

The Ultimate Guide to Process Automation





CONTENTS

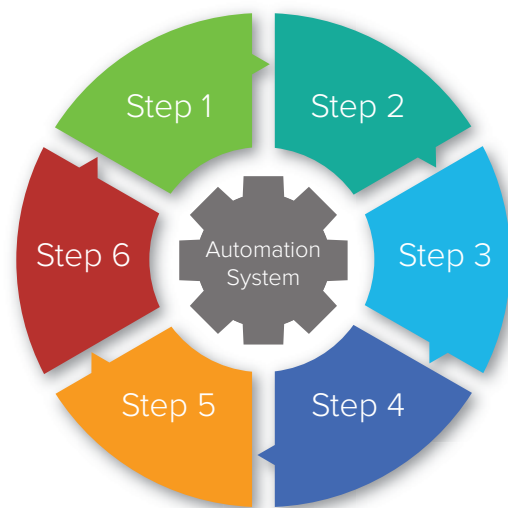
What is process automation?	3
Why companies need process automation	4
Process automation: myths vs. facts	5
Goals and objectives for implementing process automation	6
How to implement a process automation solution	7

What is process automation?

You've probably heard the term "process automation" many times by now. The truth is that depending on how you're planning to use it, process automation (sometimes called workflow automation) can mean very different things. So we're breaking it down and giving you a comprehensive guide to everything you need to implement process management at your business.

Process automation is simply a solution that automates the tasks, resources and internal operations that form the processes known as a "workflow." A workflow is comprised of many small, definable tasks that link together to achieve a specific result. Process automation uses software to link together all the elements of a workflow to increase the speed, visibility and coordination of how the work is completed.

Process automation can provide a number of significant benefits for your organization. Task management is improved because priorities and schedules will be linked across your organization. Tasks and calendars are available to all users, which allow the work to be shared and managed in an efficient manner. It also allows you to see the status of a process in real time, so that you are better equipped to identify roadblocks, resource constraints, and opportunity for process improvement.



It allows you to streamline the processes that run your business, offering dramatically greater efficiency, and ultimately, cost savings. In fact, it's been estimated that process automation typically saves 40 to 60 percent of operations/administration costs¹.

¹TAKE Supply Chain



Why companies need process automation

There's a growing need to implement or improve process automation at today's organizations. Your management teams expect regular reports on planning, staffing, internal resources, sales production, and so on. Additionally, work across siloed departments at complex and globally distributed organizations often becomes unclear and misinterpreted, leaving too much room for error and inefficiency.

The goal of a process automation solution is getting the right information to the right person, in the right order, at the right time. It will assist in enforcing quality control procedures with business logic to guide remediation steps and approval sign-offs.

With process automation, you can resolve and eliminate a plethora of pain points. Use the bullets below as a checklist to identify whether you regularly encounter any or even all of these pain points on a regular basis. This will help you to decide if a process automation solution will bring you greater efficiency and productivity.

- ☐ Disjointed, inefficient or overly-manual business processes
- ☐ Siloed knowledge experts
- ☐ Decentralized data collection, tracking and reporting
- ☐ Lack of accountability within and across departments
- ☐ Disparate work tasks for individuals and teams
- ☐ Lack of team collaboration
- ☐ Limited resource management
- ☐ Quality control issues
- ☐ Regulatory compliance concerns

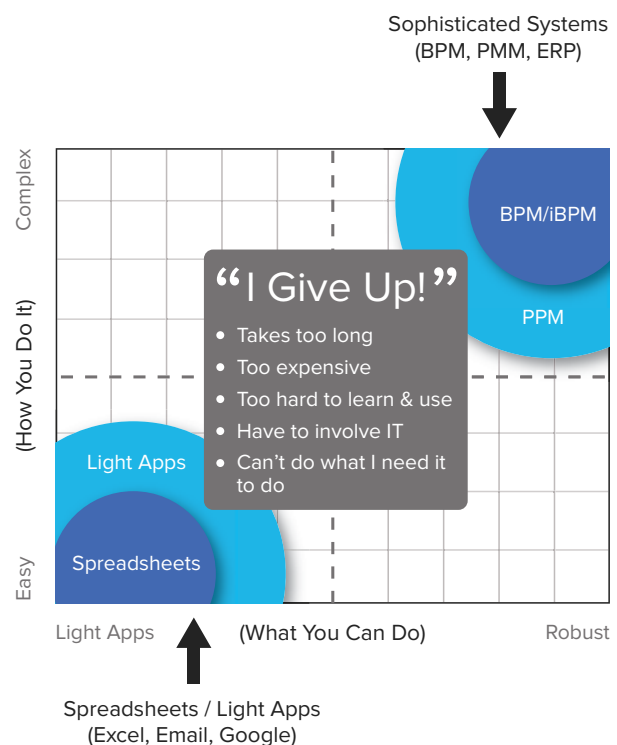
Process automation: myths vs. facts

Process automation offers substantial benefits, but there are also a number of perceived challenges and barriers to finding and implementing an automation solution. Considering that industry experts expect the market to increase by nearly 29 percent² between 2016 and 2019, it's no surprise there are a number of solutions emerging to help resolve these challenges.

