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The Ultimate Guide to Business Process Automation

What is automation?

> *About half of all the activities people are paid to do in the world's workforce could potentially be automated"*

McKinsey&Company

Automation can seem scary at first.

If you're a team leader, you might be worried that it takes too much work to set up. Your manager might be worried that it means hiring more engineers, and your team could be scared robots will take their jobs.

It's just not true.

Automation is a powerful tool your team can use to be more efficient. Using it lets you hand off your menial tasks to computers so that everyone can focus on the important work – work that only humans can do.

At Process Street, we know it can seem difficult to get started with automation. That's why this chapter will take you through:

- What automation is
- What types of business process automation there are

- Why you should be using it in your business
- *Methods to let you get started with automation*

It's not complex, it's not scary, and it certainly won't be putting your team out of a job. Automation is designed to let people produce more work to a higher standard with less effort.
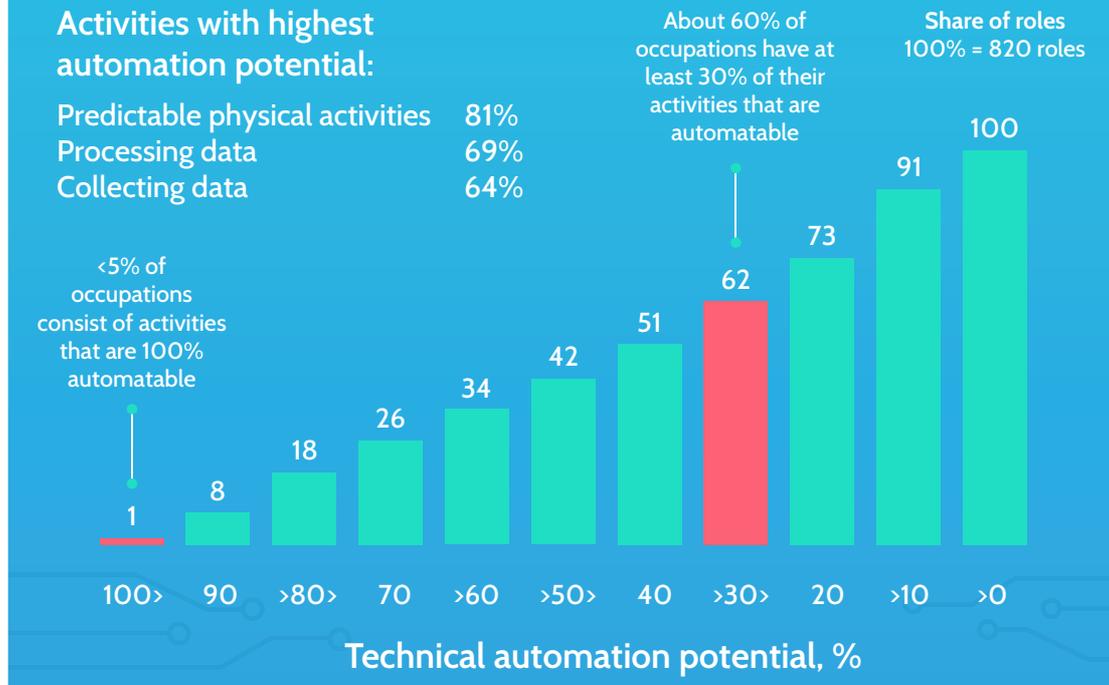
What is automation?

Automation is all about streamlining your team's workload to drop the menial tasks that robots are better at performing. **Your employees won't get replaced**, but will instead be able to **perform more valuable work** instead of getting bogged down in repetitive tasks.

While there are different schools of automation, the main principle lies in **identifying the tasks** in your operations and processes which **machines are better at**. After that, practices and software usage can be tweaked to let those tasks be dealt with automatically.

In this way, automation doesn't just mean that simple tasks are completed quicker and more efficiently – it also frees up time for your employees to focus on work that humans are better at (and more engaged with). This includes tasks like interviewing and helping customers and reviewing important documents – anything which requires human intelligence or judgment.

