BUSINESS AUTOMATION PRIMER

How to increase company productivity by extending automation of your current business systems.

ClearMeasure

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This white paper is for business leaders seeking productivity gains by extending current business software to automate repetitive, time-consuming manual tasks.

It's also appropriate for any of the following scenarios:

- If you installed or inherited a business computer system that is mission-critical to your daily operations
- If your system is in need of ongoing maintenance and changes
- If your system has other workaround processes that have grown up around it in order to fully leverage the system to its full potential

COMPUTING ENVIRONMENT

Every business has long-term customer, vendor, and partner relationships. Chances are you are set up for long-term relationships with these key entities, and they know your people by name. You probably also have several computer systems in place, and when they go down or experience disruptions, daily operations of the business are impacted.

Some of the processes that have grown up around these key systems may very well be manual and labor-intensive. Perhaps keeping the data clean, complete, or up-to-date has required the attention of several of your personnel or perhaps too much attention from one of your key professionals. While your computer system is very valuable, perhaps it also doesn't automate the full business process like it should. Or it may be one that's been in operation for over 10 years and hasn't been extended to support or automate new processes that are now part of your ongoing business operations. If that's the case, you may have a great computer system but the "last mile" of automation is not in place, and there is unneeded stress, labor, and error rates. In this environment, we recommend identifying the processes that occur outside of the system in order to extend the system and fully automate it. By completely extending and automating your key business processes, you will fully realize your system's potential value and your operations will take off.
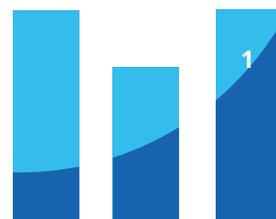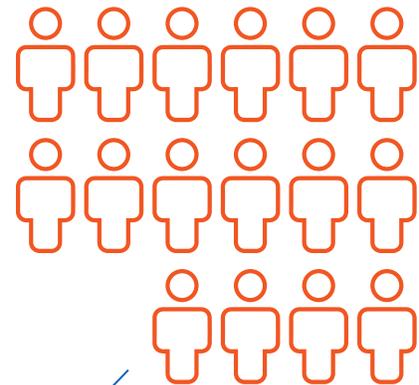
VALUE OF A COMPUTER SYSTEM

There are many types of computer systems including ERP, CRM, financial, operational, and many more. Whether or not you've implemented a COTS (commercial off-the-shelf) product, SaaS (Software as a Service) product, or have a custom system built just for you, it is there to automate some set of processes in the business.

MULTIPLE
SOURCES OF DATA

THESE PEOPLE ARE
ENABLED

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X

W

Overwhelmed
Associate
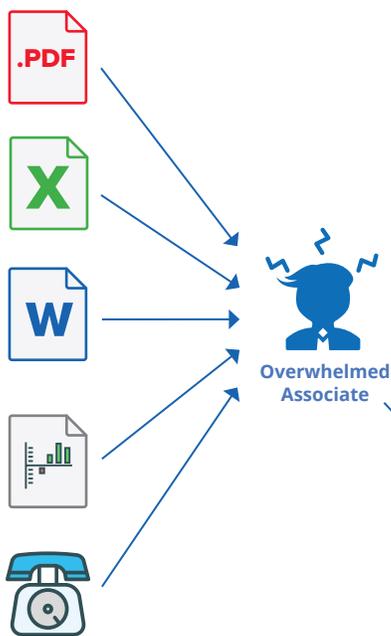
COMPUTER
SYSTEM

As long as this information gets into the system

The promise of a computer system is that if you track everything in the system, then the people in charge of executing key tasks will be greatly enabled. In addition, by tracking everything in the system, you are able to organize your workforce with a greater level of specialization. This increases productivity in each area, and it lowers labor costs as well.

When computer systems like this have correct and up-to-date data, the impact on the business is incredibly positive. Well-operating systems like these can provide a huge competitive advantage for companies large and small. Indeed, many businesses have installed multiple systems integrated together. In any event, every business computer system is one form of this value model.

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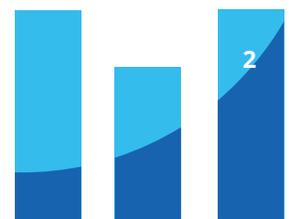
# COMMON REASONS FOR MISSED VALUE & MANUAL WORKAROUNDS

It is very common for a computer system to miss delivering on some of its promised value or for opportunities to be missed as the years go by and the business continues to evolve.

While computer systems can fulfill their full mission when all processes are contained and managed, they miss opportunities when:

Data is missing · Data is incomplete · Data is wrong · Data is improperly formatted · New processes emerge outside the system

Companies looking to receive the benefit of the computer system can do so only when they trust it. When the system is wrong or not up-to-date, professionals inside the companies learn that they can't depend on it. Perhaps they know when the system is wrong and know exactly who to call to ask them to "load and update" so that they can perform a needed process.

As the years go by and your business evolves, it's common for new processes to develop. Your fantastic workforce may have found innovative ways to execute these processes and work around the fact that the system doesn't support 100% of their needs. Over time, you may have seen these side-processes crop up at a higher rate than they can be incorporated into the system. In some cases, those responsible for maintaining the system may have added custom fields or incorporated the process in some incomplete way.
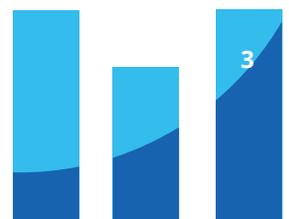
If these systems provide the most value when the data is correct and complete and they fully support all key processes, then the way to maximize their value is 1) to identify all sources of data errors and 2) fill automation gaps in key processes.

