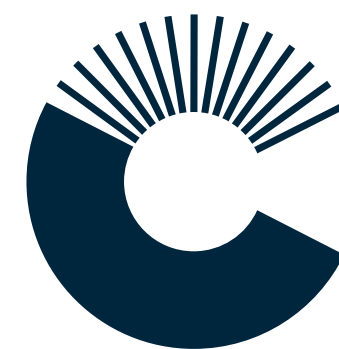# Your workflow automation journey
MADE EASIER

Three steps toward putting your processes on autopilot

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Introduction

Workflow automation. Sounds complicated, doesn't it?

The truth is that the tech behind automating workflows has been around for a while, and the process can actually be made pretty straightforward. After all, the tools that power today's workflow automation successes have been tried, tested, and refined over many years.

The recent disruption to global business operations has made automation more relevant than ever. In its analysis of the tech trends of 2022, Deloitte Consulting described automation as the emerging key to both sustaining and enhancing operations, while empowering workers.[1]

No longer is automation purely about reducing costs and boosting outputs. Now, workflow automation can offer new layers of resilience to an organisation's operations, making them better able to adapt to external pressures and internal demands.

Those pressures could involve changing the nature of your workspace, so it becomes a hub for hybrid workers, or evolving your complete business model to deliver services in an entirely different way.

As such, the key workflow automation questions that organisations are now asking include:

- How can automation improve our customer and employee experiences?

- How do we avoid downtime and disruption while making changes to systems and processes?

- What are the areas best suited to automation that will deliver the greatest probable returns?

- How can we ensure that these changes will be integrated quickly and contribute as much as possible to our long-term goals?

All change can be unsettling, so it is imperative to manage any associated risks. Working alongside the right technology partner can help ensure that. It also means that workflow automation can take place along with your ongoing, day-to-day operations.

In this guide, three steps will be examined that can help you succeed when it comes to assessing and implementing workflow automation.

1 Deloitte Tech Trends 2022
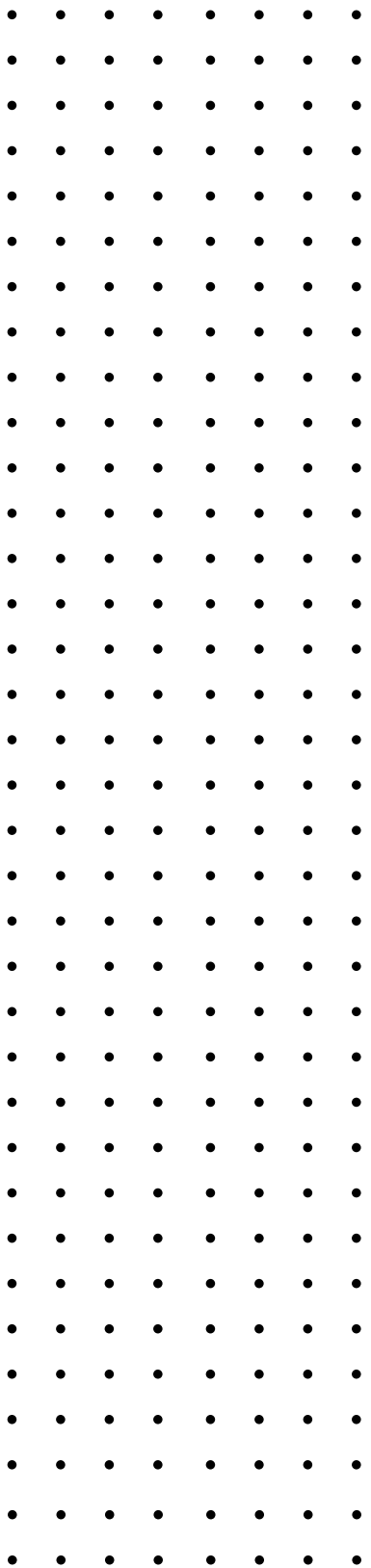
What is
WORKFLOW AUTOMATION?

At its most elementary, workflow automation involves connecting your discrete, manual processes and automating them. It's not just about automating individual tasks – it's about moving to a whole new way of working.

Benefits can come from isolating distinct processes, like accounts payable, and removing the need for manual intervention in the most routine of tasks, such as customer communications.

The aim here is to ensure that vital workflows are not held up by delayed approvals, manual errors, or other commonplace complications.

Of course, automation can appear to be time consuming and complex, and the expertise needed is hard to come by. You don't need to be a workflow automation specialist – you just need a partner who is. One that can help you achieve value sooner, in the areas where it is needed most.

