



EXAMPLE SOP / HUMAN-EXECUTED WORKSHOP

Facilitate an Automation Opportunity Workshop

An illustrative operating document showing how a workshop can move from business outcomes to an evidence-backed pilot decision.

ILLUSTRATIVE EXAMPLE - NOT THE AITOC WORKSHOP

This document shows how an SOP can structure an automation opportunity workshop. It is not AITOC's actual workshop, facilitator playbook, or a self-service replacement. Names, timings, prompts, scoring interpretation, and decision logic have been simplified or adapted.

THE EXAMPLE OPERATING PATH

01 ALIGN	02 INVENTORY	03 SCREEN	04 VALIDATE	05 PRIORITIZE	06 PILOT
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WHAT THIS EXAMPLE DEMONSTRATES

How outcomes, evidence, feasibility, risk, prioritization, and a bounded pilot can become one auditable operating path.

WHAT IT DOES NOT PROVIDE

The actual AITOC workshop, facilitator calibration, ROI interpretation, diagnostic prompts, benchmarks, or recommendation rules.

Use this file to study SOP structure. Do not use it to run or reproduce the AITOC workshop.

Document control

Field	Value
SOP ID	EXAMPLE-AOW-001
Process owner	Example Workshop Lead
Approved by	Example Engagement Owner
Version	1.0
Effective date	2026-07-24
Status	Illustrative training example
Classification	Example only - not for operational use

1. Purpose

Turn cross-functional knowledge about the business into an evidence-based automation roadmap.

The workshop is successful when the team leaves with:

1. a ranked shortlist of automation opportunities;
2. evidence and confidence recorded behind the ranking; and
3. one or two bounded pilot charters with owners, measures, guardrails, and next actions.

The outcome is a decision about **where to investigate or pilot first** - not a promise that every repetitive task should be automated.

2. Scope

Use this SOP to assess automation opportunities across one company, business unit, or defined operating area.

The workshop includes:

- alignment on business goals and constraints;
- process and friction-point inventory;
- consistent opportunity screening;
- baseline and ROI input collection;
- feasibility and risk review;
- value-versus-effort prioritization; and
- pilot definition.

The workshop does not authorize production access, select a vendor, approve a final solution architecture, or replace technical, security, financial, legal, or compliance review.

3. Trigger and entry conditions

Start when the executive sponsor and Workshop Lead agree on the operating area and the decision the workshop must support.

Before scheduling, confirm:

- one decision owner is named;
- two or three important business outcomes are stated;
- relevant constraints are known or assigned for discovery;
- process owners and cross-functional representatives can attend;
- available baseline data has been requested; and
- participants understand that the session starts with business work, not AI tools.

If the decision owner, scope, or business outcomes are missing, stop and resolve them before inviting the wider group.

4. Roles and responsibilities

Role	Responsibility
Executive sponsor	Defines the business decision, resolves priority conflicts, and owns the next-step commitment
Workshop Lead	Facilitates the example method, challenges unsupported claims, and controls the final synthesis
Process owners	Explain triggers, handoffs, exceptions, volumes, failure points, and current controls
Finance or commercial representative	Tests cost, capacity, revenue, and value assumptions
Data, IT, security, or compliance representative	Tests data availability, system access, integration, safety, and policy constraints
Recorder	Maintains the opportunity register, evidence links, decisions, owners, and unresolved questions

Recommended attendance is 8-12 people. If the group is larger, split discovery by operating area and reconvene for prioritization.

5. Required inputs and workspace

- Workshop board or digital collaboration space
- Opportunity register and scoring sheet
- Approved ROI model, used by the facilitator
- Process volumes and time-per-execution estimates
- Error, rework, delay, SLA, and customer-friction evidence
- Current people, tools, systems, and handoffs
- Known security, compliance, contractual, and customer constraints

Each material claim must be marked as **verified fact**, **estimate**, or **unknown** and linked to an owner or source.

6. Quick conclusion

Goal: Identify where automation can create meaningful business value without hiding feasibility, risk, or uncertainty.

Proof: A comparable opportunity register, evidence-backed shortlist, prioritization map, and one or two pilot charters.

Critical action chain: Align outcomes -> map work -> screen consistently -> validate evidence -> test feasibility -> prioritize -> design a bounded pilot.