While few occupations are fully automatable, 60 percent of all occupations have at least 30 percent technically automatable activities

Activities with highest automation potential:

Predictable physical activities	81%
Processing data	69%
Collecting data	64%

About 60% of occupations have at least 30% of their activities that are automatable

Share of roles
100% = 820 roles

<5% of occupations consist of activities that are 100% automatable

100>	90	>80>	70	>60	>50>	40	>30>	20	>10	>0
1	8	18	26	34	42	51	62	73	91	100

Technical automation potential, %

Without this clutter in their workflow, your team's valuable output will exponentially increase. For example, without having to switch between programs to get the information they need and losing time wondering what to do next, your marketing team might be able to approve 10 items per hour instead of 1, your support team could handle 20 tickets instead of 5, and so on.

Again, **you're not replacing team members**, but **augmenting their ability** to do the work of a team ten times the size.

To help you achieve this, we'll look at four types of automation:

- Basic automation

- Process automation

- Integration automation

- AI automation

Basic automation

Basic automation involves basic time saves, such as using software like Slack to streamline communications and keep everyone up to date

Basic automation is centered around simple tasks, usability, and communication.

It's less "automatically perform this task" and more "make this task easier to perform", usually through providing a central location to view all of the relevant information.

This is the easiest type of automation to achieve, as it doesn't require any special knowledge or fancy tools. At its most complicated, you will have to use one extra piece of software or
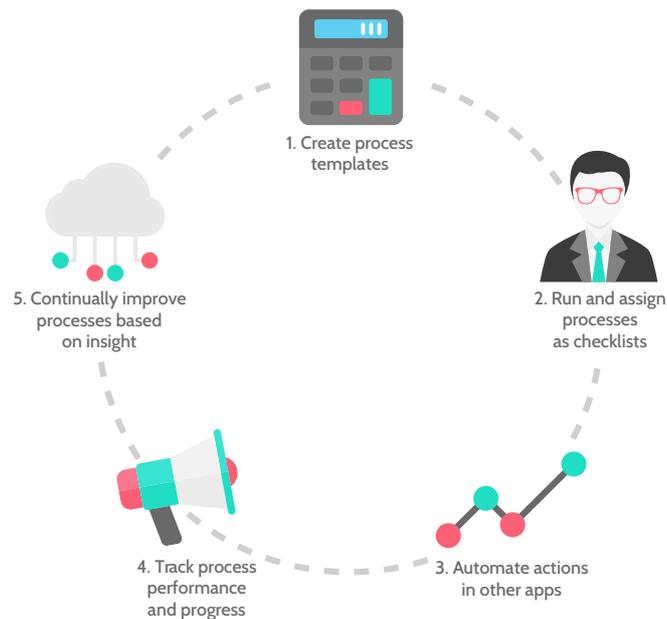
swap out several of your current tools for a combined service.

For example, transparent communication is vital for enterprises to avoid confusion and wasted time. The traditional method would be to use email, whereas a basic automation would get your team to use a central chat application like Slack. This way your entire team can keep track of their conversations in a single location and host team chats to keep everyone up to date.

Process automation

Process automation is a little more complex, but infinitely more powerful. This method focuses on **documenting and managing your team's processes** to make sure everyone knows what's going on and how to perform their tasks.

Although you can do this using traditional office software like Excel and Word, it's better to use a piece of dedicated business process management software (BPM software) such as Process Street.

1. Create process templates

2. Run and assign processes as checklists

3. Automate actions in other apps

4. Track process performance and progress

5. Continually improve processes based on insight

Documenting your processes gives your team an optimized list of instructions for their common tasks, letting them perform their work faster and more accurately.

It also means that even inexperienced employees can reliably complete complex tasks, as they can be given access to the same instructions the rest of your team follows.

