

THE NEXA SOLUTIONS

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Automation ROI Worksheet

A simple, fillable way to estimate the time and cost impact of a proposed automation — before you commit budget to building it.

A free worksheet from The Nexa Solutions · thanexasolutions.com

HOW TO USE THIS WORKSHEET

Estimate Before You Build

This worksheet walks through a straightforward ROI estimate for a single proposed automation — the kind of back-of-envelope math that should happen before committing budget, not after. It won't be perfectly precise, and it doesn't need to be — a rough, honest estimate beats no estimate at all.

Fill out one copy per automation candidate. If you're comparing multiple possible projects, this becomes a simple, fair way to prioritize which one to build first.

A note on honesty

The most common way this worksheet goes wrong is underestimating build and maintenance cost, or overestimating how often the task actually happens. Use real numbers from a time audit where possible, not optimistic guesses.

SECTION 1

The Task Being Automated

1. Describe the specific task in one or two sentences.

e.g. "Manually forwarding new contact form submissions to the sales team via email"

2. Who currently does this task, and what's their approximate hourly cost (salary/benefits ÷ working hours)?

SECTION 2

Current State: Time & Cost

Metric	Value

Suggested rows to fill in: Time per instance (minutes) · Frequency per week · Hours per year (time × frequency × 52) · Hourly cost of the person doing it · Current annual cost (hours × hourly cost)

SECTION 3

Cost to Build & Maintain the Automation

Cost Item	One-Time	Ongoing (per year)

Suggested rows: Build/development cost · Software or tool subscription · Ongoing maintenance (hours × hourly rate) · Training time for the team · Other

SECTION 4

Savings Calculation

3. What percentage of the current time/cost will the automation actually eliminate?

Rarely 100% — account for exceptions still needing manual handling, and review/maintenance time.

4. Annual savings = Current annual cost (Section 2) × % eliminated (above)

Write the calculated result here.

5. Net first-year value = Annual savings – (one-time cost + first year's ongoing cost, from Section 3)

SECTION 5

Payback Period & ROI

6. Payback period (months) = One-time cost ÷ (Annual savings ÷ 12)

How many months until the automation has paid for its own build cost.

7. Year-one ROI (%) = (Net first-year value ÷ total first-year cost) × 100

A rough rule of thumb

A payback period under 6 months is a strong candidate to prioritize. 6–12 months is reasonable for a meaningful automation. Beyond 12 months, weigh it against the non-financial benefits in Section 6 before committing.

SECTION 6

Non-Financial Benefits

Check anything that genuinely applies — these don't have a dollar figure here, but they're real and worth weighing alongside the numbers above.

- ☐ Reduces errors or inconsistency compared to the manual process
- ☐ Improves response time in a way that affects customer experience or lead conversion
- ☐ Removes a task that's widely disliked, reducing burnout or turnover risk
- ☐ Frees up time for higher-value work the person could be doing instead
- ☐ Creates a foundation (data, integration) that makes future automations easier to build
- ☐ Improves compliance, auditability, or consistency of record-keeping

SECTION 7

Sensitivity Check & Risks

8. What happens to the ROI if actual volume/frequency is 30% lower than estimated?

Re-run Section 4 with a lower frequency to see how sensitive the payback period is to this assumption.

9. What's the biggest risk this estimate could be wrong?

e.g. underestimated edge cases, integration complexity, or ongoing maintenance need

SECTION 8

Decision Summary

Metric	Result

Suggested rows: Annual savings · Total first-year cost · Payback period · Year-one ROI · Recommendation (proceed / hold / reject)

How The Nexa Solutions can help

If the math here makes a strong case, we design and build the automation itself — and if it doesn't, that's useful information too. Visit thanexasolutions.com/contact to book a free consultation and walk through your completed worksheet.