

HOW TO

# Identify Processes for Automation



Gartner predicts that “by 2025, 70% of organizations will implement structured infrastructure automation to deliver flexibility and efficiency, up from 20% in 2021.”

And yet, there are still so many organizations that lag behind and miss out on opportunities because they’re not sure how to get started with automation.



## What is process automation?

Process automation uses technology to streamline complex business processes through the automation of repetitive manual tasks and integration of data across multiple systems and services.

When designed effectively, process automation can be a powerful business investment that reduces costs and risks while maximizing visibility across an entire organization.



## Does this sound like your organization?

- Tasks are falling through the cracks and being forgotten
- You're missing a 10,000-foot view of your processes
- You lack meaningful reporting to guide improvements
- Processes take forever due to bottlenecks
- Customers are expressing frustration over your process
- You hire third-party compliance services to check your work
- It's a struggle to keep data current and accurate
- You're carrying out processes across multiple apps/systems
- Off-the-shelf apps aren't powerful enough for your needs

If any of these scenarios hit a little too close to home for you and your team, then this is your sign to step up and make a change.

Of course, we'll be the first to admit that overhauling legacy systems and processes at your organization isn't something to be taken lightly.



As leaders in the business process automation space, we would know. Since 1995, we at BP Logix have helped businesses transform the way they get work done with powerful digital process automation solutions.

In this guide, we'll walk through the benefits of automation and show you how to identify processes that are best suited for automation.

We'll also share some helpful tips to keep in mind as you take your next steps toward developing more efficient and speedy processes.

**Ready, set, GO** →

# The Benefits of Automation

There is a myriad of benefits of automating processes. Let's dive in and talk about five of the most impactful benefits.

## 1. Cost-savings

Automation requires upfront investment. It may be challenging to justify the additional expenditure in a budget, but this is one of those “spend money to make money” situations. In fact, Gartner's 2021 I&O Leaders Survey found that 80% of respondents said they considered automation as “a top tactic to achieve cost optimization.”

Automation helps organizations save money in the long run because it allows them to devote less money and resources to hiring, training, managing, and paying workers

In addition to reducing labor costs, automation also helps simplify compliance and prevent errors, which means less money is spent paying fees/penalties or hiring third parties to help you ensure compliance.

## 2. Speed and efficiency

Business processes can be quite complex and time-consuming, especially when they involve multiple steps or require collaboration across multiple parties. Output is directly tied to how fast a worker can manually complete a task.

Automation streamlines processes so your team can complete tasks faster and more efficiently. A task that might take hours for a human to manually perform may only take a few minutes with the power of automation.

**“It's cutting development time at least by half.”**

### Case study: Speeding up the transition to remote campuses

When COVID-19 struck and campuses were forced to go remote, one large public research university didn't miss a beat. University IT leaders turned to BP Logix's Process Director to ease the transition to remote operations.

With this powerful low-code process automation platform, the university was able to:

- Cut development time for forms/workflows by 50%
- Reduced use of paper forms and processes
- Move swiftly in response to unexpected events
- Improve the student experience at a critical time



### 3. Stronger data integrity

Humans make mistakes – it's a fact of life. Tasks fall through the cracks, typos are missed, and miscommunications are simply bound to happen from time to time.

Unfortunately, even an honest mistake can have a huge impact, whether it's a project delay, an unhappy customer, or a slew of fines and penalties. And of course, the more complex a process is, the more opportunity there is for a hiccup.

Data integrity and accuracy is especially crucial for organizations that must sync data across multiple systems and databases.



By eliminating manual data entry, there is less opportunity for error. Process automation technology is designed to integrate with existing data systems, so data is always up to date when changes are made in one system.



## 4. Employee experience

Many people assume that automation only benefits business owners, but it can also positively impact your workforce by enhancing the employee experience.

Instead of spending hours performing menial tasks and mind-numbing busy work, employees can flex their unique skillsets and take on more engaging and mentally stimulating work that leaves them feeling accomplished at the end of the day. Not only can this boost employee satisfaction, it also allows you to assign work that will add actual value to the organization.



## 5. Visibility and scalability

One of the major challenges of optimizing business processes is simply knowing what the process entails in the first place.








