story framed around the outcomes that stakeholder has on their scorecard. That means going beyond "here's an automation idea". Be ready to show them what it could mean for their business and the metrics they care about.

The Monday Morning **Triage.**

Start here. List the ideas you're considering, evaluate each against the symptoms, give it a diagnosis, and tag the metrics it will impact. The first row is filled in with an example.

PROCESS & FUNCTION	WEEKLY VOLUME	DIAGNOSIS	PRIMARY SYMPTOMS	SECONDARY SYMPTOMS	AGENTIC IMPACT METRICS	
Vendor invoice approval Finance · Accounts payable	~1,200 PER WEEK	[x] Needs agent [ ] Could use one [ ] Overkill	[ ] Ambiguous input [ ] Contextual accumulation [x] Multi-source synthesis	[x] Exception-heavy [ ] Volume exceeds capacity [ ] Evolving logic	[x] Direct cost savings [x] Cash flow [ ] Operational efficiency & scalability [ ] Customer & partner experience [ ] Environmental & social impact	[ ] Revenue generation [ ] Information technology [x] Audit, risk & compliance [ ] Employee experience
		[ ] Needs agent [ ] Could use one [ ] Overkill	[ ] Ambiguous input [ ] Contextual accumulation [ ] Multi-source synthesis	[ ] Exception-heavy [ ] Volume exceeds capacity [ ] Evolving logic	[ ] Direct cost savings [ ] Cash flow [ ] Operational efficiency & scalability [ ] Customer & partner experience [ ] Environmental & social impact	[ ] Revenue generation [ ] Information technology [ ] Audit, risk & compliance [ ] Employee experience
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Go **Build** Something

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