Building a case for
WORKFLOW AUTOMATION

For many businesses, automation constitutes a change in the way that core processes are undertaken. It can challenge accepted ways of working and long-established patterns of behaviour. That's why it is so important for anyone leading an automation project to seek and secure consensus from across the business.

Here are some of the key benefits of automation, which are important to bring into any conversation with teams or fellow decision-makers:
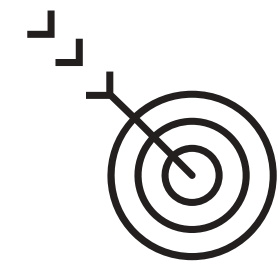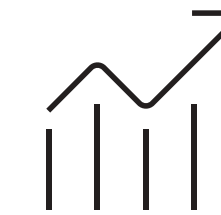
FEWER ERRORS
Reducing the number of manual interventions helps to decrease the risk of human error
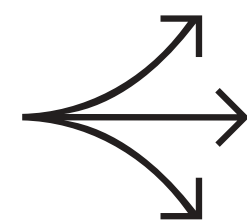
ENHANCED EMPLOYEE EXPERIENCE
Freeing up staff to focus on higher-value work speeds up decisions by making data more accessible
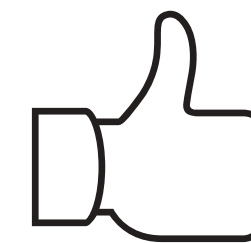
INCREASED PRODUCTIVITY
Minimising downtime improves efficiency and output

A FUTURE-PROOF BUSINESS
The ability to scale your processes easily and rapidly allows you to fit your business needs to a changing world

STAY COMPLIANT
Handling customer documents and data in line with regulations provides clear audit trails to prove compliance
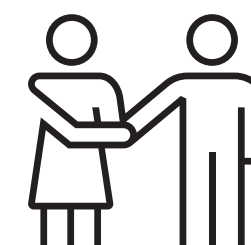
SECURE DATA AND DOCUMENTS
Maximum security, transparency, and data safeguarding precautions reassures customers

EASY ACCESS TO INFORMATION AND PROCESSES
Secure, cloud-based working enables access to everything you need, wherever you are

IMPROVED CUSTOMER EXPERIENCE
Maintaining responsive communications means you can keep pace with customer expectations. compliance

SUSTAINABILITY
Reducing paper usage across document intensive processes increases your sustainability.

With these benefits in mind, here is a three-step process you can undertake to launch an effective workflow automation project.

1. Identify and understand
YOUR WORKFLOWS

Before implementing automation, it's crucial to identify and prioritise the most appropriate target areas. Typically, these should be the ones that offer the most value over the shortest timeframe.

They should also fit in with existing processes and not detract from them. Sometimes this selection can be straightforward. But there may be other, less visible day-to-day tasks that are slowing employees down.

WORK WITH YOUR TEAMS
Employees on the ground – in finance, sales, marketing, HR, legal, or any other business function – are the ones who truly understand which processes are holding them back. Bring them into the discussion and listen to their input: find out where there is friction between internal teams, which approval processes slow down productive work, and what pressures are affecting employees' ability to complete tasks.

IDENTIFY THE PAIN POINTS
Perhaps it's accepted as a fact of life that expenses can take weeks to be reimbursed. But has anyone stopped to find out why this is? Could it be because the finance team aren't receiving submissions promptly due to an issue with the IT systems? Identifying bottlenecks like these – as well as duplicated efforts or manual data-entry tasks – can provide quick wins.

LET AUTOMATION DO YOUR HEAVY LIFTING
Think about your company's most cumbersome manual processes and how they could be transformed digitally. Do you need to consider machine learning? Do your processes require total digitisation or would deploying a single, simple application suffice? Do you have access to analytics that could examine your paper usage and highlight processes ripe for automation?

2. Map and evaluate the
WORKFLOWS TO BE AUTOMATED

The next step is to build a sensible and comprehensive map for your automation. It should outline where action is needed most, which processes to prioritise, how automation will work within existing systems, and what outcome to expect.

LOCATION AND OWNERSHIP
Establish where the most troublesome manual processes sit, and who currently has ownership of them. Help those people to build a plan that works for existing employees, as well as budget owners and business leadership. For example, if you automate one process, how does it impact other tasks those same employees have to fulfil? Then use a mapping tool to plan and take the next steps clearly.

