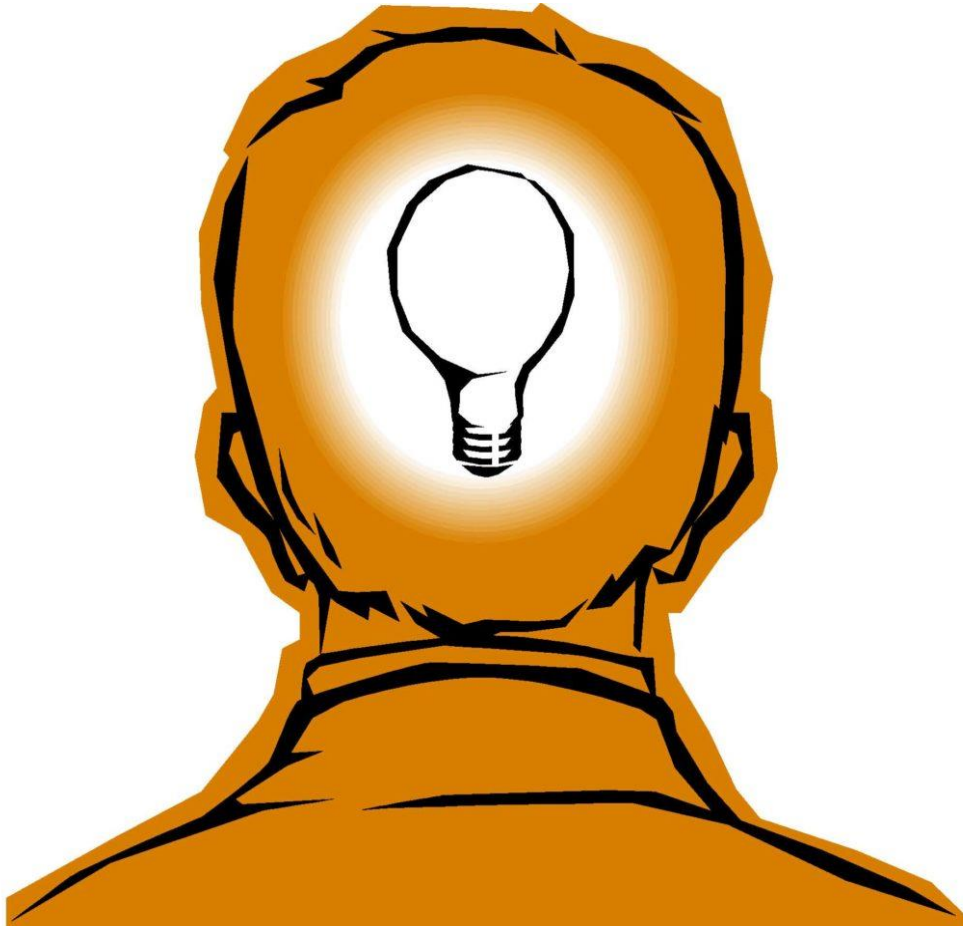# Think Before You Automate
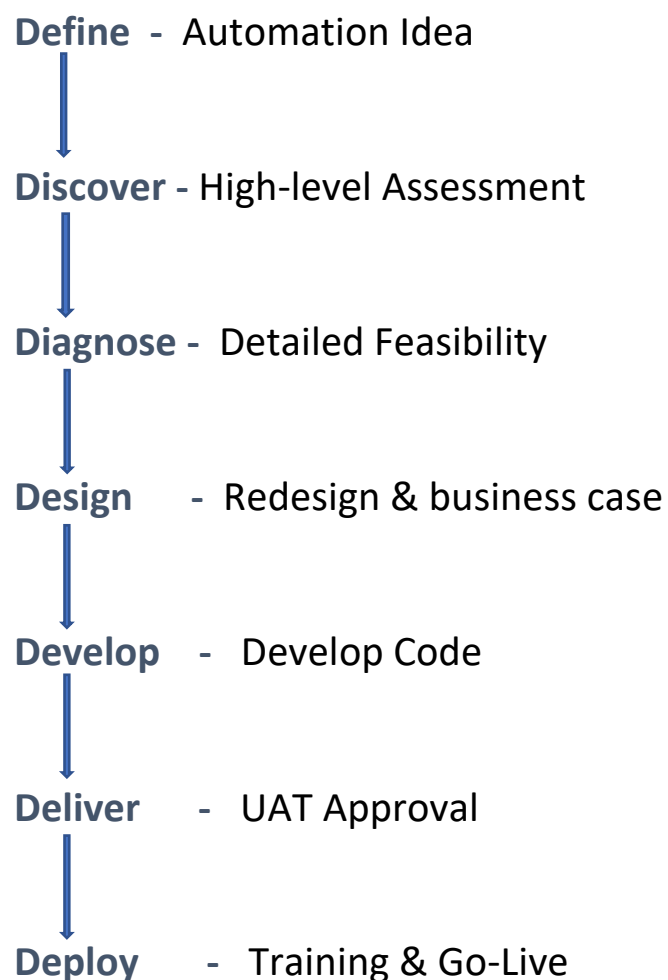
➢ Using innovative approaches to make your business more efficient generates energy and excitement and right now automation is the business innovation trend which is getting people excited.

