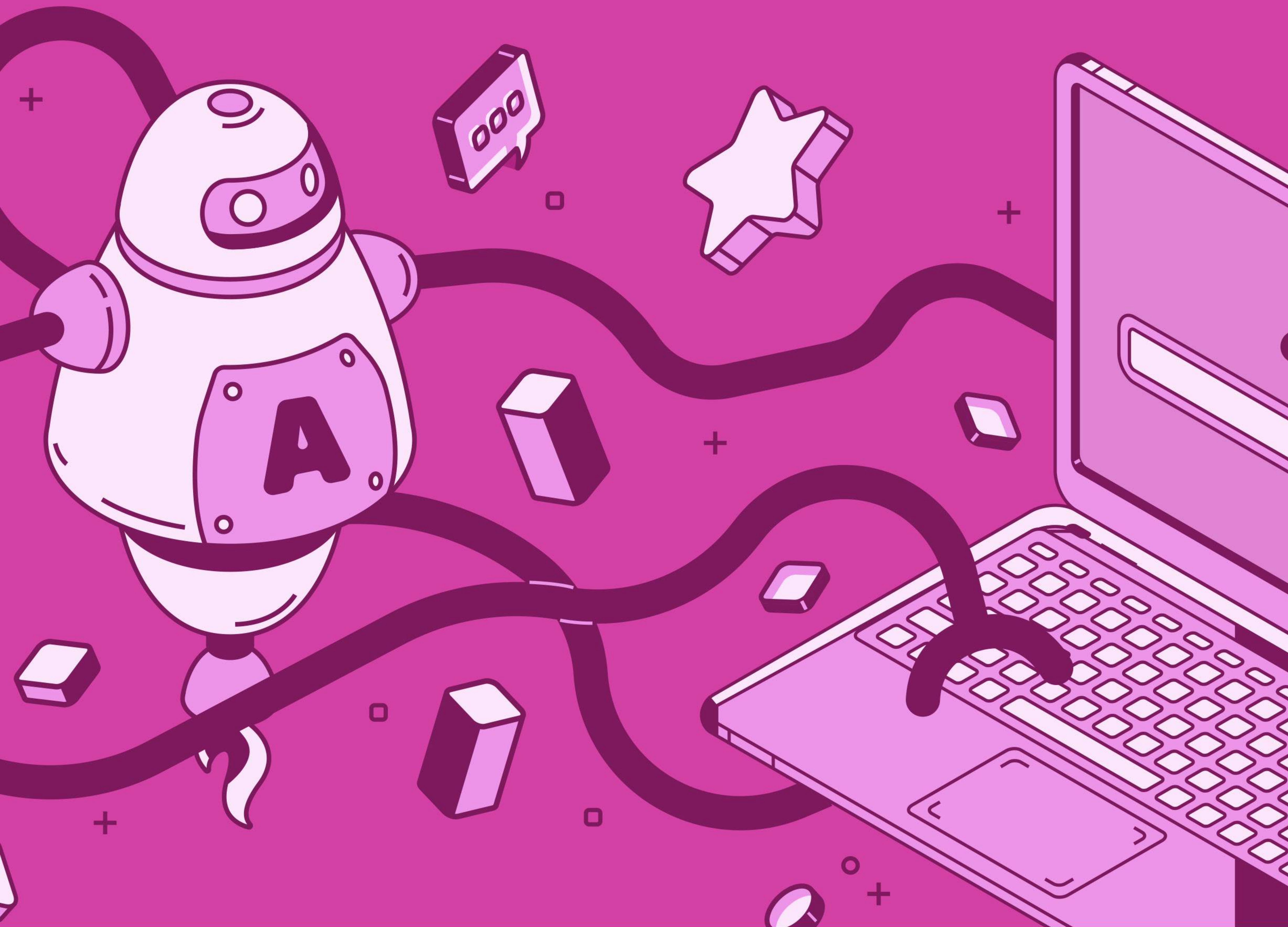


Automation Essentials

For Small Businesses



PREFACE



As a small business owner, you do everything you can to put your company on the right track. You make smart hires, invest in training your team, and pick software that you won't outgrow in two years.

But where are you on automation?

The US Council of Economic Advisors estimates that 83% of jobs paying less than \$20 an hour could be automated in the near future. The McKinsey Global Institute predicts that 20% of all jobs could be automated in a similar time frame.

But aside from lost jobs, how does a small business owner prepare for such an onslaught? What kind of preparations will ensure that your business doesn't suffer the same fate as so many other industries disrupted by automation? Can you embrace technology while also have a thriving workforce?

Automation is a present and increasing reality and, the sooner you can bring it into your company's culture and foundation, the better prepared you will be for the future.



Digital is

NOT THE

Solution

The first step in including automation into your company is to understand what automation is and what it isn't. To start, you need to understand the difference between digitized and automated.

For example, a company that has gotten rid of paper reimbursement forms in favor of fillable PDFs has digitized the form. Eliminating inter-office memos in favor of email is digitization. Turning your employee handbook into a wiki-style format is digitizing.

But none of these are examples of automation.

