

**The Human - AI Task Allocation Criteria:** To determine which parts of a job should be automated by AI and which should remain human-led.

**Instructions:** Break a job into specific tasks. Run each task through both scorecards.

**PART A: THE AUTOMATION FIT SCORE**

Can a machine do this? Rate the task on a scale of **0 (Low)** to **5 (High)**.

CRITERION	GUIDING QUESTION	SCORE
<b>1. Repetitiveness</b>	<b>How routine is this task?</b> • 0 = Unique every time. • 5 = Identical process every time.	
<b>2. Data Intensity</b>	<b>Does it involve processing massive data?</b> • 0 = No data analysis involved. • 5 = Requires parsing thousands of data points.	
<b>3. Rule Rigidity</b>	<b>Is there a clear "Right" and "Wrong"?</b> • 0 = Relies on intuition/abstract judgment. • 5 = Follows strict, codifiable logic (If/Then).	
<b>TOTAL (A)</b>	(Sum of 1-3)	___ / 15

**PART B: THE HUMAN COMPLEMENTARITY (EPOCH) SCORE**

Should a human do this? Rate the task on a scale of **0 (Low)** to **5 (High)**.

CRITERION	GUIDING QUESTION	SCORE
<b>1. Empathy (E)</b>	<b>Does it require emotional intelligence?</b> • 0 = Transactional. • 5 = High emotional stakes (e.g., conflict resolution).	
<b>2. Presence (P)</b>	<b>Does it require physical or trusted presence?</b> • 0 = Can be done anonymously. • 5 = Requires "looking them in the eye."	
<b>3. Opinion (O)</b>	<b>Does it require subjective worldview or ethics?</b> • 0 = Objective fact. • 5 = Requires taking a controversial or ethical stance.	
<b>4. Creativity (C)</b>	<b>Does it require non-linear leaps of logic?</b> • 0 = Execution of a known plan. • 5 = Blank slate invention.	
<b>5. Hope (H)</b>	<b>Does it involve rallying or inspiring people?</b> • 0 = Task focused. • 5 = Vision/Leadership focused.	
<b>TOTAL (B)</b>	(Sum of 1-5)	___ / 25

## PART C: THE DECISION MATRIX

**Instructions:** Take your Total Scores from Page 1 and map them below to determine strategy.

### 1. CALCULATE YOUR "ZONE"

- **High Automation Fit:** Score of **10–15** (on Part A).
- **Low Automation Fit:** Score of **0–9** (on Part A).
- **High Human EPOCH:** Score of **15–25** (on Part B).
- **Low Human EPOCH:** Score of **0–14** (on Part B).

### 2. DETERMINE THE STRATEGY

IF YOU SCORED...	YOUR STRATEGY IS...	WHAT THIS MEANS
<b>High Automation Low EPOCH</b>	<b>AUTOMATE</b> <i>(AI-Absorbed)</i>	<b>Delegate to a Digital Teammate.</b> This is robot work. It is repetitive, data-heavy, and requires no empathy. Build an agent to handle this end-to-end. <i>Example: Invoice Processing, Scheduling.</i>
<b>High Automation High EPOCH</b>	<b>AUGMENT</b> <i>(Hybrid)</i>	<b>Build a Co-Pilot.</b> This requires heavy lifting and heavy judgment. The AI provides the First Draft or the analysis. The human provides the decision and the delivery. <i>Example: Drafting Sales Proposals, Coding.</i>
<b>Low Automation High EPOCH</b>	<b>ELEVATE</b> <i>(Human-Only)</i>	<b>Protect this Work.</b> This is human alpha. Automation here destroys value or trust. Reinvest the time saved from other tasks to do more of this. <i>Example: Negotiation, Leadership, Therapy.</i>
<b>Low Automation Low EPOCH</b>	<b>AVOID</b> <i>(Trash)</i>	<b>Eliminate or Outsource.</b> If a task requires neither machine scale nor human genius, why are you doing it at all?

## **PART D: THE ROI ESTIMATOR (Optional)**

If you choose **Automate** or **Augment**, estimate the cognitive dividend (time saved).

1. **Current Hours/Week:** How long does the human spend on this task now? \_\_\_\_\_
2. **Efficiency Multiplier:**
  - For "Automate" tasks: Multiply hours by **0.90** (90 % savings).
  - For "Augment" tasks: Multiply hours by **0.50** (50% savings).
3. **Dividend:** \_\_\_\_\_ Hours returned to the business per week.

**Methodology Note:** *This framework references the **EPOCH model** developed by researchers at the MIT Sloan School of Management, adapted by CCI for applied OD.*