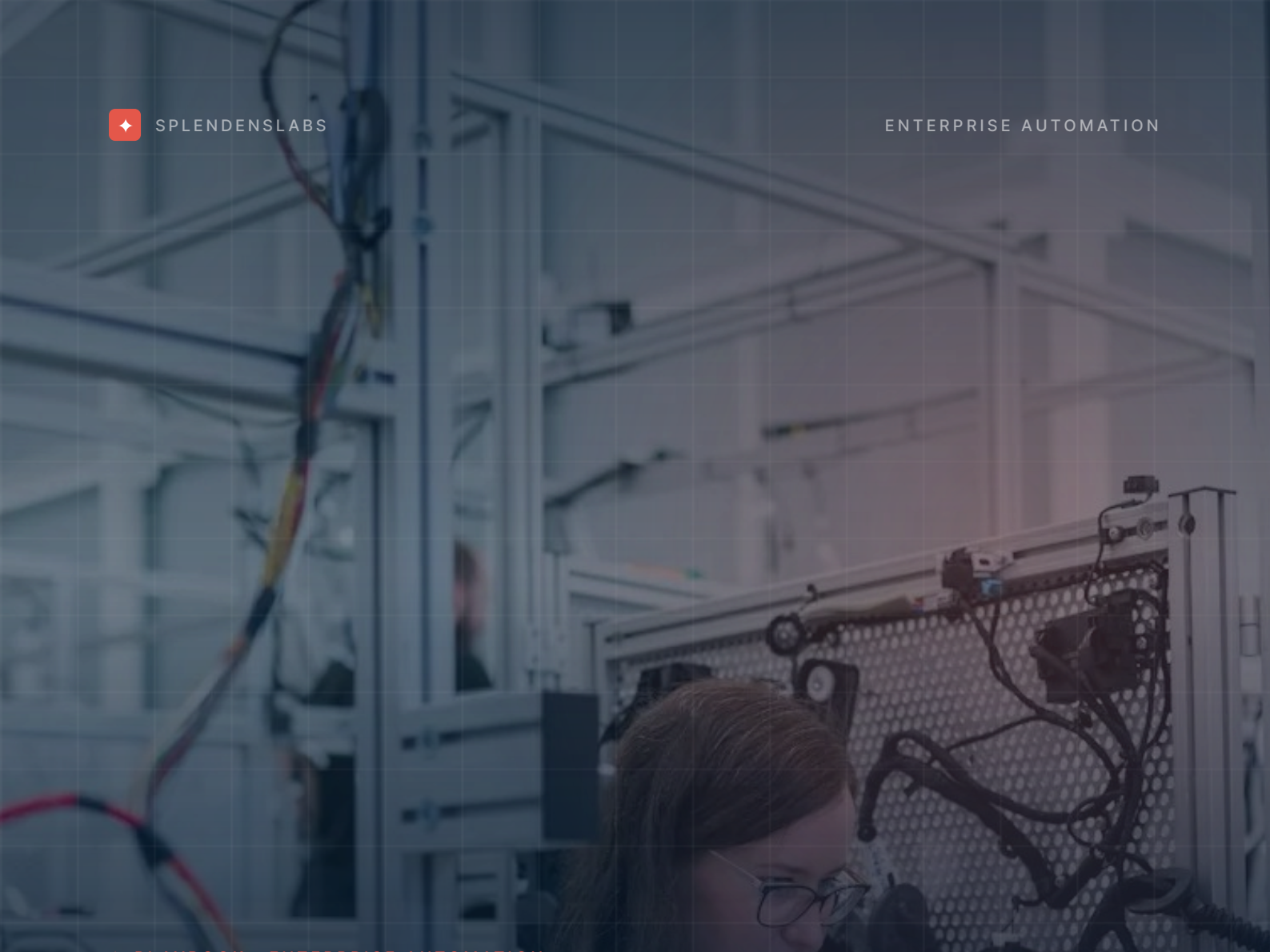


✦ PLAYBOOK · ENTERPRISE AUTOMATION

Enterprise Automation Playbook

How to automate real business processes with the right mix of rules, AI and agents: picking processes, document processing, exception handling, human review queues, ERP and CRM integration, and measuring outcomes.