7. Procedure

Step 1 - Prepare the decision

1. Confirm the operating area and decision owner.
2. Write the two or three business outcomes the workshop must support.
3. Record non-negotiable constraints such as compliance, customer promises, labor commitments, security, and delivery deadlines.
4. Invite process owners plus finance, commercial, IT, data, security, or compliance representatives relevant to the scope.
5. Request available data before the session: volume, handling time, waiting time, error rate, rework, cost, SLA performance, and revenue or capacity impact.
6. Prepare one opportunity register for the whole group.

Exit check: The workshop has a decision to support, not merely a topic to discuss.

Step 2 - Set the stage (20 minutes)

1. State that the goal is to find where automation makes business sense - saving time or cost, reducing risk or errors, increasing capacity, or improving customer and team speed.
2. Confirm the business outcomes and constraints with the group.
3. Explain that ideas will be compared through the same lenses.

4. Explain that unsupported estimates remain visible as assumptions.
5. Confirm the end product: a shortlist and a plan to test the strongest opportunities.

Control: Do not begin with preferred tools, vendors, or solutions. They anchor the group before the work is understood.

Step 3 - Build the process inventory (60 minutes)

1. Ask participants to silently identify tasks or workflows that consume time, frustrate staff or customers, fail frequently, create delays, or repeat at meaningful volume.
2. Cluster related tasks into workflows.
3. For every candidate, record:
 - trigger and expected output;
 - responsible roles and handoffs;
 - systems or documents touched;
 - frequency or volume;
 - typical handling and waiting time;
 - common errors, exceptions, or rework; and
 - current business or customer impact.
4. Merge duplicates without removing disagreements.
5. Keep unclear candidates in the register with an evidence gap.

Exit check: Every candidate describes real work with a trigger and output, not a vague ambition such as "use AI in sales."

Step 4 - Screen through the six opportunity lenses (60 minutes)

Score every candidate from 0-5 through the same six illustrative lenses:

Lens	Question
Revenue or capacity	Could this help win, retain, serve, or support more customers?
Real cost	Could this remove meaningful labor, tool, delay, or rework cost?
Automation feasibility	Is the work repetitive, rule-governed, observable, and sufficiently stable?
Customer and team speed	Could it shorten waiting time or remove operational friction?
Safety and quality	Could it reduce errors, inconsistency, compliance exposure, or missed controls?
Scale and data	Could it support growth without proportional headcount and improve decision data?

For each score:

1. record the evidence or reasoning;
2. mark confidence as verified, estimated, or unknown; and
3. flag rare work, unclear rules, unstable processes, sensitive decisions, or high human-touch requirements.

Control: The six-lens score is a screening signal, not an automatic decision. A high total cannot override a critical risk or missing evidence.

Step 5 - Validate baseline and value inputs (30 minutes)

For the stronger candidates, record:

- handling time per execution;
- executions per month or year;
- waiting time and SLA effect;
- average cost of mistakes, delay, or rework;
- roles and tools currently required;
- capacity, retention, or revenue impact where supportable; and
- source, owner, date, and confidence for each input.

The Workshop Lead applies the approved ROI model. If an input cannot be supported, show a range or mark it unknown; do not convert optimism into a precise financial claim.

Step 6 - Test feasibility and ownership (90 minutes)

For each leading candidate, determine:

1. whether the required data exists, is usable, and may be accessed;
2. whether rules are explicit and stable enough to test;
3. whether systems can exchange information through an approved interface;
4. how often exceptions occur and who resolves them;
5. which decisions must remain human-controlled;
6. which security, privacy, compliance, or customer risks apply; and
7. who owns the process, data, pilot, and resulting operational change.

Decision:

- Continue when the opportunity has meaningful value, a testable route, and an accountable owner.
- Hold when evidence, rules, access, or ownership is missing.
- Reject or redesign when the proposed automation would create unacceptable risk or automate a broken process.

