Priority Matrix Template: How To Identify Low-Risk, High-Volume Tasks

If you’re just starting to introduce automation to workflows, it can be tricky to decide which work items to automate first. We recommend identifying tasks that are low-risk and high-volume, or to put it more plainly, tasks that are recurring and important but don’t necessarily make or break the process in question.

Below, we’ll give you a few examples to get you started. Once you feel comfortable, delete our example and add in your own work items.



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|  | **High volume** | **Medium volume** | **Low volume** |
| **Low risk** | What tasks does your team handle daily that wouldn’t impact your business too much if a mistake was made?  If a mistake was made on these tasks, it would be easy to fix with no lasting damage.  Think rule-based tasks and low complexity.  Ex: Processing NDAs, onboarding clients, processing invoices and loans, opening and closing accounts, lead tracking and nurturing, posting content on social media, or website optimization. |  |  |
| **Medium risk** |  |  |  |
| **High risk** |  |  | What tasks seldomly come your team’s way that would severely impact your business if a mistake was made?  If a mistake was made on these tasks, it would either be hard to reverse or completely irreversible.  Think high complexity, low pay off, and lots of moving parts.  Ex: large customer contracts |