Integration automation

Integration automation is the most powerful in-house technique, but also the most difficult to set up. Here, the idea is to simulate a kind of digital workforce – machines which can observe the repetitive tasks your team performs and then carry them out in the same way.

When this task is checked off...   Automatically email
a contract to the new hire
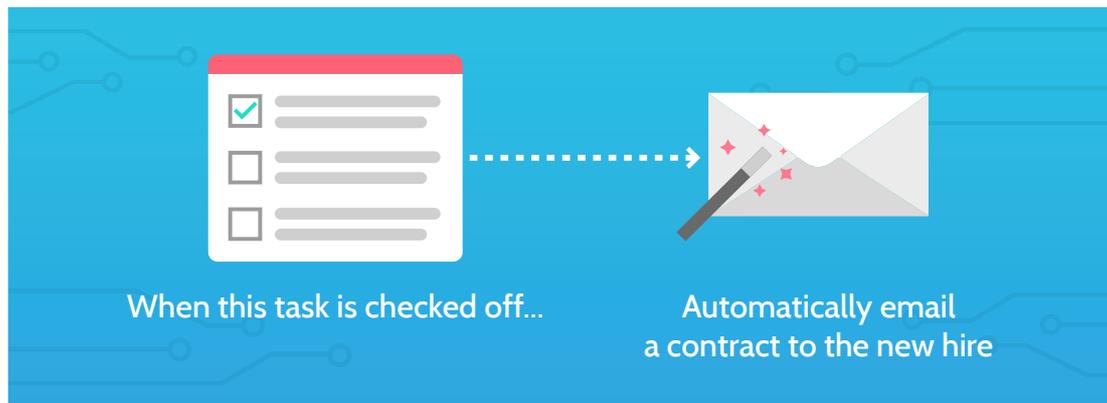
Think of it as your services talking to each other or a robot performing a task according to predetermined logic. As long as you can define rules for actions to be performed at specific times or when certain events occur, integration automation lets a machine take that task off your hands entirely.

For example, let's say that you run a support checklist to process every query a customer submits. Instead of doing this manually every time, you could integrate your BPM and customer support software to have your checklists run automatically. You could even have team members be automatically assigned to let them instantly know when they need to take action.

AI automation

AI automation combines integrations with the decision-making power of artificial intelligence, effectively giving you a digital robot that can process data like a human.
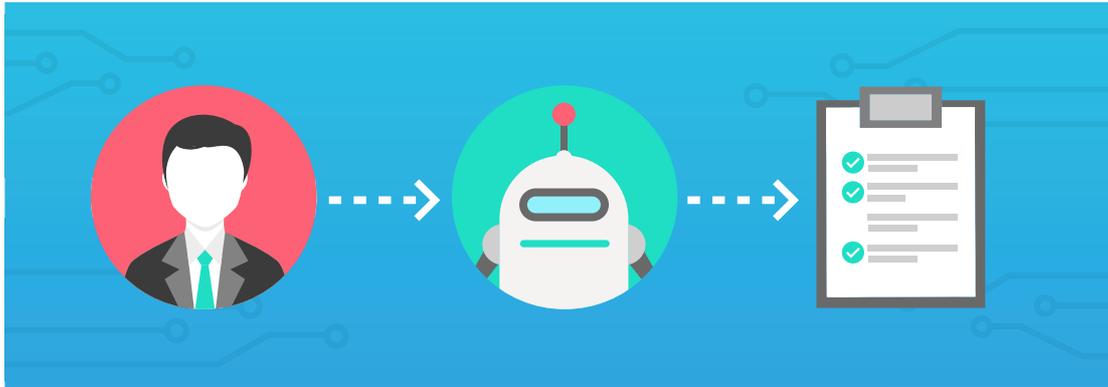
This means you can route data through an algorithm that decides what to do with it. To give you an idea of what that means in practical terms, let's look at a quick customer support example.

