

The AI Workflow Scorecard

From “Your Competitor’s Newest Employee Doesn’t Sleep” | Michael Norton, Pivot True | DTA, July 2026

SIDE A • FIND YOUR FIRST (OR NEXT) AI WIN



Step 1. List candidate workflows with your team (list at least 10 workflows)

Three buckets: repetitive work nobody loves • bottlenecks that wait on one busy person • blank-page work (quotes, RFPs, content)

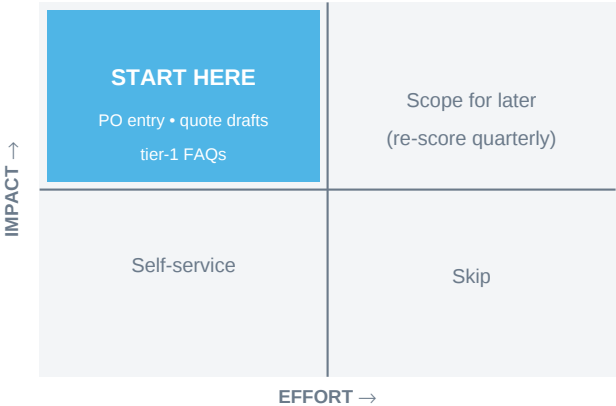
Step 2. Score each workflow 1-10 per column, then plot on the 2x2

Workflow	Volume	Pain	IMPACT (V+P)	Complexity	Data sens.*	EFFORT (C+D)

Volume (how often it happens) and Pain (hours x error cost) add up to IMPACT: higher is better. Complexity (how hard to automate) and

*Data sensitivity (10 = touches PHI/customer data; needs business-tier tool, no-training contract, BAA) add up to EFFORT: lower is better.

How to read it: IMPACT 12+ and EFFORT 8 or less lands in the START HERE box. High impact but high effort: scope for later and re-score quarterly.



- 3

Freeze the baseline BEFORE go-live
2-week time study: minutes per unit, error rate, cost per unit, volume. Once it's live, your 'before' data is gone. Judge at 90 days.
- 4

Pilot with a person in the loop
Run parallel to the current process; a human approves every output. Write graduation criteria on day one (accuracy %, stability, risk checks).
- 5

Prove it, then scale
Compare to baseline: time, errors, cost, and what the team did with freed hours. Count capacity gained, not just cost cut. Then: next workflow, same method.

Bring this to your Monday meeting.

One hour, your leadership team, ten candidate workflows, one winner. That's the whole exercise.

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SIDE B • THE NUMBERS AND THE QUESTIONS



Benchmarks worth knowing

Area	Benchmark	Source
Distributor inventory with AI forecasting	down 20-30%	McKinsey, 2024
Logistics cost / procurement spend	down 5-20% / 5-15%	McKinsey, 2024
Field service first-time fix	77% median vs 88% top performers	Aquant benchmark, 2026
Failed service visits	25% of total service cost	Aquant benchmark, 2026
Manual PO entry	15-20 min each, 3-5% errors	Industry baseline
Automated order entry	up to 95% of processing time eliminated	Published distributor cases
Quote turnaround with AI/CPQ	48 hours to under 15 minutes	Published mfr-distributor case
AI pricing in distribution	+2-4 gross margin points	Distribution ERP benchmark
Tier-1 support deflection	plan on 40-60% (not vendor-claimed 80%)	Third-party deployment data
Human-in-loop productivity	~30% approval mode; ~71% after graduating	Stanford, 51 deployments, 2026

The 6 questions to ask before automating any workflow

- 1 Volume: does this happen at least daily?
- 2 Baseline: do we know what it costs us today, measured?
- 3 Data: does it touch PHI or sensitive customer data? (If yes: enterprise tier, no-training contract, BAA.)
- 4 Buy or build: is there a proven tool? (Buying succeeds roughly twice as often as building.)
- 5 Pilot shape: who is the person in the loop, and what are the graduation criteria?
- 6 ROI: what number, measured how, decides whether we scale or stop?

Three rules from companies that got it right

- Start in the back office: the highest measured ROI hides in unglamorous workflows.
- 70% of the work is people and process, not the technology (BCG's 10-20-70 rule).
- A failed pilot is normal: 61% of successful AI deployments followed a failed attempt (Stanford, 2026).

Want a second set of eyes on your scorecard?

Pivot True offers DTA members a complimentary 20-minute workflow triage call.

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