

AI Agent Suitability Scorecard

Instructions for use

Use this scorecard to evaluate which of your tasks are best suited for automation using an AI agent. Run each process you're considering to automate through this scorecard. For each dimension, assess the process on a scale of 1 (low suitability/poor fit) to 5 (high suitability/excellent fit) for AI agent deployment.

Tally the scores across all dimensions. Processes with the highest overall scores—especially those scoring highly on data quality and decision clarity—are the best candidates for initial AI agent automation. These tasks are positioned to yield the greatest return on investment by leveraging the advanced cognitive and decision-making capabilities of AI agents. Focus on moving tasks from transactional to strategic by offloading high-frequency, complex workflows.

Dimension	Ask yourself...	What it means (agentic value)	Scoring guidance
1. Process predictability	Are the steps clear, defined, and repeatable every time?	The more consistent the core process, the easier it is to automate. However, the AI Agent's value is highest when it needs to handle the variations or exceptions within that repeatable framework.	1 Every case is completely unique. 5 Steps are highly consistent with defined exceptions.
2. Frequency & volume	Does this task happen often enough to justify the setup time?	High-volume, recurring processes create the fastest ROI. The more times the process runs, the greater the time and cost savings.	1 Rarely or once a year. 5 Daily/weekly, high volume, or impacts many employees.
3. Data quality & structure	Is the data digital, accurate, and structured (e.g., fields in a database) or is it mostly unstructured (e.g., emails, PDFs, notes)?	Clean, accessible data is foundational. The AI Agent's unique strength is its ability to extract meaning and context from unstructured data (like resumes or employee feedback forms).	1 Data is messy, missing, or siloed on paper. 5 Data is digital, accurate, and often unstructured (which an agent can interpret).
4. System environment	Are the necessary tools and integrations stable and accessible?	Stable systems are preferred. The agent's value increases when it needs to bridge disconnected systems (e.g., retrieving data from one tool and summarizing it in an email) or adapt to loosely structured data sources.	1 Systems are unstable or require manual sign-ons. 5 Systems are connected, or the agent can reliably access and interact with them.
5. Decision clarity	Does the task require judgment, interpretation, or context rather than a simple "if X, then Y" rule?	Process automation follows clear rules ("if X then Y"). AI agents handle nuance, complex interpretation, prioritization, and decision-making based on probabilities and context.	1 Decisions are simple, rule-based logic only. 5 Decisions require sophisticated contextual reasoning or trade-offs.
6. Human-centric need	How much empathy, sensitive dialogue, or specialized human judgment does it require?	Empathy-heavy or high-stakes legal/ethical tasks should remain human-led. The agent's role should be to draft, assist, or prepare information for the human interaction, not replace it.	1 This requires significant emotional intelligence or legal interpretation. 5 Purely administrative, data-driven, or preparatory work.