FORMAT	LEVEL	READ TIME	UPDATED
Playbook	Intermediate	18 min	Mar 2026

OVERVIEW

What this playbook covers

AI has widened what can be automated: unstructured documents, free-text requests and judgment-light decisions are now in scope. But the processes that matter most still run through ERPs, CRMs and approval chains, and they still have exceptions. This playbook covers how to pick processes worth automating, decide where rules, AI or agents belong, process documents reliably, design for exceptions and human review, integrate with systems of record, and measure the outcome honestly.

KEY TAKEAWAYS

- Automate a whole process outcome, not a single step that just moves the queue elsewhere.
- Use rules where logic is known, AI where inputs are unstructured, and agents only where the path varies.
- Design the exception path first — it decides whether automation actually reduces work.
- Human review queues are core infrastructure, with routing, SLAs and feedback built in.
- Write to systems of record through their APIs with idempotency and reconciliation.
- Measure straight-through rate, cycle time and error rate against a baseline taken before go-live.

WHO IT'S FOR

- Heads of operations and shared services
- Process excellence and automation teams
- Enterprise architects and integration engineers
- Finance, procurement and HR leaders

HOW TO USE IT

Choose a process with section 01, design it with section 02, build with sections 03–05 and set up measurement with section 06 before go-live. The baseline worksheet shows a worked example to replace with your own.

CONTENTS

01 Picking processes worth automating
02 Rules, AI or agents
03 Document processing that holds up
04 Exception handling and review queues
05 Integrating with ERP and CRM
06 Measuring outcomes

01 / SELECTION

Picking processes worth automating

Good candidates are frequent, rule-heavy at the core, painful at the edges and owned by someone who wants them fixed.

FINANCE

Invoice processing

Capture, match to purchase orders and receipts, code and route for approval.

OPERATIONS

Order and request intake

Turn emails and forms into structured orders or tickets in the system of record.

CUSTOMER

Case triage

Classify, prioritize, enrich and route incoming customer cases to the right team.

COMPLIANCE

KYC and onboarding

Extract and check document data, flag mismatches and assemble the case file.

HR

Employee requests

Answer policy questions and execute standard changes such as leave or address updates.

PROCUREMENT

Supplier onboarding

Collect documents, validate details and create vendor records with approvals.

Process scoring questions

FACTOR	ASK	FAVORS AUTOMATION WHEN
Volume	How many cases per week?	High and steady, or spiky enough to cause backlogs
Variability	How many distinct paths are there?	A few common paths cover most cases
Input type	Structured, semi-structured or free text?	Inputs are digital, even if unstructured
Systems	Do target systems expose APIs?	Yes, or a supported integration layer exists
Risk	Cost of a wrong action?	Errors are reversible or caught by review
Ownership	Who owns the process end to end?	A single owner can approve changes

02 / DESIGN

Rules, AI or agents

Most automations are a deterministic workflow with AI at specific steps. Pick the lightest tool for each step.

APPROACH	BEST FOR	STRENGTHS	LIMITS
Rules / workflow	Known logic: thresholds, matching, approvals, routing	Predictable, auditable, cheap	Breaks on unstructured input and unseen cases
AI steps	Reading documents and text, classifying, extracting, drafting	Handles variety in inputs	Probabilistic; needs confidence and review
Agents	Investigations where the next step depends on findings	Adapts the path to the case	Harder to test, bound and audit

A typical hybrid process

01 Intake (email, portal, API) → 02 AI: classify & extract → 03 Rules: validate & match → 04 Exceptions → review queue → 05 Write to ERP / CRM → 06 Notify & log

DESIGN RULE

Let rules decide, let AI read

Use models to turn messy inputs into structured data and to draft. Keep the business decision — approve, pay, reject — in explicit rules or with a person, where it can be audited and changed.

03 / DOCUMENTS

Document processing that holds up

Document-heavy processes are where AI adds the most, and where careless extraction does the most damage.