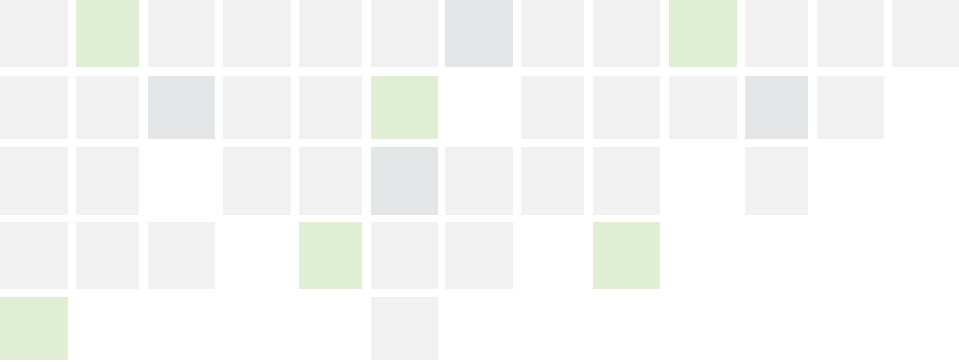
The cost associated with the automation technology is often perceived as high, but as the technology has evolved, a number of cost-effective and affordable solutions have been introduced. A minimal investment in an integrated process automation system can save businesses thousands of dollars in both the short and long term.

Traditionally, the amount of time required to implement an automation solution was also more lengthy than some people needed or expected. While you need to give yourself enough time to implement in order to avoid troublesome mistakes in the workflow down the road, newer technologies have also drastically reduced the amount of time required to implement and customize a process automation solution.

Many businesses also find themselves frustrated by one-size-fits-all solutions that lack scalability. If your organization has processes that continually change,



²TechNavio Global Workflow Management Systems report



a strict or hard-coded solution might be too structured to benefit your company. Many times, changing to a newer process leads to something we like to call the “give up gap.” This occurs when it seems easier to just keep using the same method, rather than changing to a new, more efficient one. This is where customizable solutions that require little to no coding are providing relief, and allowing users to create process solutions that are specifically tailored to their size and needs.

Goals and objectives for implementing process automation

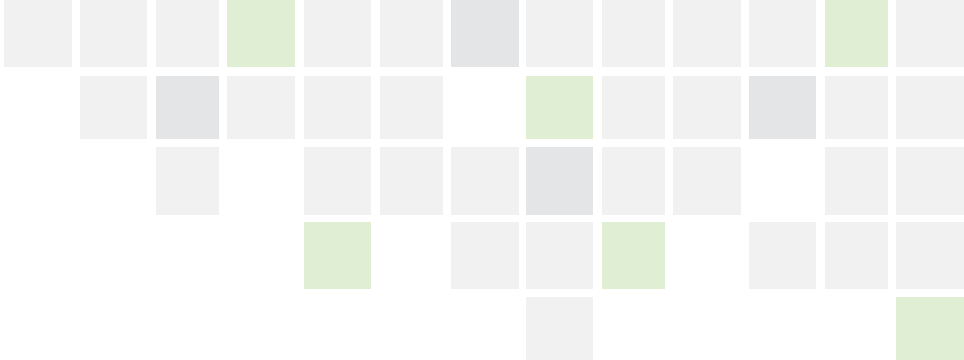
Despite the user-friendly and customizable technology that’s available if you are looking to streamline the management of a workflow, getting started can still be a daunting task. So we’re providing insight on the best way to get started with a process automation solution. Let’s look first at what you need to do to establish goals and objectives for your program.

When you implement a process automation solution, your focus should remain on improving your organization’s ability to efficiently and accurately manage your operational workflows. In addition, you can integrate your process automation solutions with other systems and applications across an organization for an optimal oversight experience.

When determining when process automation is needed, remember that automation solutions should make your business more efficient and productive by:

- Reducing errors and preventing tasks from falling through the cracks
- Promoting internal coordination and collaboration
- Reducing response times
- Empowering employees to manage their own work with little to no supervision

Focusing on removing these types of inefficiencies will also improve customer satisfaction and reduce overall cost.



Another goal to consider: You should be using workflow tools to transform operator knowledge into repeatable processes. For example, look for process automation solutions that can be used for management of:

- Project management
- Vendor/client contracts
- Inventory tracking
- Post-sales fulfillment
- Recurring invoices
- Requisitions and purchase orders
- Quality control tasks and processes

This will accelerate job turnaround time and create a seamless model for operational productivity.

How to implement a process automation solution

Having identified your goals and objectives, here's what you need to keep in mind to make sure you get the most out of your investment.

Below are four essential steps you need to take when implementing a process automation solution:

1. Map out your operational processes

Look internally at your own team, department or division, and then perhaps across your entire organization, and identify all the pain points that are present. Based on these pain points, work to identify workflows that would benefit from automation. Additionally, begin to take a note of where all the different teams or departments need to be involved for reporting, approvals, and other types of collaboration.



2. Define your objectives

Your objectives should always be to find and implement a system that can best manage your processes. But as mentioned, it is crucial for you to define where there is the biggest need for efficiencies and apply automation to where it is needed most.

3. Identify key players

Outline the key players in each team or department, and identify what their specific tasks are in relation to the workflow. Create a communication plan in an effort to make these parties aware of their critical role in the process as well as to help build momentum for the implementation of your automation solution.

4. Isolate current shortcomings

Analyze your current solution and address any gaps where you think things could be better, more automated, secure or streamlined. Identify where these shortcomings are in your current systems, and use your process automation solution to help bridge the gaps.



About TrackVia

TrackVia is an online workflow software that helps businesses rapidly deploy their own Web or mobile applications to easily streamline data collection and manage operational processes.

TrackVia's detailed dashboards and real-time reporting give you enhanced visibility into your operations, and its unrivaled mobile capabilities make it easy for employees to enter data, scan bar codes, geo-tag locations, check reports and collaborate on any iOS or Android device.

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