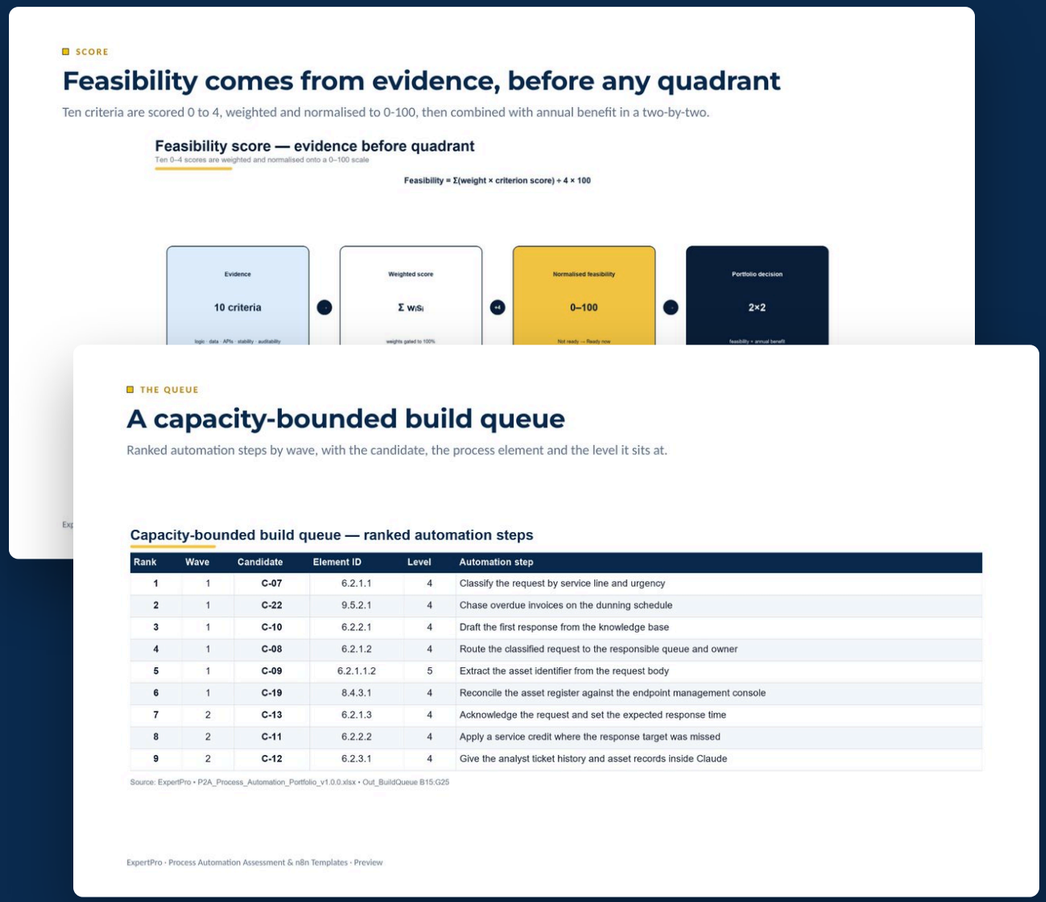
EXPERT PRO
EXPERTOS EN PROYECTOS

PRODUCT PREVIEW · GUIDED TOUR

Process Automation Assessment & n8n Templates

Break processes down to task level, score candidates on ten criteria, choose the least autonomous pattern that works and fund the queue on cash.

10 criteria | 5 delivery patterns | 8 n8n templates | 87 checks



Illustrative demonstration data from the worked example. Not investment advice. 11 pages.