With AI automation, you could have a program that constantly analyzes new support tickets for signs of customer irritation and notifies the support team if the customer is high-value. This would mean you could easily identify and avert crises that could damage your bottom line. For a detailed explanation of how to implement this example, check here.

Why should you care?

In a sentence, automation turns your team into super-humans. In detail, it has the following benefits:

- Machines perform tasks faster, with zero variance or human error

- Even basic automation greatly improves efficiency and visibility
- Work is carried out to a consistent standard
- Routine tasks like employee onboarding can be completed much faster
- Communication and knowledge-sharing becomes simple and open
- Employee accountability is increased and enforced
- Managing large teams becomes a simple task of checking your process overviews
- Problems in your processes become easy to spot and fix

No matter how good an employee is, there will inevitably be some human error in their work. Machines don't have this problem, and can perform the tasks you set out reliably every time. Not only that, but any tasks you hand off will be completed much faster.

Depending on your industry, Forrester predicts **that automation can cut costs by a margin of 10-90%.**

All of the time and energy your team spends on repetitive and menial tasks can also be funneled into more engaging, complex, and valuable work – there's no point in a human slowly doing a task that could be automated in seconds. This means you're conserving the budget in your current operations and getting more done with your team.

There are less quantifiable benefits too, especially where your team is concerned. The combination of reliable, transparent communication, getting rid of their boring tasks, and increasing the amount of creative, engaging work works wonders for morale and motivation:

According to CIO, **78% of workers say that "automating manual, repetitive tasks would allow them to focus on the more interesting and rewarding aspects of their jobs".**

Managing a team or heading a department becomes much easier too, since your communication, accountability, and processes are all being maintained to a high standard. Instead of chasing everyone up for their work you can go into your BPM overview and instantly see who's doing well, who's on schedule, and who might need some help or a follow-up message.

In other words, automation lets you create a more efficient, accurate, motivated, and manageable team which can scale as your company grows.

Four automation methods you can implement now

Enough about the virtues of automation – let's dive into some methods for using it in your own team!

Here we'll cover:

- Extending your IT services
- Using a BPM system
- Integrating your programs (through your BPM system)
- Using AI automation

Extending your IT services

Gartner predicts that the prevalence of IT automation has risen by 275% since 2014, bringing productivity boosts of 30-40%.

So, how can you get in on the action?

First up, you can extend your IT services and create custom integrations to link all of your current systems together. This usually involves dedicating development resources to creating integrations or using existing program APIs to let your services interact with each other.

While useful, this options takes a big investment in order to pay off,

and is only worthwhile in specific circumstances.

Other automation methods are available which are cheaper, easier to set up, and generally just as (if not more) effective in the short and long-term. This is, however, still a valid option for when your tasks cannot be performed in any other way than how you currently do them.

If the tasks you're trying to automate have to be carried out using the specific programs and methods you're currently using and you've already documented and optimized your processes, then custom integrations can help to further boost your team's performance. Otherwise, it's best to try other, easier avenues before committing to extending your IT services.

Using a business process management system

> 66 *[After deploying a BPM program, we saw] 95% success rates with the projects (compared to numbers closer to 25% for overall IT projects and ERP projects)"*

Gartner

Want to skyrocket your project success rate by 280%? BPM is the answer.

Whether you're just starting out with automation or you're

extending the practice to encompass more tasks, using a BPM system is a time-and-cost-efficient way to optimize your operations.