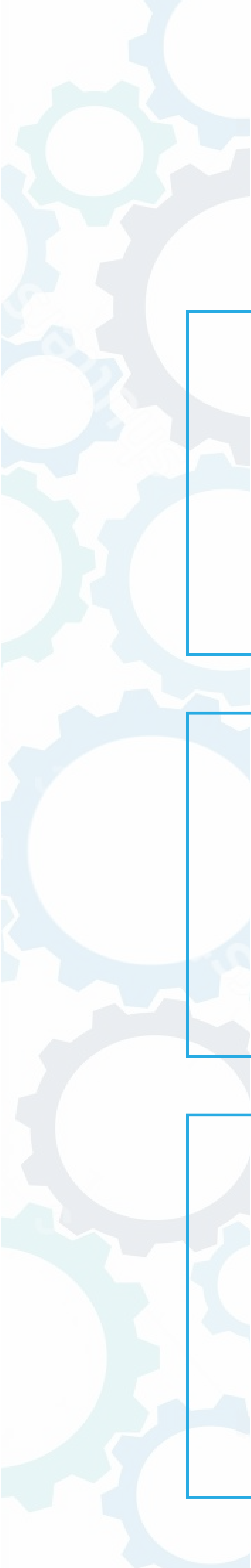
For automation, the enemy is not paper, but the manual transfer of data. If your travelling salesperson must download a reimbursement form, punch in all the data, email it to her manager for approval, and then forward the email and form to the finance department for processing, although the process has a facade of digitization, it's actually a labor-intensive manual workflow.

Automation seeks to eliminate as much of this manual transfer of data as possible.

In an automated workflow, your sales person would start with a reimbursement form that is already half-filled in with all of her details. After submitting all the details, she hits submit. From that moment, she doesn't need to do anything but wait for the cash to be deposited into her account. In fact, every member in the process needs only to complete their small role (i.e. approval, processing) while the transfer is handled without any human lifting.

In the book Digital Transformation with Business Process Automation, Keith Swenson of Fujitsu America says,

“As we make everything digital, what is it that we are transforming? There is little to gain from digitizing things that are already automated. The real benefit comes from transforming things that are not automated; things that today are human processes.”



WHAT AUTOMATION BRINGS TO YOU

1

REDUCED TIME

If you were to eliminate all the time your team currently spends manually inserting, creating, tracking, and transferring data, what kind of savings could you imagine? Automation helps your company spend less time on mundane busywork and more on things that matter.

2

REDUCED ERRORS

When you have an automated, predefined workflow for your processes, the chance of error is greatly reduced. Systems and machines almost never fail to accurately handle data. If you use intelligent forms and appropriate approvals, you can expect your processes to run with zero errors.

3

REDUCED COSTS

The alternative to an automated system is to hire someone to handle all the data generated by a single process and ensure its completion. It is likely that you already have people on staff who are performing some of these manual tasks. By freeing them up to do other things, you will have not only reduced errors, but also saved on labor costs that don't net much of a return.

What Processes Do Small Businesses Automate?

(Click the headings for a Video Walkthrough)

01 EMPLOYEE ONBOARDING

The employee onboarding process should be simple, comprehensive, and easily reproducible. However, it is notoriously slow, generally misses some steps, and doesn't give everyone the same feel. When you automate this process, you can get rid of repetitive form filling. Once a new employee fills in all of his details the first time, the same information can be electronically shared with all the departments that need it. You can also build steps into your workflow to give custom surprises and make sure that someone's work station is ready to go on the day they arrive. An automated onboarding process means new employees are not only happy, but impressed with the automated culture you've created.

02 VACATION REQUEST

No big shocker here. People love to take time off, but the process of actually asking for leave can make you wish you were at the beach already. This automated process allows the requestor, manager, and HR team to work seamlessly together without paper forms or pesky emails.

Lots of SMBs use the Vacation Request app, and best of all, you can connect it directly with your Google Apps account, or use it to show Leave Balances so that everyone knows exactly how many days they have left to take.

03 PURCHASE ORDER

The purchase order is the heartbeat of most SMBs. But in a manual process, it can be painful and tedious to get the items you need while still respecting approvals and data needs. Especially when requests are pouring in from so many vendors, manual forms make the life of the finance team miserable.

Automation can drastically cut down the time taken to request and approve a purchase order. You can even create conditional tasks that only happen if an item is above a certain dollar amount.

04 PURCHASE REQUEST

Purchase Requests are the prequels to the earlier story. Purchase requests can mean the start of something great. Why saddle the process with unnecessary paper forms that make it hard to get anything done?

With an automated process you can not only streamline the purchase request process, you can also link it to a purchase order so that as soon as the PR is approved, a new PO is created.

Chapter One

5 SIGNS YOU ARE READY FOR AUTOMATION



“The first rule of any technology used in a business is that automation applied to an efficient operation will magnify the efficiency. The second is that automation applied to an inefficient operation will magnify the inefficiency.”

- Bill Gates

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The most important key to successfully introducing an automated system to your company is choosing the right process. Pick the right one and you can convince your whole company that automation is the key to the future. Select the wrong one and it may be years before you can try it again.

Automation won't fix the messes you have in your company. It will only improve the efficiency you already have. If you choose a broken process to automate, you won't see any benefits.

Here are five signs that you have a process ready for automation. Use these to identify the best process to start out with automation.