



# Dhīmahī Technolabs

## Business Automation Roadmap Template

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# Business Automation Roadmap Template

**Description:** Strategic template to identify and prioritize automation opportunities in your business. Includes cost-benefit analysis and implementation timeline.

**Context:** India (with focus on SMEs in Gujarat, Maharashtra, Delhi-NCR, Bengaluru, etc.)

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# **Part I — Foundations**

## **1. Introduction**

Automation is the next frontier for Indian SMEs. Whether in retail, textiles, healthcare, manufacturing, or services, SMEs can increase efficiency, reduce errors, and cut costs.

This handbook helps SMEs:

- Identify areas suitable for automation.
- Evaluate costs and benefits in ₹.
- Build a **step-by-step roadmap** with clear timelines.

## 2. Why Business Automation Matters for Indian SMEs

- **Rising Labour Costs:** Skilled manpower is expensive.
- **Competitive Pressure:** Global and national players automate at scale.
- **Compliance:** GST, DPDP 2023, and industry regulations require accurate records.
- **Scalability:** Growth demands processes beyond Excel and WhatsApp.

## 3. Key Benefits of Automation

- Save **₹10,000–₹50,000 per month** in manual admin tasks.
- Reduce human error (billing, GST filings).
- Faster decision-making with real-time dashboards.
- Enhanced customer experience (chatbots, WhatsApp notifications).
- Business continuity even with limited staff.

## 4. Common Challenges in SME Automation

- Limited awareness of available tools.
- Fear of high costs.
- Employee resistance (“machines will replace us”).
- Poor data quality.
- Lack of clear ROI measurement.

## Part II — Identifying Opportunities

### 5. What Processes Can Be Automated?

- **Finance:** Invoicing, GST filing, expense tracking.
- **Sales & Marketing:** Lead capture, WhatsApp follow-ups, email campaigns.
- **HR:** Payroll, attendance, onboarding.
- **Operations:** Inventory management, order tracking.
- **Customer Support:** Chatbots, ticketing.

### 6. Department-Wise Automation Ideas

#### Sales & Marketing

- Lead capture via website/WhatsApp → CRM.
- Automated WhatsApp/email campaigns.
- Proposal generation (templates).

#### Finance

- GST-ready invoicing (Zoho Books, Tally with plugins).
- Automated expense categorisation.
- Bank reconciliation.

#### Operations

- Inventory alerts when stock < threshold.
- Automated purchase order generation.
- Delivery tracking (SMS/WhatsApp).

#### HR

- Automated payroll slips in ₹.

- Attendance linked with biometric.
- AI-based CV screening.

## 7. Opportunity Scoring Framework

Rate each process (1–5 scale):

- **Business Impact** (Revenue, Cost savings).
- **Effort** (Technical difficulty, staff training).
- **Cost (₹)** (Low, Medium, High).
- **Risk** (Low, Medium, High).

👉 Example:

- Automating invoicing: Impact 5, Effort 2, Cost ₹20,000 → High Priority.

## 8. Cost-Benefit Analysis Template

Process	Current Cost (₹/month)	Automation Cost (₹ one- time/monthly)	Savings (₹)	ROI (%)	Payback Period
Invoicing	₹30,000 (manual staff)	₹15,000 setup + ₹2,000/month	₹25,000	833%	< 1 month
Lead Follow-up	₹20,000	₹10,000 setup + ₹1,000/month	₹15,000	1500%	< 1 month

## Part III — Roadmap & Prioritization

### 9. Automation Maturity Assessment

Stage	Characteristics	Example
Basic	Manual processes, Excel sheets	SMEs using WhatsApp + Excel only
Intermediate	Some SaaS tools adopted	Zoho Books for invoices
Advanced	Connected systems, dashboards	ERP + CRM + WhatsApp
Optimised	AI-driven predictions	Predictive inventory management

### 10. Prioritization Matrix (Impact vs Effort)

#### Quadrant Approach:

- High Impact + Low Effort = Automate Now.
- High Impact + High Effort = Plan Pilot.
- Low Impact + Low Effort = Nice-to-have.
- Low Impact + High Effort = Avoid.

### 11. Budgeting for Automation (₹)

#### Cost Components:

- Software subscription (₹500–₹5,000 per user/month).
- One-time setup/customisation (₹25,000–₹2,00,000).
- Training (₹5,000–₹25,000).

- Annual support (~10–15% of total cost).

## 12. Implementation Timeline Template

### Example (6 months):

- Month 1: Needs assessment, shortlist vendors.
- Month 2: Cost-benefit analysis, prioritisation.
- Month 3–4: Pilot project (e.g., invoicing automation).
- Month 5: Review pilot, expand to 2nd process.
- Month 6: Company-wide rollout.

## Part IV — Execution Framework

### 13. Pilot Projects vs Full Rollout

- Start with one department.
- Test for 90 days.
- Measure ROI before scaling.

### 14. Vendor Selection & Tools (India Context)

- **Zoho (Chennai)**: CRM, Finance, HR.
- **Tally with plugins**: GST invoicing.
- **Freshworks (Chennai)**: Support automation.
- **RazorpayX**: Payment automation.
- **LeadSquared (Bengaluru)**: Sales automation.



## 15. Change Management & Training

- Communicate benefits to staff in **local language (Hindi/Gujarati)**.
- Nominate “Automation Champions.”
- Provide hands-on training.

## 16. Risk Management in Automation Projects

- **Risk:** Vendor lock-in → **Mitigation:** Choose open APIs.
- **Risk:** Staff resistance → **Mitigation:** Training & involvement.
- **Risk:** Data leaks → **Mitigation:** Ensure DPDP compliance.

# Part V — Case Studies & Best Practices

## 17. Case Study: Ahmedabad Textile SME

- Problem: Manual invoicing caused 2-day delays.
- Solution: Zoho Books + WhatsApp reminders.
- Outcome: Reduced billing time by 70%. ROI: Saved ₹3 lakh annually.

## 18. Case Study: Surat Jewellery Retailer

- Problem: Missed follow-ups with clients.
- Solution: LeadSquared CRM with WhatsApp automation.

- Outcome: Conversions up 18%, ROI achieved in 2 months.

## Part VI — Toolkits & Appendices

### 19. Automation Roadmap Template

**Step 1:** Document all processes.

**Step 2:** Score opportunities (Impact/Effort/Cost).

**Step 3:** Build Cost-Benefit sheet.

**Step 4:** Prioritise using Impact vs Effort.

**Step 5:** Draft timeline (6–12 months).

**Step 6:** Run pilot.

**Step 7:** Scale.

### 20. Cost-Benefit Analysis Worksheet

Proc ess	Manual Hours	Staff Cost (₹)	Tool Cost (₹)	Net Savings (₹)	R O I
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### 21. Implementation Timeline Worksheet

Month	Activity	Owner	Status
1	Needs assessment	CEO	Pending
2	Vendor shortlist	Manager	In progress
3	Pilot setup	IT	Pending

## 22. Glossary

- **RPA:** Robotic Process Automation.
- **ROI:** Return on Investment.
- **API:** Application Programming Interface.
- **SaaS:** Software as a Service.

## 23. Vendor Directory (India-Focused)

- Zoho (Chennai)
- Freshworks (Chennai)
- LeadSquared (Bengaluru)
- Tally (Bengaluru)
- Razorpay (Bengaluru)

## 24. About Dhīmahī Technolabs

We help SMEs in Gujarat and India **identify automation opportunities**, build cost-benefit models, and implement solutions like CRM, invoicing, and WhatsApp automation.