The first step is to map your end-to-end process workflows to clearly define the tasks involved in each. There's no special technique here; just sit down with your team and document how your processes are currently performed.
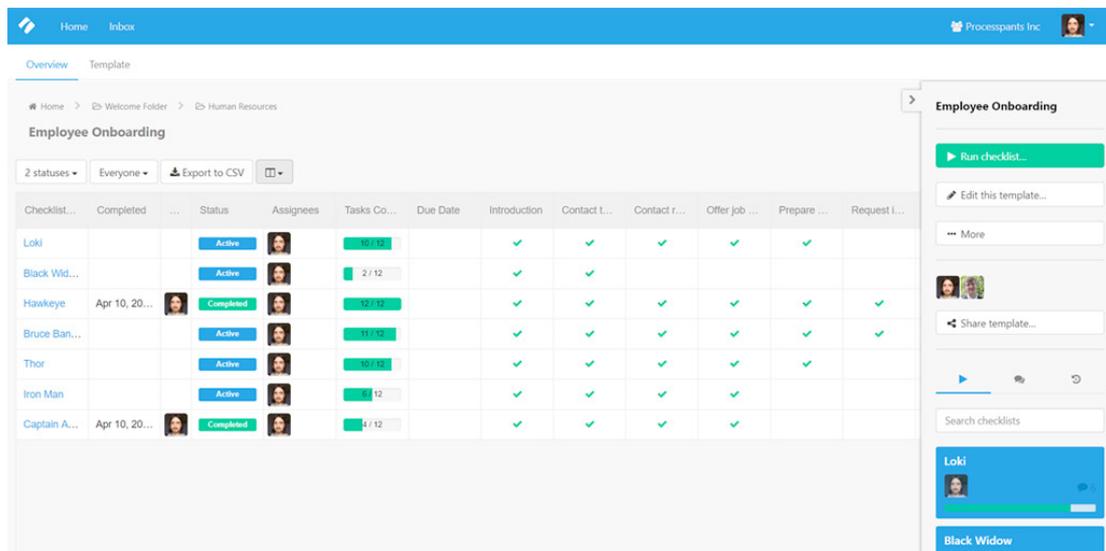
This can be done with standard programs like Microsoft Word, but a dedicated BPM tool like Process Street helps avoid confusion and management issues down the line by giving your organization a unified home for its processes and process data.

With a BPM tool, you'll be able to record your processes in a place where anyone and everyone will have access to the most recent

version of their workflows in a system specifically designed to help your team function at peak performance.

This covers your basic and process automation needs, but also creates the foundation for integration and AI automation. In other words, it serves as the hub for all of your automation needs.

Integrate your BPM system to automate further

Once you have a BPM system up and running, the next thing to do is to use integrations to link it to other platforms, programs, and services.

Since you've already documented your processes, you should be able to easily see where other programs can be integrated in order to save time and hand off menial tasks. Prime tasks to automate are data transfer, data management, task assignment, form collection, and meeting scheduling.

Going back to our support checklist example, you could integrate your BPM system with your support platform. That way you could have a support checklist automatically run whenever a new support conversation is started, and data such as the person's name, company details, and messages could be automatically pushed into your checklist.

That way your support technicians would be able to work through their checklist without even having to open your support platform, letting them stay inside a single app and maintain focus. You could even automate posting the response by having your team record their message in the checklist, then having it pushed back into your support platform automatically to save even more time.

This is a great way to make your BPM system even more powerful, and if you use third-party services you won't need any coding knowledge. However, it will require you to have a solid BPM system set up already, and any third-party software or service will add another expense to your list.

Use AI automation

AI automation is achieved by involving an artificial intelligence in your integrations – it acts as a layer between the data source (like your support system) and the destination (a database, for example).

It can handle tasks that would usually require human logic or reasoning, like identifying the language of text, categorizing images, making predictions, and detecting emotion. Here are just a few areas that you could apply AI to:

- Customer support: detecting customer emotion, routing tickets to the right rep based on language

- Operations: analyzing large data sets and summarizing the findings in a human-readable report
- *Marketing*: predicting which kinds of leads are most likely to convert so you can optimize your targeting
- Sales: determining the best time to call a prospect based on similar cases

Start off simple; set up your BPM system

All of this can be overwhelming, so it's important to start somewhere simple. At the very least, you need a BPM system so you can store and track the processes you'll automate.

Better yet, this will also mean that your processes will be documented, making sure your team always follows the correct method to perform their tasks, and making it easier for you to assign, manage, and track their progress.

