



# **Prepare for Service Blueprinting Conversations**

## **Key Takeaways**

### **Preparation is Essential**

Aligning automation efforts with business goals ensures meaningful improvements. Understanding both business and technical perspectives helps identify the best automation opportunities. Proper preparation saves development time and ensures automation meets business needs.

### **Align with Business Goals**

A clear understanding of the organization's **"why"** is critical for automation success. Ensuring that automation efforts align with business goals helps drive meaningful and measurable improvements. Defining success criteria with specific, measurable outcomes keeps the focus on impactful results.

### **Gather Process Information**

Gather existing workflows. Identify each step, who performs it, and how information flows between teams. Understanding the current state of processes helps pinpoint inefficiencies and areas where automation can have the most impact.

## **Ask Questions to Identify Gaps**

Engage both business and technical teams in discussions about pain points and inefficiencies. Ask what challenges teams face, where delays occur, and what manual tasks consume the most time. Encourage an open dialogue to uncover hidden obstacles.

## **Identify and Involve Technical Stakeholders**

Ensure the right technical stakeholders are involved early in the conversation. Identify system owners, security teams, and IT administrators who will be responsible for implementing automation. Their insights help determine what's feasible and how automation can be integrated smoothly.

## **Map Out Systems and Data Flow**

List all systems involved in the process, including HR platforms, security tools, and other databases. Track how data moves between these systems and identify where redundancies exist. Understanding system dependencies is critical to designing effective automation solutions.

## **Define Success Criteria and Business Impact**

Establish clear, measurable goals that define what success looks like. Avoid vague targets like “improving efficiency” and instead set specific benchmarks, such as reducing manual data entry by 50% or cutting onboarding time from five days to one. Aligning on success criteria ensures that all teams work toward the same objectives.

## **Relax! You Don't Need to Have All the Answers**

Automation is a journey, and no team has everything figured out from the start. The most important thing is to come prepared with what you know and be open to learning along the way. Asking questions, engaging the right stakeholders, and maintaining clear communication will set you up for success. By focusing on collaboration and continuous improvement, your team can navigate automation with confidence—even without all the answers upfront.