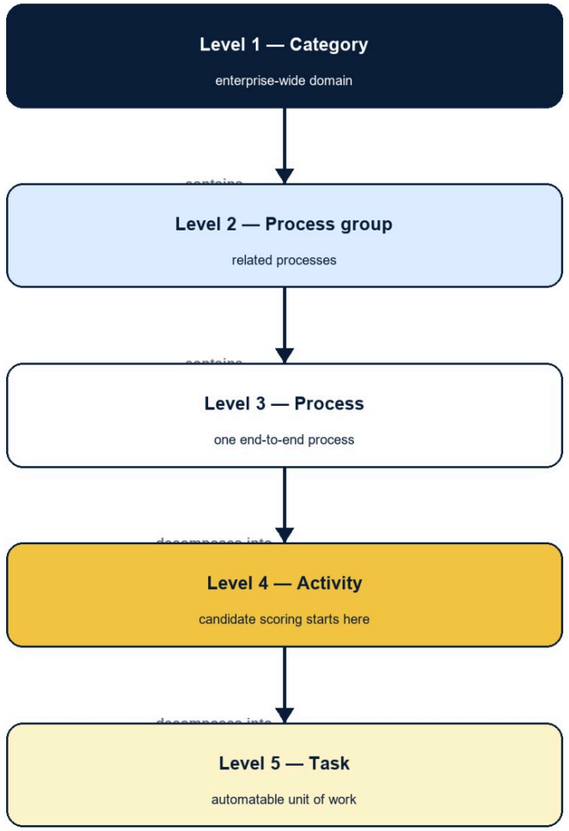
DECOMPOSE FIRST

A five-level process hierarchy

Category, process group, process, activity and task: only activities and tasks are scored, where executability can be tested.

The five-level process hierarchy

Automation starts at activities and tasks; the upper levels provide context and ownership



SCORE

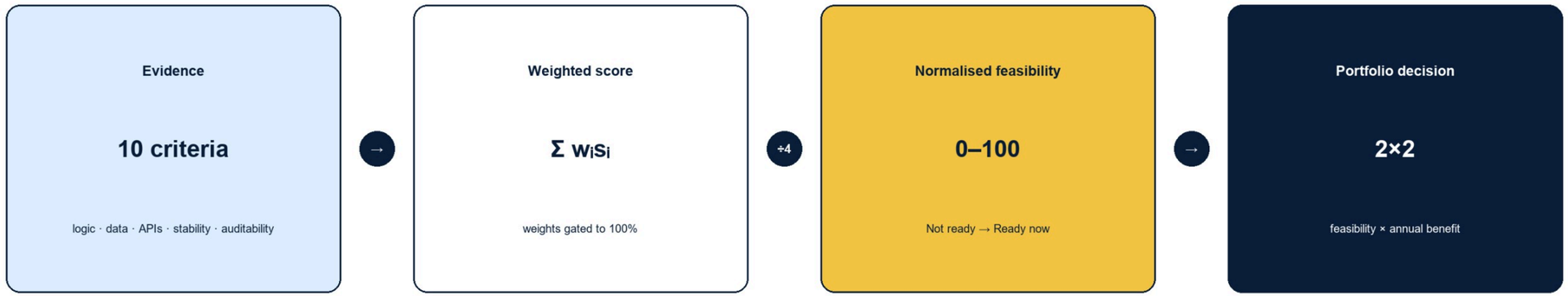
Feasibility comes from evidence, before any quadrant

Ten criteria are scored 0 to 4, weighted and normalised to 0-100, then combined with annual benefit in a two-by-two.

