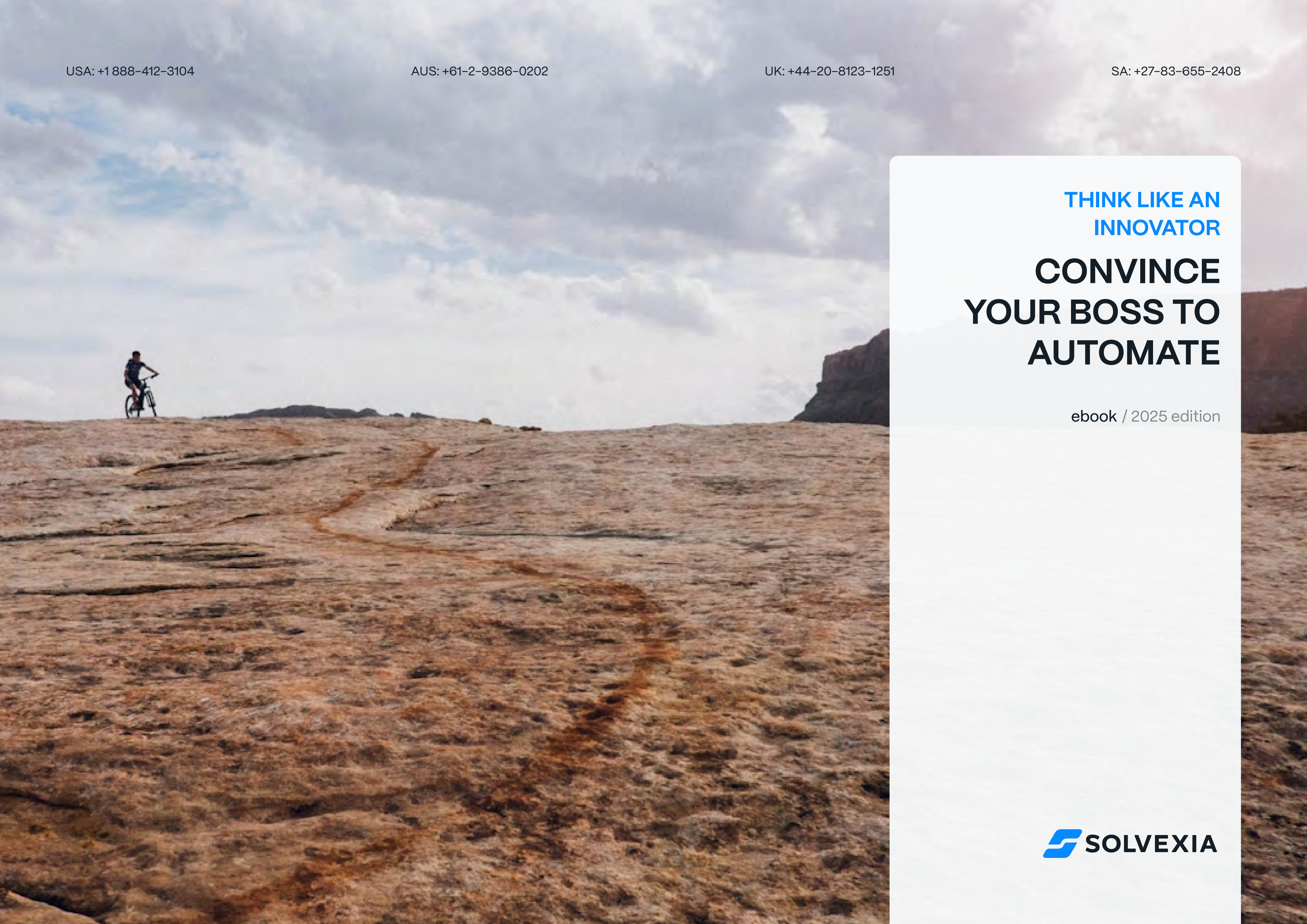

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THINK LIKE AN INNOVATOR

CONVINCE YOUR BOSS TO AUTOMATE

ebook / 2025 edition

SOLVEXIA

CONTENTS

INTRODUCTION

Automation can sometimes feel like an obvious solution to critical finance and accounting process issues. Particularly for stakeholders who feel the pain of manual tasks. This pain can include the monotony of time-consuming, repetitive data preparation and reconciliations, the stress resulting from manual errors in reports, and feeling overwhelmed from the burden of working on weekends at every quarter-end. Then, there is the potential embarrassment one can feel when having to explain avoidable mistakes arising from this manual processing with customers, auditors, and regulators. The list goes on.

