

KPI Spreadsheet Template

| Automation Name | Goal | Units | Current Value | Target Value | Frequency | Average Value per Unit | Periodic Benefit | Annual Benefit | Direction | Cost to Build the Automation | Time to Value (Years) | Who's Accountable | Additional Information |
|-----------------------|--|--|---|---|---------------------------------------|---|--|---|--|--|--|--|--|
| Name each automation. | What will the automation accomplish? (e.g. decrease manual steps, speed up transaction processing, etc.) | What will you track to measure progress? | What's the current value (before automating)? | What should the value be after the automation is built? | How often will you take measurements? | How much does your organization spend on a single unit? (e.g. hourly rate of employees performing manual steps, price per transaction, etc..) | (Calculated value): Monetary benefit for your organization during the timeframe you selected in column F | (Calculated value): Monetary benefit for your organization annually | (Calculated Value): Identifies whether the automation will result in a cost savings or revenue increase for your organization. | What is the estimated one time cost to build the automation? | (Calculated Value) How long it will take for the automation to begin paying for itself (in years). | Who will be responsible for ensuring that the automation reaches its stated goals? | Notes, comments, links to design documentation, etc... |
| Example Automation A | Decrease hours spent on manual tasks by 20% | Staff Hours | 100 | 80 | Monthly | \$30.00 | \$600.00 | \$7,200.00 | Savings | \$10,000 | 1.39 | <Team Name> | Link to documentation |
| Example Automation B | Close 10% more support cases within their Stated SLAs | Cases Closed | 500 | 550 | Weekly | \$10.00 | \$500.00 | \$26,000.00 | Increase | \$20,000 | 0.77 | <Team Name> | Link to documentation |
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