Feasibility score — evidence before quadrant

Ten 0–4 scores are weighted and normalised onto a 0–100 scale

Feasibility = Σ(weight × criterion score) ÷ 4 × 100

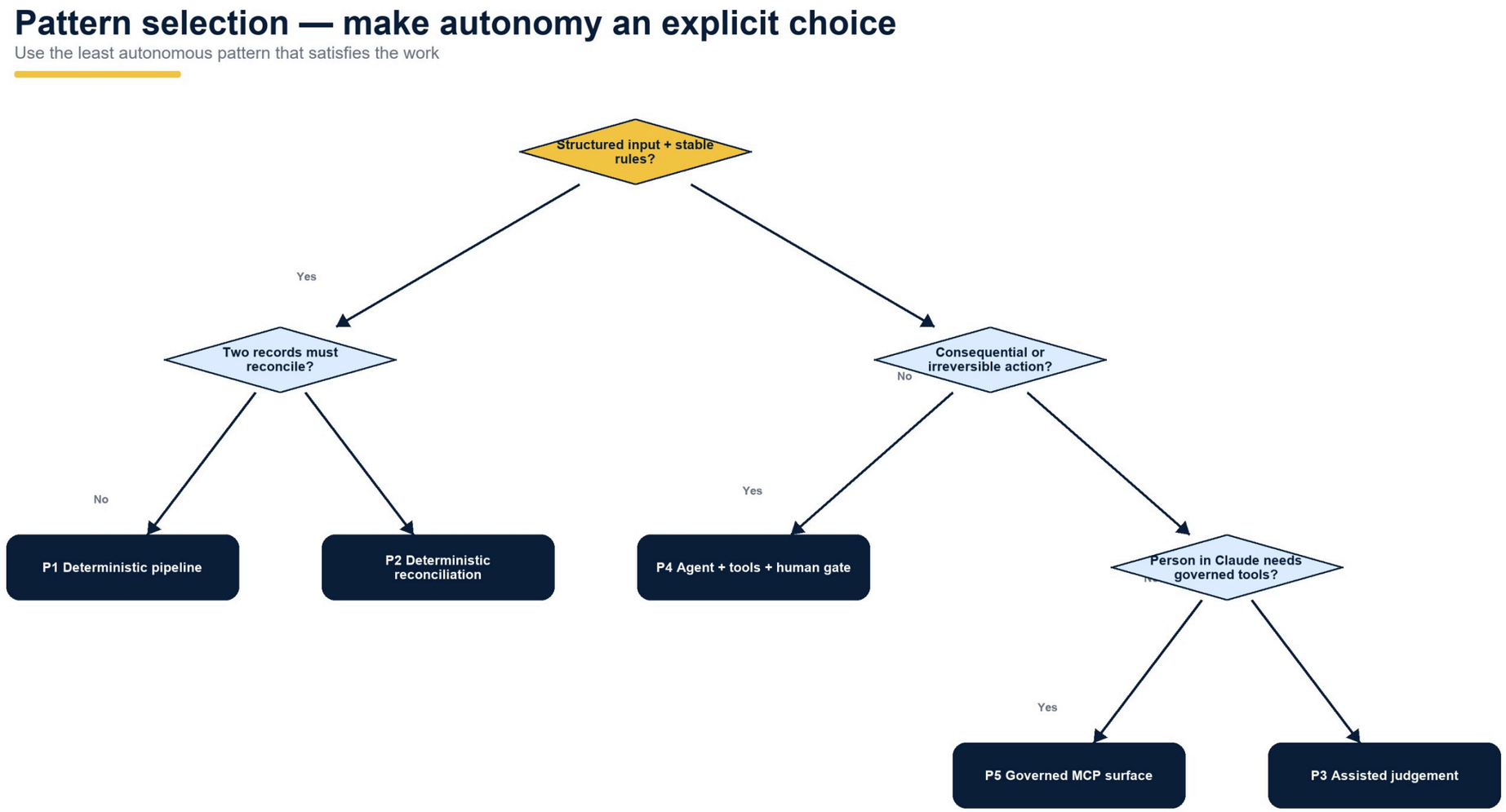


A high-value process below the Buildable floor becomes process work, not an automation project.