01 Classify the document

Identify type (invoice, contract, ID, form) and route to a type-specific extraction schema.

02 Extract to a strict schema

Define every field with type, format and whether it is required. Ask for evidence (page, region or quote) for each value.

03 Validate with rules

Check totals add up, dates are plausible, IDs match master data and required fields are present.

04 Score confidence per field

Combine model signals, OCR quality and validation results; route low-confidence fields, not whole documents, to review.

05 Keep the original

Store the source file, extracted data, corrections and reviewer for audit and future evaluation.

FRAGILE EXTRACTION	ROBUST EXTRACTION
Free-form model output parsed with regex	Schema-constrained output validated in code
Whole document accepted or rejected	Field-level confidence and targeted review
No check against master data	Cross-checked with ERP vendor and PO data
Corrections lost after the case closes	Corrections stored as labeled eval data

✦ 04 / EXCEPTIONS

Exception handling and review queues

Automation value is decided in the exception path. If exceptions are slower or more confusing than the old process, people will route around the system.

Exception types and handling

EXCEPTION	EXAMPLE	HANDLING
Data quality	Missing PO number, unreadable scan	Review queue with field highlighted; request from sender if needed
Business rule	Amount over tolerance, unknown vendor	Route to the role that owns that rule
Low confidence	Ambiguous classification	Reviewer confirms; decision feeds evaluation
System	ERP API down, timeout on write	Retry with idempotency; alert after limit; never drop the case
Novel case	New document type or request	Manual handling, flagged for process update

01

One queue, many views

A single case store with queues filtered by type, team and priority, rather than separate inboxes.

02

Context in the task

Reviewers see the source document, extracted data, failed checks and suggested action on one screen.

03

SLAs and escalation

Each queue has a target time; ageing cases escalate automatically to a lead.

