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HOW TO DRIVE PROCESS IMPROVEMENT WITH AUTOMATION

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INTRODUCTION

Continuous process improvement can be made easier and more efficient with the aid of automation.

The process of continuous improvement is just what it sounds like – a method for constantly evaluating processes in order to make them better by minimizing waste and maximizing output.

As a business leader, here are some best practices geared towards helping your team and business prosper with automation tools that make process improvement straightforward, organized and manageable.

1

Be proactive

Implementing automation should be a top-down approach in any size organization because it requires investment, education and buy-in.

Management personnel and executives in the C-suite should have a firm understanding of what automation is being used to accomplish, so they can be involved in the process of deployment.

While it won't be necessary for the C-suite to conduct training, for example, it will be necessary that they communicate why and how their automation strategy will benefit the business overall and reassure employees about the ways in which automation will alleviate any burdens they may carry. This helps ensure that employees are aligned with the vision and are invested in the company's efforts.

Executive leaders and upper management should open the floor and listen to what employees need. By doing so, employees are empowered to design their own use cases for automation. This bottom-up approach for crowdsourcing solutions can then be met with a top-down approach of implementing automation to reap success.

2

Begin with end goals

In goal setting exercises, it's vital to envision what you want to happen a few months or years down the road. With a future time frame in mind, outline what you hope to accomplish. Then, you can work backwards as an organization to achieve these lists of goals.

By backtracking required activities to meet these goals, you can see what is currently missing or has to be improved upon to get there.

Factors that should be taken into consideration may include:

- Process assessment;
- Process roadmaps;
- Governance models;
- Change management plans;
- Key performance metrics.

Automation tools can help greatly in this step. With an automation tool, it becomes simple to track metrics and create reports. Such reports can be used to follow trends and pre-empt or modify any process that is not on the right track to hit its marks.

42%

more likely to achieve goals

You are 42% more likely to achieve goals when they are physically recorded.

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3

Identify processes that need to be automated first

Chances are you're running an organization with hundreds or thousands of processes. It would be less than optimal to initiate a new automation strategy and roll it out across the board all at once.

Instead, you can prioritize what processes need the most help by conducting a robust assessment. You can choose to implement automation within one department first. For example, the finance department is a good place to begin to see how automation can enhance processes. The finance department proves to be a great place to start with automation because the processes are bound to fit [automation criteria].

Processes that are well-suited for automation tend to be: repetitive in nature, rely on high amounts of data, and serve as catalysts or key pieces for other processes to be completed.

By using a pilot program and initiating automation for continuous improvement in one department, you can quickly review and remedy any initial flaws before including the entire organization.

4

Showcase how automation is beneficial for all

Successful continuous process improvement calls upon the need for engaged employees and the right software solutions. It also requires that executive teams and upper-level management showcase how important automation is for everyone, at every level.

Employees must feel valued and understand how their actions play out in the larger scheme of things. Inherently, within automation tools like Solvexia, you can design and map out processes so that each individual can clearly see their responsibilities.

By visualizing a process, an employee may be better able to see their impact from a widened perspective.

Furthermore, it's best to include your employees in the process from assessment to deployment. Since they are the people with their hands on the needle, their input should be considered of high value.

Bring employees into meetings and let them share their pain points.

Then, depict how automation solutions can alleviate those hurdles so that employees are incentivized to work alongside the technology.

5

Identify the best solution for the problem at hand

Again, the term "continuous process improvement" carries a lot of its definition in its name. The fact of the matter is that it's meant to be continuous, or on an ongoing basis. Innately, the assessment, review, implementation and testing steps are designed as trial-and-error.

With the right automation tool, you can assess your rollout of new processes in real-time and utilize analytics to assess whether they are flawed or functioning as desired.

If it happens that a pilot program undergoes a struggle, don't lose hope or give up. Simply, reposition your plan and team and try again. Your employees and team will prove to be pivotal ingredients to your success because their input helps to shape, execute and review how processes are performing.