You can do all of this and more by signing up to Process Street today. From documenting processes in rich templates to viewing an automatically updated overview of your team's progress, Process Street is designed to meet all of your process and automation needs.

Eager to streamline your processes and automate your team's tedious tasks? Request a demo today.

Three core business processes
you can start automating today, and how

According to IDC, inefficient workflows can cost up to 30% of your total revenue every year.

Without automation, your team is responsible for wasting your budget instead of over-delivering quality work at a lower cost.

Team members that mainly do data collection and data processing – like a HR assistant or bookkeeping clerk – could use automation to handle duties that take a staggering 51% of their working hours.

With an extra 20 hours per week per team member spare, imagine how much more value-creating work they could do.

You can lead a happier, more productive team that runs with fewer clerical errors by implementing business process automation. To demonstrate, let's go over three examples of processes you can automate, and see how you can automate them:

- Customer success (client onboarding process)
- HR (recruitment process)
- Support (customer support process)

All of these processes will be given in full, and by the end of this book you'll know how to eliminate inefficiency by using basic, process, integration, and AI automation.

Customer success automation example

According to research by Gainsight, 70% of your customers – the ones that have recently been acquired and onboarded – are at high risk of churn. You might be able to easily manage the 30% that are already retained, but what about that huge chunk that aren't?

Automated customer success can reduce the need for a massive team of customer success managers and keep your metrics healthy by ensuring your team can spend time on high-touch work like

onboarding rather than data entry.

Let's look at the old, manual way of doing customer onboarding and then how we can improve it with automation.

Customer onboarding – the old way

A traditional customer onboarding process might look like this:

- Lead converts into a customer
- CRM entry is updated (/created) to log the new customer
- Customer value assessed and employee chosen with proportional experience for client onboarding
- Employee is tagged in the customer's CRM entry to make them easy to find
- Customer onboarding is performed

While this fulfills the basic requirements of onboarding, it is open to error. In this process, there's too much reliance on employees communicating information to each other, which creates bottlenecks and oversights.

The amount at risk for every $1 billion spend on a project.

Total dollars at risk:

$135 million

56% is at risk due to ineffective communications

$75 million

For example, the Project Management Institute has indicated that 56% of all funding considered "at risk" in company projects ($75 million for every $1 billion) is due to ineffective communication. Information is lost, forgotten, or confused, and there is nothing in this traditional process to solve that.

This means that the success of the entire operation is left down to a single person's memory and the chance of human error.

Why not automate it?

Automated client onboarding

In contrast, an optimized and automated client onboarding process would look something like this:

- Lead converts into a client
- Lead status updated in CRM (Salesforce)

- Client onboarding checklist automatically triggered to run in Process Street
- Client information automatically pushed into the new checklist
- Basic onboarding material automatically sent to client in an email
- Employee checks their Process Street inbox to see what they need to do
- Employee performs the client onboarding process using the instructions provided in the checklist

Compared to the manual version, much less of this process relies on inefficient communication, which limits the risk of human error.

Communication isn't an issue because all of the steps that would require it (e.g. telling the employee to perform client onboarding) are now automatically taken care of as soon as the client status is updated. No information is lost during these steps either, as the onboarding checklist is automatically populated with all of the relevant information.

Not to mention that this makes client onboarding easier to track and review as a manager, as all you have to do is use the template overview tab in Process Street to get a summary of every checklist run.

Human error is also less of a problem, as the employee is no longer relying on their memory in order to carry out the client onboarding process. Process Street checklists are made up of tasks which can be as detailed as needed, including direct instructions, supporting materials, and much more.

None of this is difficult to set up either. To automatically run a checklist and populate it with information, you can:

- Create a custom button inside Salesforce using checklist run links and variables (click here for instructions)
- Integrate Salesforce and Process Street using third-party software (such as Zapier)

As for setting up your checklist in Process Street, import our pre-made client onboarding process. It's ready to use as it is and completely free to import. Plus, if it's not suitable for your needs (e.g. you're not a marketing agency) then it still serves as a solid base which you can edit to your heart's content.