➢ Automation can save time, reduce the resources needed in a process, remove human error, and reduce expenses.

Some Quotes:-

- *Automation applied to an efficient operation will magnify the efficiency. Automation applied to an inefficient operation will magnify the inefficiency.*
- *If you are automating without improving the process, you are missing a trick. Likewise, if you are looking at process improvements without considering the use of new technical capabilities, you are also missing a trick.*

Typical Intelligent Automation delivery roadmap:-

Define - Automation Idea

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Discover - High-level Assessment

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Diagnose - Detailed Feasibility

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Design - Redesign & business case

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Develop - Develop Code

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Deliver - UAT Approval

↓

Deploy - Training & Go-Live

Introduction to Lean:

- Lean is a process improvement approach.
- As a principle, the aim is to add value from the end users perspective.
- The focus is on increasing efficiency to reduce risk, cost and non-value add activities(waste)

Successful implementation of Lean has 5 outcomes:

1. Estimate Waste
2. Increase Speed
3. Improve Quality
4. Reduce Costs
5. Improve Customer Value

Follow a Lean-led improvement approach and focus on

- What adds value for the customer of your process.
- How it can be delivered in a more effective and efficient way, without impacting risk or quality.

Eight types of waste in office processes

1) Defects
2) Over- Production
3) Waiting
4) Non-utilized talent
5) Transport
6) Inventory
7) Motion
8) Excessive Processing

Examples of waste in office processes

1) Defects
- Missing information to process a transaction
- Incorrect postings (wrong amount or wrong account)

2) Over Production
- Do we produce reports that can be eliminated?
- Do we provide more services than needed?

3) **Waiting**
- Do we have activities or tickets stuck in a queue?
- Do we have customers waiting for a response?

4) Non-utilized talent
- Do experts spend excessive time to get or correct data?
- Do we need to sort through e-mails to find the right document(s)?
- Do we have a lot of manual work?

5) Transportation
- Do we need to file or retrieve paper forms somewhere?
- Do physical documents move around the building(s)?

6) Inventory

- Do we have a stacks of paper forms ready to be processed?
- Do we have e-mails to be actioned?

7) Motion

- Do we have to walk or move a lot for certain activities?
- How many clicks required to get to the right info?

8) Excessive Processing

- Do forms/screens ask for too much info?
- Do we have to enter the same data more than once?

Process analysis: Find the real problem

What is the problem we are trying to address?

The 5x WHY approach

- Define the problem in simple terms
- Ask why, until you come to simple, actionable cause
- Act on that cause to find a solution
- Narrow focus to make the problem smaller