CHOOSE THE PATTERN

Make autonomy an explicit choice

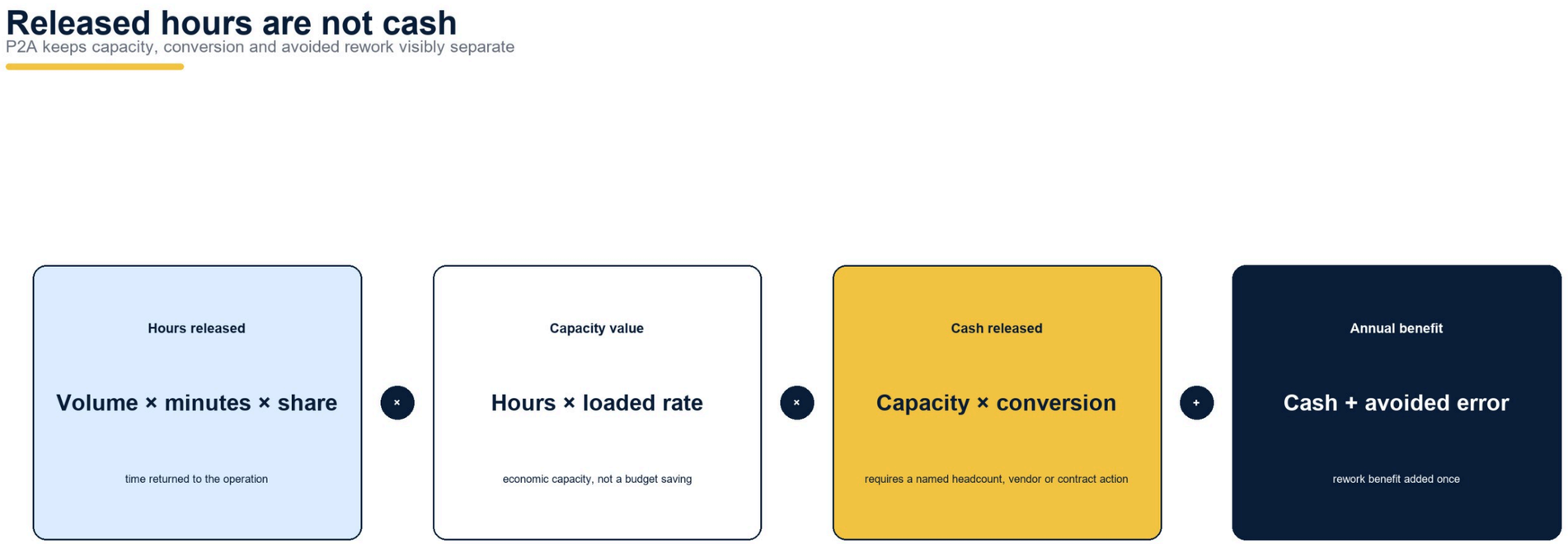
A decision tree assigns one of five delivery patterns and challenges a model or agent where deterministic logic is enough.



VALUE

Released hours are not cash

Hours released, capacity value, cash released and avoided error are kept apart, so the business case is not overstated.



The model never adds raw hours to currency and never books all capacity value as cash.

A capacity-bounded build queue

Ranked automation steps by wave, with the candidate, the process element and the level it sits at.

Capacity-bounded build queue — ranked automation steps

Rank	Wave	Candidate	Element ID	Level	Automation step
1	1	**C-07**	6.2.1.1	4	Classify the request by service line and urgency
2	1	**C-22**	9.5.2.1	4	Chase overdue invoices on the dunning schedule
3	1	**C-10**	6.2.2.1	4	Draft the first response from the knowledge base
4	1	**C-08**	6.2.1.2	4	Route the classified request to the responsible queue and owner
5	1	**C-09**	6.2.1.1.2	5	Extract the asset identifier from the request body
6	1	**C-19**	8.4.3.1	4	Reconcile the asset register against the endpoint management console
7	2	**C-13**	6.2.1.3	4	Acknowledge the request and set the expected response time
8	2	**C-11**	6.2.2.2	4	Apply a service credit where the response target was missed
9	2	**C-12**	6.2.3.1	4	Give the analyst ticket history and asset records inside Claude

Source: ExpertPro • P2A_Process_Automation_Portfolio_v1.0.0.xlsx • Out_BuildQueue B15:G25

WORKED DEMO

What the services-group demo shows

A managed IT and professional-services provider with 340 employees and USD 62 million of revenue. Figures illustrate the method.