An example of this is when a single employee runs point on a particular business process. In the absence of a defined process documentation, the employee often develops their own way of accomplishing this task. This resourcefulness is admirable, but it can cause problems with continuity and scalability later down the road.

As your business grows, your processes must be ready to scale along with it. Unfortunately, it can be a major challenge to scale up one employee's preferred process. If that employee leaves the organization or needs to train other employees on the process, disruptions to the process may occur. It may be difficult to replicate the process for other users, or it may simply be an inefficient way to accomplish the task. You don't want to scale up inefficiencies.

Automation allows you to define processes, standardize inputs and outputs, and provide visibility for every step of the way. With process automation software, you'll have access to dashboards and tracking functionality that can help keep tasks on-track and enforce accountability. Visibility also helps managers keep an eye out for areas of the process that could use improvement.

# Identifying processes for automation

The benefits for automation are clear, but it can be challenging to determine which processes are ripe for automation. If your process requirements check any of the following boxes, there's a good chance that you might benefit from automation:

-  **Your process involves a lot of *repetitive manual tasks*.**  
*You want to eliminate mindless busy work and instead refocus employee energy on tasks that add value to the organization.*
-  **You must manage *large volumes of case and user data*.**  
*You need to be able to accommodate hundreds or thousands of cases and users (employees, students, customers, etc).*
-  **Your current process is *inefficient and time-consuming*.**  
*You're struggling to meet obligations to your customers or stakeholders in a timely manner, and your backlog of projects/cases continues to grow.*
-  **You are responsible for *handling sensitive information*.**  
*You need a secure way to handle trade secrets, financial data, and personal information.*
-  **You must comply with *rigorous regulatory and data standards*.**  
*You need to maximize traceability and quality control so you can prevent errors and close compliance gaps.*
-  **Your organization has *sophisticated routing & integration needs*.**  
*You have intricate approval processes and must integrate data spanning multiple departments or parties.*
-  **Your workflows require *advanced conditional logic*.**  
*You need a smarter system with workflow options that change dynamically based on specific attributes.*

A top 10 pharmaceutical company used BP Logix's low-code Process Director platform to build a faster, more compliant publication planning process.

Let's run our checklist against the challenges faced by the pharma company to see why publication planning is a perfect example of a process that is ideal for automation.



### **Repetitive manual tasks**

By automating several critical functions of the publication planning process, pharma organizations can refocus the time and energy of their medical affairs team to more strategic tasks that add greater value to the organization.

### **Large volumes of case and user data**

As the pace and volume of drug development projects increase, medical affairs teams must be able to keep up with the corresponding influx of publications requiring review and approval. There is also the pressing need to securely manage user data for reviewers of publications that fall under different disciplines.

### **Inefficient and time-consuming process**

The simple task of submitting a publication for review can be a tedious chore for researchers, but implementing a process automation solution designed with a pharma organization's unique SOPs in mind can reduce submission times from hours to mere minutes.



## **Handling of sensitive information**

Pharmaceutical research projects yield the “trade secrets” of a pharmaceutical company. To maintain their competitive advantage in the market, these organizations must be able to process their sensitive data and information securely.



## **Rigorous regulatory and data standards**

Pharma companies must comply with strict regulatory standards, such as ensuring FDA debarment checks for any publications in their hands. Running debarment checks can be incredibly inefficient and require cross-departmental coordination, but with the power of process automation, you can easily streamline this necessity.



## **Sophisticated routing & integration needs**

Publications can't simply be reviewed by just anyone. As pharmaceutical products become more specialized, they must receive oversight from experts in that respective discipline. Automating publication planning helps you ensure that publications are reviewed by the right people at the right time.



## **Advanced conditional logic required**

With how convoluted compliance and routing requirements can be, it's critical to build workflows that reflect that complexity. This requires advanced conditional logic.

# Tips for Automating Your Processes

So, you've reached the point where you know it's time to automate, but you want to make sure you're going about it the right way. **Here are the top five things you need to do to maximize the success of your process automation journey.**

## **1. Clearly define goals and desired outcomes**

When defining your goals for automation, it's important to think of them in terms of the desired output. Not simply "we don't want our employees to spend time on this tedious task" or "we want to speed up the time it takes it complete this process." What is the specific outcome are you looking for? Examples of specific outcomes would be measurable goals such as "reduce process completion time from 60 minutes to 10 minutes" or "automate 20 customer-facing forms."