Focused context pack - validate one candidate

Context field	Required local context
Trigger and input	Candidate has passed the first screening with evidence gaps visible
Responsible role	Workshop Lead with process, finance, and technical owners
Exact location	Opportunity register, source records, and current process systems
Local evidence	Volume, time, errors, cost, delays, rules, exceptions, data, and access constraints
Decision threshold	Enough value and feasibility evidence to justify comparison or a bounded test
Risk and control	Separate facts from estimates; critical risk blocks automatic promotion
Output and proof	Evidence-backed candidate record with confidence, owner, risks, and next decision

Step 7 - Prioritize the portfolio (45 minutes)

1. Place candidates on a value-versus-effort/risk map.
2. Classify them:
 - **Do now:** high-value candidates with a credible, lower-risk route to testing;
 - **Do next:** high-value candidates that require more evidence, redesign, access, or change work;
 - **Park:** low-value, poorly timed, or insufficiently evidenced candidates.
3. Compare dependencies and change load.
4. Select one or two candidates for pilot design.
5. Record why other attractive ideas were not selected.

Control: Prioritize the smallest credible route to proven value, not the most impressive demonstration.

Step 8 - Design the bounded pilot (45 minutes)

For each selected candidate, define:

- **Hypothesis:** the observable change expected;
- **Baseline:** the current measure and evidence source;
- **Scope:** one region, team, process segment, or approximately 20-30% of suitable volume;
- **Measures:** time, cost, error, quality, capacity, or experience signals;
- **Duration:** normally 4-8 weeks, adjusted to real operating volume;
- **Owner:** one person accountable for the decision and result;
- **Guardrails:** permissions, exclusions, human review, escalation, and stop conditions;
- **Evidence plan:** what will be logged and compared; and

- **Decision date:** when to expand, revise, or stop.

Exit check: The pilot can disprove its own hypothesis and can be stopped without uncontrolled operational impact.

Step 9 - Close the workshop (25 minutes)

1. Read back the shortlist, expected value, evidence confidence, and major risks.
2. Confirm the selected pilots and why they were chosen.
3. Assign owners and dates to every evidence gap and next action.
4. Confirm where the workshop records will live.
5. State that expansion happens only after measured value and safe operation are demonstrated.

8. Controls and escalation

Condition	Required action	Owner
Material claim has no source	Mark as estimate or unknown; assign validation	Recorder and claim owner
Participants disagree on the process	Preserve both accounts; inspect records or observe the work	Process owner
Critical security, legal, or compliance concern	Stop automatic promotion and assign specialist review	Executive sponsor
Rules or process change frequently	Redesign or stabilize before automation	Process owner
No accountable owner	Do not select for pilot	Executive sponsor
Pilot cannot be measured or safely stopped	Redesign before approval	Workshop Lead

9. Completion criteria and retained evidence

The workshop is complete only when the following are stored in the agreed location:

- business outcomes and constraints;
- process inventory;
- scored opportunity register with evidence confidence;
- baseline and value inputs for leading candidates;
- feasibility, ownership, and risk findings;

- value-versus-effort/risk map;
- one or two pilot charters;
- unresolved questions with owners and dates; and
- final sponsor decisions.

An attractive idea without evidence, ownership, or a measurable pilot is not a completed workshop output.

10. What this example intentionally omits

This public example intentionally does not include:

- exact scoring weights and calibration anchors;
- ROI formulas, cost assumptions, and confidence normalization;
- tie-break rules, red-flag interpretation, and recommendation thresholds;
- the diagnostic prompt sequence used to challenge workshop answers;
- benchmark comparisons and engagement-specific interpretation; or
- the final recommendation format used by AITOC facilitators.

The actual AITOC workshop uses its own facilitator playbook and may use different questions, calibration, sequencing, and decision logic. These omissions protect the quality of the service while still showing qualified leads how a well-structured workshop SOP can work.

11. Quality checks

Before releasing the example roadmap, the Workshop Lead verifies:

- business goals were defined before technologies;
- every shortlisted candidate represents a real workflow;
- the same six lenses were applied consistently;
- facts, estimates, and unknowns remain distinguishable;
- value claims have sources or visible ranges;
- feasibility includes data, rules, systems, exceptions, risk, and ownership;
- rejected or parked candidates retain a reason;
- pilots include a baseline, measurable target, guardrails, owner, and decision date; and
- the sponsor understands that the next step is validation, not uncontrolled implementation.

12. What this example demonstrates

The example shows why an opportunity workshop should not be an automation brainstorm. A strong operating method creates a decision trail from business outcome to operational evidence, from evidence to priority, and from priority to a controlled test.

It gives the reader an idea of how SOP structure can make a workshop repeatable and auditable. It does not disclose or reproduce the actual AITOC workshop.