

Action plan



Choose a business process that could be automated

Automating business processes allows leaders to collaborate faster and improve accuracy when it comes to forecasting and budgets. When it's implemented well, it's a great way to optimise processes, but rushing in can have the opposite effect. Take time to identify the parts of your business where automation could be beneficial and understand where the human touch is still necessary.

- **Effort:** Medium
- **Impact:** High

Actions:

Run a staff survey to get an overview of which tasks are most time consuming and identify manual or repetitive tasks that could be automated.

- **Impact:** High
- **Suggested duration:** 20 days
- **Why this will help:** Automation is generally best for routine and systematic tasks that follow a regular pattern – automating these tasks can free up staff to work on other aspects of the business. Talking to employees will give you a clear overview of what's taking too much time or causing frustration.

Review what's worked for others by speaking to business leaders in your network and learning from their experiences of automation.

- **Impact:** Medium
- **Suggested duration:** 15 days
- **Why this will help:** Looking at solutions implemented by other businesses is a useful exercise, as it allows you to see automation in action. Keep in mind that what works for another business won't necessarily apply to you – use this as a part of your research, not the key decision driver.

Send out a customer survey or run a focus group to find out which aspects of your business could be more efficient, and when your customers expect and appreciate human interaction.

- **Impact:** High
- **Suggested duration:** 30 days
- **Why this will help:** If you're considering automating part of your business that impacts customers, make sure they're on board. Use their feedback to determine what they expect from their customer experience.

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Draw up a shortlist of business processes that could be automated and run a SWOT analysis.

- **Impact:** Medium
- **Suggested duration:** 15 days
- **Why this will help:** It's important to understand the strengths, weaknesses, opportunities and threats associated with automation before you press ahead. Factor in employee and customer feedback, as well as potential costs and efficiency savings.

Choose a business process that could be automated and run a short pilot to trial it.

- **Impact:** High
- **Suggested duration:** 30-60 days
- **Why this will help:** Introducing too many new systems or changes at once can do more harm than good. Start small, then test, review and improve as you go.

How will I know if my action plan is working?

Way to measure success

Successful implementation

Why this metric?

You're now at the point where a successful implementation is the yardstick of your hard work and prudent planning.

How do I start tracking?

Continue to use the planning work here to reinforce what the technology has been brought in to do.