The following two scenarios focus on filling the gaps that cause the system to deliver less than the potential value. While users that use the system as a starting point for their work will have processes that can be incorporated as well, the following two scenarios focus on the left side of the diagram we examined earlier. This part of the diagram illustrates the assumptions of system value: that if the right information is in the system, then others are enabled. Both of these scenarios represent processes that have evolved over time, not brand new implementations. These processes exist to produce the data necessary to keep the system's records up-to-date. By extending the system to incorporate this process into the system, we also address the out-of-date or bad data issue.

Scenario 1: Complex Orders

This scenario imagines an organization that has long-term customers, each requiring extremely complex orders. Manufacturers of fire engines and other specialized equipment would certainly fall into this scenario as would commercial distributors of all kinds of goods.

Customers know who their account executives are. They send in orders in various ways, chief among them being email. The document attached to the email might be something like:

• A scanned document
• Excel spreadsheet
• PDF order from their own system
• Faxed copy of their requisition

COMPLEX ORDERS
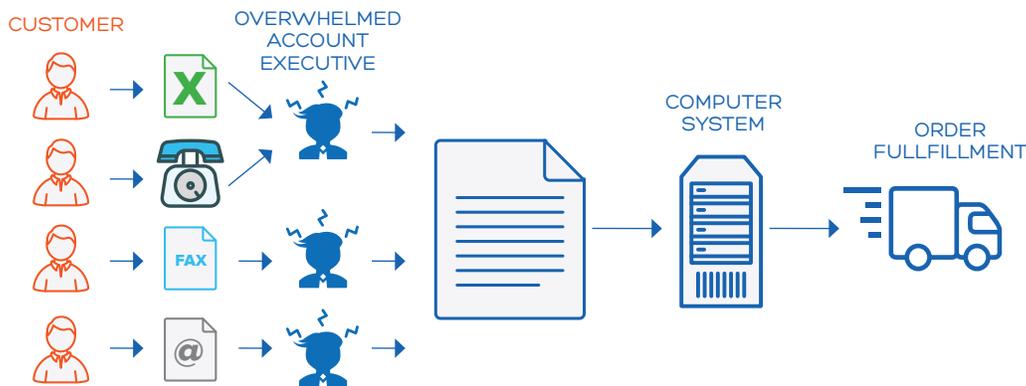
The account executives are not only great salespeople, but they also have had to become expert clerks and typists. They have created a process that they own, and each account executive probably has some individual tools and methods in order to be successful. They have learned how to:

• Validate the data in the order against common errors
• Normalize customer SKUs/descriptions with the company catalog
• Filter out delivery and other instructions from order line items
• Catch an embedded change of address hiding in the order
• Enter data, lots of data, quickly

Solution

The solution is to extend the system with a tool for the account executive so that order entry time is reduced considerably. This tool can recognize the common order formats and automatically process most of the information so that the account executive just has to look it over before pushing it along.
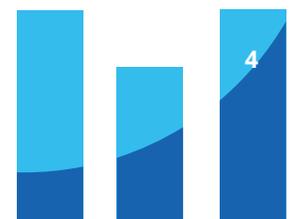
Scenario 2: Daily Operations Management

This scenario imagines an organization that performs either a high volume of projects or highly complex projects. Even a day of missed productivity can throw schedules or deliveries off the rails. The company depends on maximum visibility into what is going on and upcoming risks or delays. With the right field information in the system, operational managers can adjust to ensure all projects are completed successfully.

Project workers in the field report status and other information on a daily basis. Sometimes this is a very small piece of information, or it could be a fullreport. Each project worker reports to a projectmanager by way of:

- Email message
- Emailed document
- Excel spreadsheet
- Text message
- Other email attachments

This means that the project managers have become very good at:

- Reminding their project staff to send the report
- Collecting the reports
- Validating the reports are complete
- Normalizing the information into a format that can be loaded into the system
- Entering data, lots of data

Solution

The solution is to extend the system with a tool for both the project workers and the project managers. The system should allow the project workers to enter their reports from wherever they are. This tool should be able to:

- Validate the completeness of the report
- Remind the worker a daily/periodic report is due
- Notify the project manager

The tool for the project manager should allow for the management of a large number of project workers in an automated fashion. This tool should be able to:

- Notify him or her in case of missing reports
- Aggregate reports by project
- Allow project manager to review
- Expose a function to load reports into the system

In this way, the project managers can ensure the completeness and accuracy of the data while getting back a large portion of their day that was previously spent on manual processes.
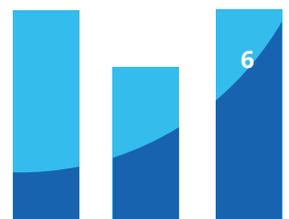
SUMMARY

Computer systems can promise a tremendous amount of value through the proper use of business automation. Fortunately, this value can be realized for any company. But all too often, however, processes develop around the system rather than being incorporated into the system. This causes a drift into a semi-automated environment that becomes less efficient over time.

You can see here that there are common patterns and solutions to fully automating business processes and taking full advantage of your computer systems.

Clear Measure is a custom software engineering firm that brings a clear, proven and measured approach to growing companies. We work with executives to manage their entire software engineering life cycle from technical strategy to 24-hour support. Many executives are concerned that their technology may not be keeping up with their competition, frustrated with their ability to scale systems & processes, or experiencing lost profitability due to inefficiencies in their software. We partner with mid-market companies to learn about their business objectives and are intimately involved in every stage of the engagement.