CONSULT WITH TECHNOLOGY EXPERTS
Work with third-party vendors to build a solution that is designed around the needs of employees, so that it encourages greater adoption and engagement. Technology partners often have a much wider view of the market and have delivered similar solutions before, meaning they are well-placed to advise you on how to proceed. Compare current processes and operations with automated, efficient examples to help map the right solution and identify beneficial outcomes. Establishing the objectives and potential gains at this point will help you prioritise projects.

DRAW UP YOUR PLANS
Think about your business goals as you plan: what are they and how will they be affected by the planned changes? Select those workflows that are to be automated based on the impact on these goals, the value they will add to the business, the expected ROI and any positive impact that employees and customers will see. This should balance immediate benefits – which you can share with your teams – against longer-term strategic outcomes. Also, select workflows that need little human intervention and will help lower costs. This will allow you to scale and give you the flexibility to be agile and resilient in future.

3. Implement the right solution
FOR YOU

Steps 1 and 2 should lead to the creation of a clear, pragmatic plan with your technology partner for workflow automation. Rather than a cookie-cutter approach, this should be built around finding the best possible fit for your specific business needs. Now it's time to put that plan into practice.

WORK AT THE RIGHT PACE

The scale and speed of an automation project will vary for every business. You need to ensure that the implementation doesn't cause too much disruption for employees, that those involved are trained properly, and that critical processes continue running. You also need to consider any security and compliance requirements at each stage – rushing this will lead to unnecessary problems later.

START WITH SOME EASY WINS

During your planning, you may have identified some universally unpopular processes which become the best options to automate first. If possible, solving these challenges with out-of-the-box services can quickly build momentum for the wider automation project, satisfy internal stakeholders, and win over employees. Remember though, it is vital to integrate these 'quick fixes' with existing software and services, so you don't have to come back and rebuild them later.

IMPROVE AS YOU GO

No digital transformation project is finished when you flick the switch to turn it on. Instead, it is a rolling program of ongoing enhancements which will benefit from a continued change management approach. From the outset, data analytics and reporting must be hardwired into the project to monitor what is working well and where there may be room for improvement.
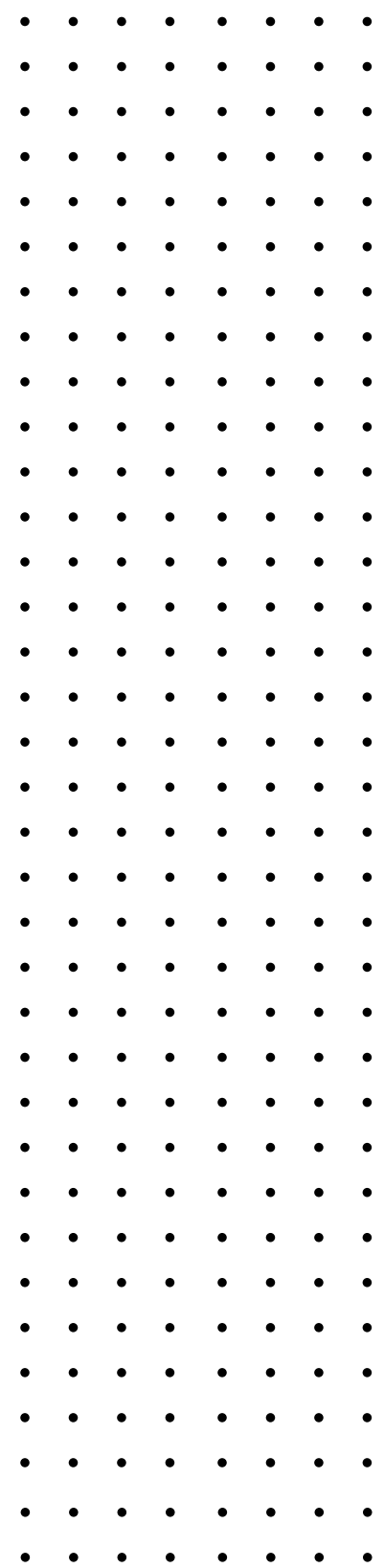
What's **NEST?**

We're on hand to help out with any automation questions you have. We'll help to map out the automation journey, put your process on autopilot and begin your transformation to a more efficient, streamlined tomorrow, today.

If you're interested in finding out more about our services, visit our website.

About
US

We have a long and successful track record in driving digital transformation – and we can support your plans with software, hardware, services, and expertise.

To find out how we're helping businesses like yours to empower their flexible workforce and improve productivity, please contact us.

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