

Interactive Intelligence, Inc.

# Best Practices for Process Automation

Achieve early success with the processes your business automates

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## Introduction

Most businesses have a greater need for business process automation than they realize. And invariably, once a company puts business process automation into practice, the organization immediately identifies opportunities to automate other key processes. To set the best possible benchmarks for such initiatives, the trick is to automate and implement the first few processes, observe how they impact operations, measure their benefit, and then pursue additional opportunities using the standards you've established.

Like any new skill, learning the key factors that lead to successfully automating a process takes practice and experience. Here are some best practices that will help your organization achieve early success with business process automation.

## Utilize experienced consultants on your first one to three processes

Business process mapping refers to activities involved in defining exactly what a business entity does, who is responsible for a process, and how the success of a business process can be determined. Also known as process charting or flow charting, process mapping is likewise one of the oldest, simplest and most valuable techniques for streamlining work.

Yet mapping a process is subtle, and it requires experienced facilitators to get the best results.

Using the services of a consultant well-versed in facilitating discovery sessions, process automation, business process mapping and documentation will save you time and money when launching your automation program. Working with a professional in this area will also allow you to gain the knowledge, methodology, training and experience you need to perform future process automation projects. Once you learn the methodology and how to break apart a process into discrete steps, you'll be prepared to conduct process mapping on your own.

Experienced consultants to help  
with your process mapping

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Business Process Automation

## Start with simple processes

Keep things simple at first — don't choose to reengineer your most important, mission-critical processes at the outset. Instead, start with easier processes you can tackle, especially since you'll learn a great deal throughout the first few automation exercises, and leverage the acquired insights thereafter for more complex areas of your business. The goal, remember, is to gain experience. Moreover, you're not only learning how process automation works, you're learning how automating processes works in *your* company, with *your* people.

## Identify processes that provide a quick ROI

Ideal processes that qualify as "quick ROI" are the ones that focus on resolving widely-recognized operational pains, but that don't require buy-in or integration across multiple groups or tools within the organization. Involving multiple departments or heavy integration to other technologies can extend the implementation duration and increase costs. To justify the implementation costs and offer real business validation for continued deployment in other areas of the business, focus first on processes that require minimal approval outside of a particular group, yet still target highly visible problem areas.

## **Involve the stakeholders and get their buy-in upfront**

Deploying new technology can expose political fractures within an organization, with the biggest challenge being that people feel threatened by change. One such challenge is that business unit leaders might be concerned they'll lose control if an external organization or a new technology is seen to be dictating the way they do business. Similarly, line workers can feel threatened that they might be made redundant. From a change management best practices perspective, the project sponsor for automating a specific process must champion the initiative internally to smooth the way for change and assist with eliminating resistance to that initiative. The project sponsor must also help involve the key stakeholders in the project and help remove roadblocks to project execution.

As importantly, change management should be addressed throughout the life cycle of the process automation initiative. At project initiation, it's easier to get buy-in and create goodwill by showing business unit leaders how the change in doing business gives them access to more information and insight into their process operations, while also increasing productivity and/or reducing cost.

## **Document the “as-is” process before diving into the “to-be” process**

Word of wisdom for automating any business process: Spend time nailing down the existing “as-is” process first, and do so completely and accurately. This is a crucial step in that it allows you to capture the gaps, inefficiencies and pains you're going to fix in the “to-be” process.

Additionally, make sure the team of people you're working with have a well-defined methodology for tackling process automation. For example, are you spending time documenting your business procedures as they stand today before jumping into designing your “to-be” automated process? Are you taking time to analyze the throughput and cycle time of your processes to get a baseline of your current cost structure, so you'll know exactly what benefit your business will achieve from process automation? Both issues are critical because they allow you to derive an in-depth understanding of the current inefficiencies, bottlenecks and informational black holes you need to reduce or eliminate when automating existing manual procedures. That's why it's important to always make sure you capture error and exception handling steps in your methodology. They may be less frequent activities in automating a process, but they're the most effective in identifying where a process has the most gaps.

Ask yourself, too, do I have my current business procedures well documented today? Do I know and understand all of the work-arounds and exceptions? Understanding how your people really work will lend great insight into how you can improve the process.

## **Involve all key personnel in the current “as-is” process**

When describing an “as-is” process to your process automation consulting team, ensure that you involve subject matter experts from every point of the organization that touches the process. Without their input, ROI potential will diminish because you might well end up creating cumbersome, inefficient process flows or replicating the same inefficiencies you're actually trying to fix. Remember as well that processes evolve and grow along with your business. To facilitate this ongoing evolution, many companies establish a small team to oversee process automation, with team members representing all departments and workgroups involved in the existing process flow.

## Calculate the return on investment with each new process automated

Especially in the current business climate, a new technology purchase must have demonstrable ROI, and ROI is generally easy to prove if you've done a thorough job of documenting your current cost structure in terms of time and resources. A best practice here is to perform an ROI analysis on every process you automate. Each process has its own incremental return, and collectively over time can produce startling results.

### ROI calculators make Process Automation analysis a snap!

Let your Interactive Intelligence account manager or partner help you prepare an ROI analysis with our Process Automation Calculator

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Before you ever begin a process automation project, use an ROI calculator to help arrive at your anticipated ROI. The calculator is invaluable for converting a project's intangibles to tangibles by allowing you to understand potential increases in revenue or decreases in cost, which in turn allows for more effective options analysis and risk assessment. In addition, an ROI calculator lets you take the guesswork out of your calculations, and even allows you to make adjustments for conservative or aggressive views on

expected performance gains after implementing the "to be" process flow.

## Analyze other areas of your business

While automating those processes that are critical to your business, it's a good idea to analyze other areas and processes you plan to target for automation next — effectively creating an automation roadmap for your organization as a whole. Put your roadmap in place prior to beginning your first automation project, and it's that much easier to maintain momentum afterwards as you move on to the other processes you plan to automate. As is typical when you work through an initial automation project, the details of that first implementation will take up considerable time and attention. That's OK because you're actually paving a best practices path to subsequent process automation projects. However, you don't want to become myopic in your initial automation effort: creating a process that excludes consideration for other areas of your business will also create new gaps and inefficiencies where there previously were none. If you have a queue of processes to be automated, you must keep those integrations and intersections in mind to be successful in your overall business process automation initiative.

### About the Author

**Andrea Bennett** is a senior process consultant and project manager for Interactive Intelligence (ININ) and has been with the company since 2007. Ms. Bennett has more than 10 years experience in process consulting and is currently leading the consulting activities for ININ's *Interaction Process Automation*™ (IPA) product/solution initiatives. Prior to joining Interactive Intelligence, she spent several years in the CRM practice at Deloitte Consulting before continuing workflow design and process improvement in Industry. Ms. Bennett holds a Bachelor's degree in Management Information Systems from McGill University and a Masters Degree in Business Administration from the Richard Ivey School of Business, University of Western Ontario. She also holds a PMP designation.