



AI Automation Opportunity Audit

A worked example of how to screen automation opportunities and define the next discovery step.

Scenario

A fictional regulated operations team has a backlog of manual work across document intake, exception handling, compliance review, customer updates, and management reporting. The demonstration uses synthetic inputs only.



What a scoped audit should produce

- Workflow inventory with owners, systems, volumes, failure modes, and controls.
- Qualitative screening across impact, feasibility, risk, data readiness, and time to value.
- A proposed reference architecture with approval gates, audit logging, monitoring, and fallback paths.
- Pilot charters with acceptance criteria, responsibilities, delivery milestones, and cost controls.

Qualitative screening example

Workflow	Impact	Feasibility	Risk	Readiness	Time to value	Next action
Document intake and classification	High	High	Medium	High	Not estimated	Candidate pilot 1
Customer status updates	Medium	High	Low	High	Not estimated	Candidate pilot 2
Compliance evidence assembly	High	Medium	High	Medium	Not estimated	Design with human approval
Management reporting	Medium	High	Low	Medium	Not estimated	Consider after first pilot
Autonomous exception resolution	High	Low	High	Low	Not estimated	Do not automate yet

No weights or numerical scores are applied. Time to value remains unestimated in this fictional example; resolve it before committing to either candidate pilot.

Reference architecture

Sources	Orchestration	Controls	Outcomes
Email Forms Documents CRM	Queue Classifier Rules Agent tools	Approval gates Audit log PII policy Fallback	Structured records Notifications Exceptions Metrics

Illustrative pilot acceptance criteria

- Every ingested item produces either a valid structured record or a routed exception.
- Every automated action records source, model or rule version, decision, approval state, and final disposition.
- High-risk classifications require human approval; irreversible actions are not autonomous.
- The pilot can be disabled without data loss and has a documented manual fallback.

Evidence note

Original Axtryll demonstration created September 4, 2026; wording revised September 19, 2026. Fictional inputs only. No client engagement, client data, testimonials, or measured business results are claimed.