22 / 9

Candidates scored / in the build queue

From 64 process elements

7,925

Hours released a year

By the nine-automation queue

USD 116,502

Cash released

Of USD 332,864 capacity value, at 0.35

USD 57,226

Build cost

92.3 engineer-days

9 months

Payback

36-month NPV USD 290,836 at 11%

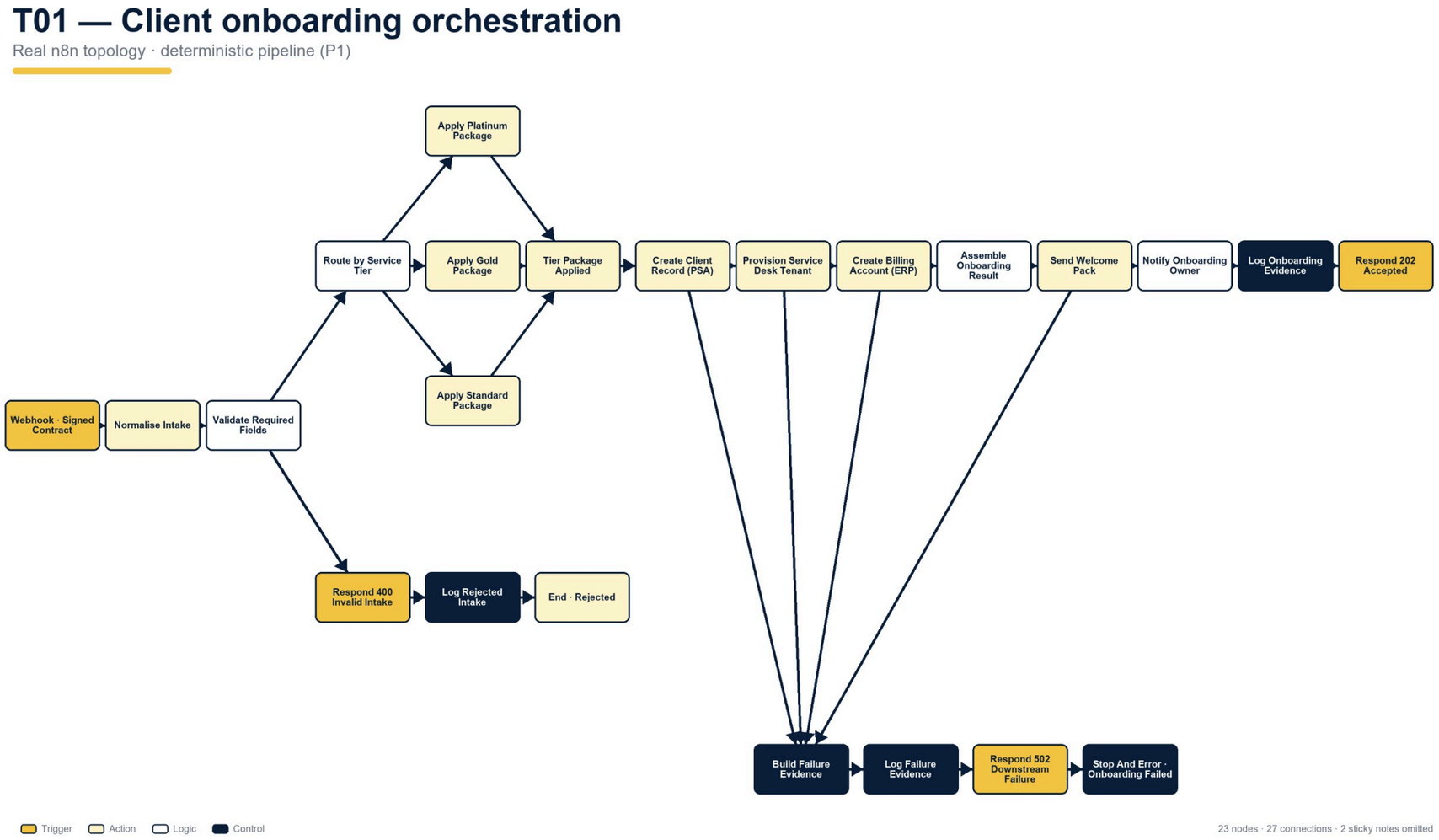
3

Kept out of the queue

“Fix the process first” candidates

Eight workflow templates, ready to adapt

Example: a deterministic client-onboarding orchestration, one of eight n8n JSON templates with a validation record.



TRACK

Delivery, run and value in one tracker

Automations live, failure and intervention rates, cash realised and how far the queue has travelled through each gate.

Automation delivery and run tracker — headline metrics and gate funnel

AUTOMATIONS LIVE	MEAN INTERVENTION RATE	CASH REALISED TO DATE (USD)	REALISATION RATE
5	12.5%	$8,270	109%

EXECUTION FAILURE RATE	HOURS RELEASED TO DATE	RUN COST TO DATE (USD)	MCP SURFACES RATED CRITICAL
1.79%	562	$744.10	1

GATE FUNNEL — HOW FAR THE QUEUE HAS TRAVELLED

Gate	Passed	In progress	Not started	Share	What the gate is
G1 Candidate approved	9	0	0	100%	The portfolio decision, carried from the baseline.
G2 Process confirmed at L5	7	2	0	78%	The decomposition is agreed before anyone builds.
G3 Built and tested	6	0	3	67%	Built and tested against named acceptance criteria, outside production.
G4 Published	5	1	3	56%	Draft Save, then an explicit Publish to a named version. Production runs the published version.
G5 Post-implementation review	0	1	8	0%	Run data reviewed against the business case.

Source: ExpertPro • P2X_Automation_Build_Run_Tracker_v1.0.0.xlsx • Out_Tracker C4:I17

WHAT YOU RECEIVE

What is in the download

Format: Excel (XLSX) + ZIP.

XLSX	The 19-sheet process automation portfolio workbook