HR automation example

The US Department of Labor estimates the cost of a bad hire to be 30% of the employee's first year of wages. Add to that the

estimated cost of employee onboarding (according to leading recruiters) being $240,000, and that a heck of a lot of money to waste on bad hires or ineffective onboarding.

Beyond that, bad recruitment practices (and therefore bad hires) disrupt your existing team and make them less efficient, doubling up the overall cost in terms of productivity.

That's why the hiring process is the next of our automation examples.

Hiring – the old way

A traditional hiring process might look like this:

- Current team needs to expand, or a new role is required
- The decision is made to hire a new employee
- One employee is assigned to write a job description
- The job description is posted in all relevant areas (websites, newspapers, etc.)
- Job applications are collected
- Initial checks are performed to eliminate unsuitable candidates
- Thorough checks are performed to assess the most suitable candidates
- Interviews are conducted

- The best hire is chosen (usually via manager decision)
- Employee onboarding is performed

Again, this recruitment process will certainly fulfill the basic hiring needs, but the vulnerabilities and inefficiencies in this process make it almost unsustainable at an enterprise level.

Problems with the traditional approach include:

- There's no way to standardize/easily monitor the job description
- There's no guarantee the job will be posted in every relevant area
- Job applications have no central location stored, and can therefore be lost
- The entire screening and interview process relies entirely on employee accountability (which is not enforced)
- The steps in employee onboarding are vague and inconsistent between employees

Automated hiring process

An automated hiring process would look more like the following:

- The decision is made to hire a new employee
- A hiring process checklist is run in Process Street

- An employee selects the department and position being hired for using a drop-down menu in the checklist
- The checklist updates to reflect the required tasks to effectively recruit and onboard this type of employee
- Pre-written job descriptions are provided, letting an employee copy it directly into all relevant locations (which are also documented)
- Applications are stored in a central location, such as a set Google Drive folder
- Checks are performed as normal, but each round of checks is automatically assigned to specific employees in Process Street
- The interview task contains a link which is clicked to run fresh interview checklist for every candidate
- Interview responses are recorded in the checklist to centralize all information
- The employee onboarding process is automatically run when the hiring process is completed
- All relevant information is pushed through from the hiring process to let onboarding begin immediately

As with the client onboarding process, this automated process relies much less on memory, is more consistent in execution, and largely eliminates human error. By doing this you can ensure both that's you are hiring the right employees and that employee onboarding will be as successful as possible.

Here at Process Street, we have both a recruitment process and an employee onboarding checklist ready to use for free. They're ready to use as they are, but can also be edited to suit your specific needs.

As for how to set up a checklist which adapts to suit the information you enter (e.g., customizing the hiring process based on the required employee), conditional logic allows you to set rules for your checklist to follow. For example, you could hide most of your tasks by default, then show sections related to various options in an initial dropdown form field.

The following also contribute to making the automated hiring process much more reliable in an enterprise setting:

- The checklist automatically assigns employees to their relevant tasks to enforce accountability
- Due dates are automatically set to let employees know when they need to work on each task
- The process itself can adapt based on the department and position being advertised to encourage more suitable applicants
- Any actions and current progress can be checked at a glance by the team manager to ensure transparency in the process.
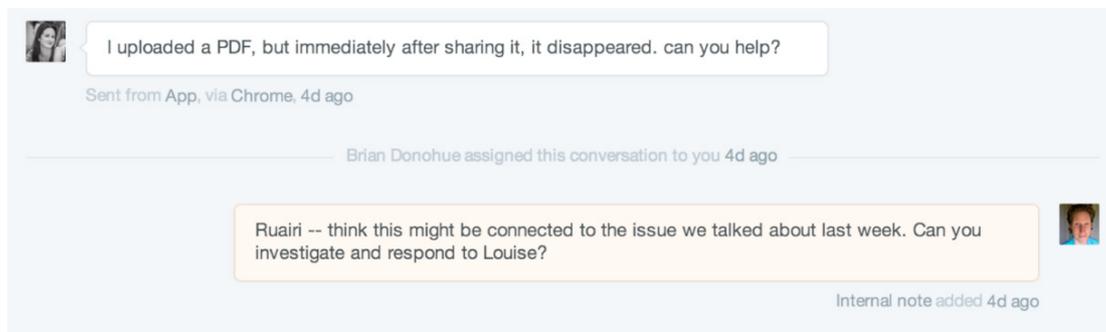
Support automation example