04

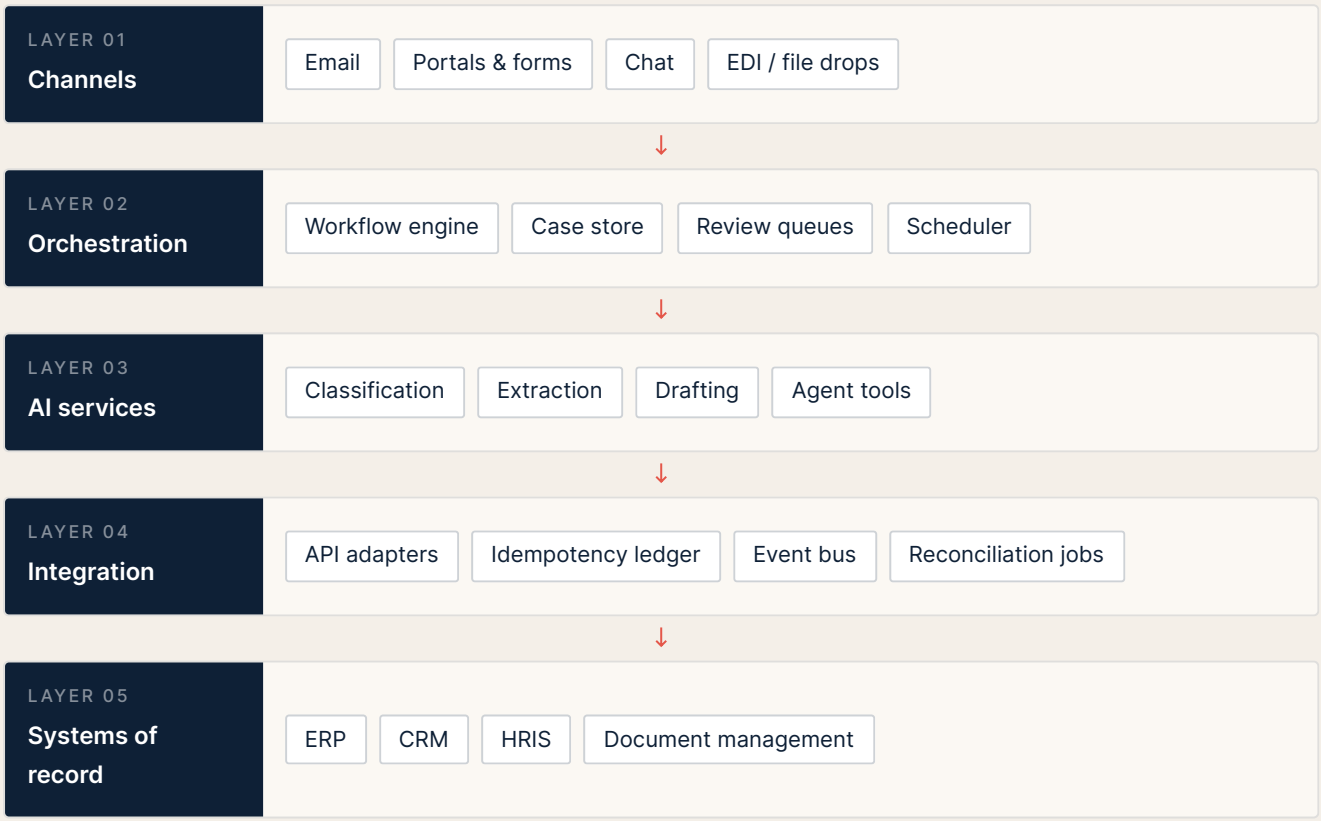
Corrections become training

Every edit is stored as a structured correction used to improve prompts, rules and evals.

✦ 05 / INTEGRATION

Integrating with ERP and CRM

Systems of record are where automation becomes real — and where mistakes become expensive. Integrate deliberately.



Integration checklist

- [ ] Writes use official APIs or supported connectors; screen automation only as a last resort
- [ ] Every write carries an idempotency key and is recorded in a ledger
- [ ] Service accounts have the minimum permissions needed, per process
- [ ] Master data (vendors, customers, products) is read live or synced on a stated schedule
- [ ] Reconciliation jobs compare automation records with the system of record and flag drift
- [ ] Failed writes are retried, alerted and visible in a queue — never silently dropped

06 / OUTCOMES

Measuring outcomes

Measure the process, not the model. Take a baseline before go-live and report the same metrics after.

FLOW

Straight-through rate

Share of cases completed without any human touch.

FLOW

Cycle time

Time from intake to completion, including time in review queues.

QUALITY

Error rate

Cases corrected after completion or found wrong in audit.

QUALITY

Field accuracy

Extracted values that match the reviewed ground truth.

EFFORT

Touches per case

Average number of human interventions on cases that are not straight-through.

COST

Cost per case

People time plus AI and infrastructure cost per completed case.

Baseline worksheet — worked example

Process and owner

01

Worked example: supplier-invoice processing at a fictional mid-size components manufacturer

WORKED EXAMPLE

Supplier-invoice processing (capture, three-way match against PO and goods receipt, coding, approval) — owned by the Accounts Payable Manager (initials S.M.).

Current volume, cycle time and error rate

02

Note how each is measured so the after-figures are comparable

WORKED EXAMPLE

- **Volume:** about 2,400 invoices a month, counted from the ERP invoice register
- **Cycle time:** median 6 business days from email receipt to approved-for-payment, from inbox and ERP timestamps
- **Error rate:** 3 in 100 invoices corrected after posting, from the monthly AP audit sample

Target metrics and review date

03

WORKED EXAMPLE

Targets: 50% straight-through for PO-backed invoices, median cycle time of 2 business days measured the same way, error rate no higher than baseline. **Review date:** 31 Jan 2027, eight weeks after go-live.

> Automation is finished when the exceptions are easier than the old process — not when the happy path works.
>
> SPLENDENSLABS ENGINEERING PRINCIPLE

GET IN TOUCH

Let's Talk

We automate document-heavy and exception-heavy processes end to end, integrated with your ERP and CRM. Bring us the process your team dreads and we will map the automation.

- A process selection and scoring workshop
- Rules, AI and agent design per step
- Review queue and integration architecture
- Baseline and outcome measurement plan

BOOK AN AI STRATEGY SESSION →

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