6

Let success be known

Using process automation comes with a lot of components, both big and small. Since software can carry out a lot of the work with little intervention, it doesn't remove the necessity to showcase and praise success.

Continuous improvement generally does work in small increments, so it's not always easy to see changes. That's why it's so useful to leverage analytics and regularly check-in with your employees.

Whether you witness a small win or a big win, communicate it with your team so that they stay motivated. Allowing them to witness how their actions make a difference will breed a team that is invested and aligned with the overall goals of the organization.

To illustrate just one way to accomplish this with no extra effort, you can program Solvexia to automatically send reports to respective parties so they can track their metrics and see their improvements happening in real-time.

"Never underestimate the power of small consistent wins whose effects compound over time"

– Hendrith Vanlon Smith Jr

Which process to automate?

While automation software may seem complex at first, it really doesn't have to be. Tools are robust and powerful enough to carry out many of your needs, from running processes to conducting analysis.

Let's revisit some of the salient factors of processes that beg for automation.

Processes that:

- Are run frequently (daily, weekly, monthly, etc.)
- Take a fair amount of time to complete manually
- Call upon data from several sources (including legacy systems)
- Contain information that auditors review (i.e. financial statements)
- Have a key person dependency risk
- Maintain a high risk of human error (nature of data entry)
- Traditionally have required coding or IT departments to design
- Contain more than 10 steps to complete
- May change over time or need up-to-date documentation to be completed with accuracy

> These are just a few characteristics of processes that automation can manage. When it comes to deploying automation within your organization, it's best to always start with a single process within a single department. **Your financial team should serve as a catalyst**.

Learn more about how you can automate mundane and repetitive tasks so that you can focus on analysis and improving the business.

Download data sheet

A new direction

Many organizations are benefiting from [financial transformation] – or the application of automation technology within financial teams. This shift is transforming finance teams from having historically been tasked with data entry, bookkeeping and procurement of financial statements to holding a powerful and strategic decision-making role is changing how businesses operate.

With automation software able to complete many of the repetitive processes that a finance team is responsible for in the fraction of the time, finance professionals are benefiting from more free time to focus on high-value added tasks and functions.

Automation tools can take over performing [financial reconciliation], account close processes, invoice processing, forecasting, to name a few. This positions your financial leaders to have the time to provide insights and innovative ideas so that your organization can maintain its competitive advantages.

> Businesses across all industries are reaping the benefits of automation, from financial services to retail, fintech to travel.
> [Read the customer stories]

WRAP UP

Automation tools are growing in their adoption and necessity. These solutions can be used for continuous process improvement to help your organization **run more smoothly and efficiently**. To implement any new technology, the C-suite will have to be involved and supportive, from a financial perspective as well as a cultural perspective.

By engaging employees and showcasing how automation can help everyone on a team, it will be more likely to achieve goals and ensure that everyone is on the same page to maximize an organization's potential and capabilities.

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Solvexia is a low-code platform that automates spreadsheet-driven data preparation and manual processes.

It enables finance to free up their time by running processes 100x faster with 98% fewer errors, allowing businesses to reallocate essential resources to value-added work.

Finance and accounting teams choose Solvexia to unify data from systems and spreadsheets and automate their processes without involvement from IT. Its drag-and-drop interface makes it fast to deploy and easy to learn.

Solvexia combines and manipulates data, performs calculations and creates interactive reports, analytics and smart dashboards for richer insights for your stakeholders.

You can leverage Solvexia to automate hundreds of processes for your company, including reconciliations, revenue and expense reporting, regulatory compliance, rebate management and much more.

100x
faster processes

Positive ROI within 6-12 months

Modern cloud architecture

Works with existing systems and spreadsheets

Full **financial control** over your processes

98%
fewer errors

Drive process improvement with the help of automation.

Book a demo to see what Solvexia can do for you.

Book a demo today