Bad customer support costs businesses more than $62 billion every year. The problem? 73% of customer support professionals report that the most challenging issue is managing their time and workload.

Other top causes of this include a lack of proper training and customer receiving incorrect responses to their support.

So, let's solve those issues, shall we?

Customer support – the old way

The traditional customer support process is as follows:

- A customer reaches out to your support channel with their issue

- The employee at hand receives their message (through phone, email, in-app messaging, etc)
- They attempt to solve the problem to the best of their ability
- If unable to do so, the customer is passed onto a more experienced team member
- The customer repeats their issue to the new technician
- The technician attempts to solve the issue with their more specialized knowledge

This process repeats until a solution is found, the customer stops responding (or hangs up), or an explanation is found and the customer notified that the issue will be worked on (e.g., a new bug is discovered in your software).

The problems with this traditional process are immediately obvious:

- The customer has to repeat their issue to every employee
- Response time is variable and entirely dependent on the support technicians available
- Individual support cases are not tracked, making it next to impossible to see where problems are occurring
- Hand-off between technicians is unpredictable, causing further delays
- Solutions are entirely dependent on the knowledge, experience, and understanding of the support technician

Automated customer support

To solve these issues, the customer support process must be standardized and monitored, while giving technicians access to all of the information they might require.

Thus an automated customer support process consists of the following:

- A customer contacts your support team with an issue
- Your customer support checklist is automatically run in Process Street
- Customer information and their message are automatically pushed into the checklist
- The support request is prioritized based on the value of the customer
- The checklist is automatically assigned to a low-level support employee
- The employee opens the checklist and categorizes the type of issue (technical, payment, feature request, etc)
- The checklist automatically updates to show instructions for dealing with that type of issue
- The employee replies immediately with either a solution or to let the customer know that they're looking into it
- If the employee cannot solve the issue it is escalated to a senior support technician and the customer is notified

- The senior technician is assigned to the checklist and can immediately see all relevant information to solve the issue

By doing this, customers only have to state the issue they are having once, which creates a much better support experience. Not only that, but without having to chase down relevant information or instructions for dealing with specific issues, low-level support employees are able to give much quicker responses and are able to solve more issues.

Research indicates that employees spend 20%-40% of their time manually searching for documents. So, by having all of your instructions, solutions, and relevant information in a single location, you're effectively letting your employees spend 1.25x as much time actually solving customer support issues.

Low-level technicians being able to handle and solve more support issues also allows your higher-level technicians to focus on the cases where they are actually needed. This, in turn, provides a much more successful and pleasant support experience to your audience, helping to cement people as return customers.

Stop wasting time and start automating your enterprise

Automation doesn't have to be intimidating, because there's no downside to deploying it in your organization. It won't replace your team members, but instead make them more effective at their jobs – removing menial, repetitive tasks and streamlining their processes.

Research also indicates that 81% of UK companies will need greater automation by 2020 in order to cope with their increased workloads. This means that, for many, automation isn't just a way of saving huge amounts of time and money – it's essential to staying competitive and running a profitable business.

Not sure where to start? Don't worry. Process Street has a huge number of tutorials on our help site, and by signing up for a free account or requesting a demo today you'll be able to access our premade process templates and get a head start on documenting and optimizing how your business runs.