Defining your goals in this way makes it much easier to prioritize which processes to automate first because you can ask yourself, "will this help us meet our goal of XYZ?" As we'll explain more in #2, having clear goals also allows you to benchmark your current status and prove ROI later on.

## 2. Have a plan to track and measure results

Because automation requires an upfront investment, the ability to calculate ROI is crucial. Before rolling out new efficiencies, be sure to benchmark your most important KPIs so you have concrete data to compare after implementing automation. This will provide a clear picture of the impact of automating your process(es).

When it comes to deciding which KPIs to track, revisit the goals and outcomes you defined at the start of your automation journey. Then think about what questions you want to be able to answer one year after implementation.

- How much time or money has been saved?
- Has there been an increase in deliverable output?
- Have users expressed satisfaction with changes?

### Benchmarks in action

A pet insurance company that processes around 9,000 claims per month was looking to speed up the turnaround time for customers submitting claims.

Before automating, it took up to 60 days to process a claim. After streamlining this function with BP Logix's low-code process automation platform, they were able to cut down their claims processing time to just 2-3 days.

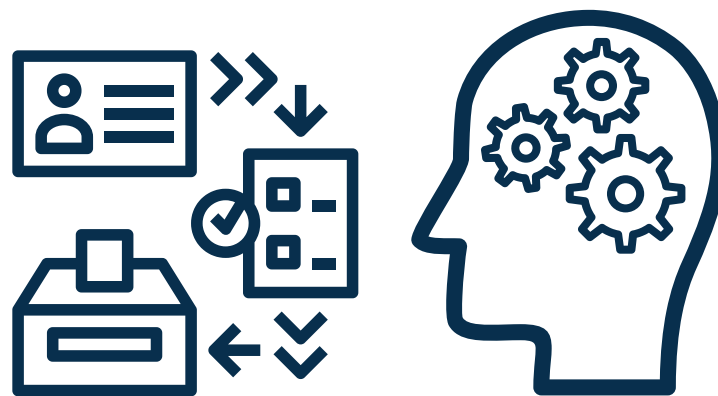
**By comparing this new turnaround time with their pre-automation benchmark of 60 days, the company can clearly attribute the 96% increase in claims processing speed to the investment they made in automation technology.**

### 3. Ensure your manual process is well-defined

Automation doesn't simply mean taking an existing manual process and putting it on auto-pilot.

A crucial part of the automation journey involves evaluating your existing processes and identifying areas of improvement. If an existing process is poorly defined and/or structurally inefficient, throwing automation technology into the mix has the potential to amplify those shortcomings.

To avoid hindering the potential benefits of process automation, it's important to take the time to define and review existing processes.



Don't be afraid to consolidate or eliminate certain routines that no longer serve your organization -- even if those practices have been around a long time. You want to make sure your new process adopts only the strongest parts of your old process, and "we've always done it this way" is not a good justification for continuing forward with it.



## 4. Consider impacts to everyone

A common mistake when automating a process is only considering how the changes will impact an internal group of stakeholders. Yes, that is a critical group to keep in mind, but it's important to remember that changes in your process can reverberate out to other parties. You must be aware of how changes to your process and technology affect your customers, other departments in your organization, or external business partners you work with, such as vendors and contractors.

If it's appropriate, find ways to pull these groups into the process design stage to share feedback and suggestions for improving the part of the process with which they are involved.

## 5. Understand your automation options

Not all automation tools offer the same degree of flexibility or power. While some business functions are simple enough to just bring in a SaaS solution, other business functions may be complex enough to require more bespoke low-code or custom development.

So, how do you know whether your business process is simple or complex? Think back to that checklist from page 9. If your process checked multiple boxes, there's a strong chance you may require a complex process automation solution.



Questions? We're here to help.

**Talk to one of our process automation experts today.**



**BP LOGIX**

We help you build, automate, and track any process imaginable.

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