Getting Started With Process Automation

Automating business processes is a key priority for many organizations today. Here are some best practices for getting started:

Pick The Right Process

Choose a process with high volume, repetitive tasks, and digital inputs/outputs. Avoid over-automating human-centric processes. Start small to demonstrate quick wins and build support.

Simplify Before Automating

Re-engineer the process first to eliminate waste and complexity before automating. Don't just pave the cowpath. Simplify activities, standardize variations, and reduce exceptions.

Start With A Pilot

Launch automation in phases starting with a pilot. Use the pilot to build expertise, refine the approach, and demonstrate benefits. Choose the most viable process and scope for the pilot.

Involve Stakeholders Early

Get input from process experts and end-users early. This promotes buy-in and ensures the automated solution will fit needs and workflows. Actively manage change.

Set Up For Success

Allocate sufficient budget. Have leadership mandate and sponsor the initiative. Staff core team with business, technical and change management experts. Institute governance.

Leverage Existing Investments

Look to leverage existing tools like RPA, workflow, AI and APIs first before investing in new solutions. This optimizes total cost of ownership.

Measure & Communicate

Define KPIs and collect baseline performance data before automating. Continue to measure post-automation to validate benefits. Widely communicate wins and lessons learned.

Continuous Improvement

Monitor automated processes for optimization opportunities. Expand scope incrementally. Automate adjacent processes and expand existing ones. Promote a culture of continuous improvement.

In summary, follow these guidelines to ensure your process automation initiatives deliver maximum value and impact.