XLSX	The 16-sheet build, run and value tracker
GUIDE	A 144-page illustrated playbook
JSON	Eight n8n JSON workflow templates and a validation record

Before you buy

- Desktop Excel 2019 or Microsoft 365. No macros.
- Not a process-mining tool: your team decomposes the work.
- The n8n templates are not plug-and-play; they require configuration, security review and testing.
- Benefit figures depend on your assumptions.

Every workbook opens on the complete worked example, so you can follow the finished answer before entering your own data.

WHO BUILT IT

Built by the ExpertPro team

ExpertPro builds the financial and decision infrastructure behind capital projects, at the intersection of project finance, engineering economics and data.

7	100+	15+	50+
senior specialists	years of combined experience	professional certifications	delivered projects

The team

- Project finance and public-private partnerships, PMP® and APMG CP3P® certified
- Data architecture and data science, led by a mathematician
- Process automation and governance, with more than twenty years in banking
- Information security and compliance: ISO/IEC 27001 Lead Auditor and CEH
- Enterprise systems integration and machine-learning engineering

Every model

- Built to the FAST Standard 02c: Flexible, Appropriate, Structured, Transparent
- No macros and no hidden logic; one formula per calculation row
- A documented source and status behind every input
- A checks panel that must read green before results leave the workbook
- A complete user manual and a worked demonstration case

Master's degrees in industrial engineering, information technology and business, a degree in mathematics, and programmes from MIT (applied AI) and HarvardX (data science). Delivery in five Latin American countries, across energy and utilities, transport, logistics, agroindustry and healthcare.