Thus, it can be frustrating when the opportunity to automate is turned down or ignored by stakeholders and decision-makers. But why does this happen? And is there anything that you can do about it? The answer is Yes. While the **benefits of automation** are often clear, the goals and execution of projects to deliver this automation can sometimes feel overwhelming and risky. Many automation ideas fail simply because of a lack of focus from decision-makers.

In this eBook, we will draw on more than 15 years of experience driving high impact change with automation in leading finance and accounting teams from around the world. Using the **Solvexia automation platform**, we have helped teams reduce the manual effort for tasks such as **reconciliations** by as much as 90% while increasing the accuracy of their data and raising the overall level of visibility, control, and governance of critical processes. Unlocking these profound benefits is only possible if you convince your peers and stakeholders to start automating.

01

Understand your company using empathy

The desire to automate is often driven by pain and ambition. The pain of wasted time, job dissatisfaction, errors, rework, missed deadlines, and late nights. The ambition to do things differently and better, to grow and improve, to impress and succeed. But these reasons, although compelling to the person asking for automation, can fall flat when presented to decision-makers.

While the reasons for automation are acknowledged, understood, and often shared by senior management, staff are left in a holding pattern, waiting for leadership to prioritize, support and fund automation.

While frustrating, this presents an opportunity to think about why this issue occurs and how you can ensure that your ambition to automate is aligned with your company's ambitions by:

- Realizing that automation is innovation
- And therefore considering how your organization responds to innovation and tailoring your message accordingly.

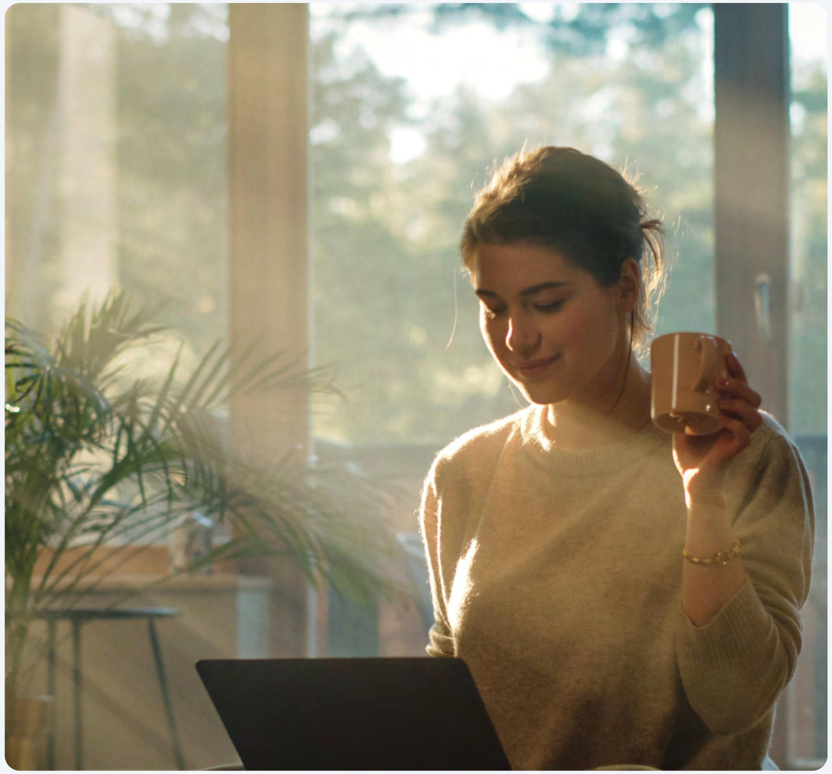
Tip #1

Realize that automation is innovation

Innovation occurs when you change an established approach through the introduction of new methods, ideas or products. Automation is therefore innovation. More specifically, automation is a form of disruptive innovation.

The idea of innovating can trigger different emotions and responses depending on a company's culture and the views of its senior managers. Highly competitive and progressive companies seek and embrace innovation, associating the term with creativity, success and growth. Meanwhile, more established and legacy environments may focus on the risk of failure and distraction from core activities.

All environments in need of and are amenable to automation (innovation). However, knowing your audience and the culture and habits that drive decision-making in your company is critical. A good way to do this is to use the product adoption curve.



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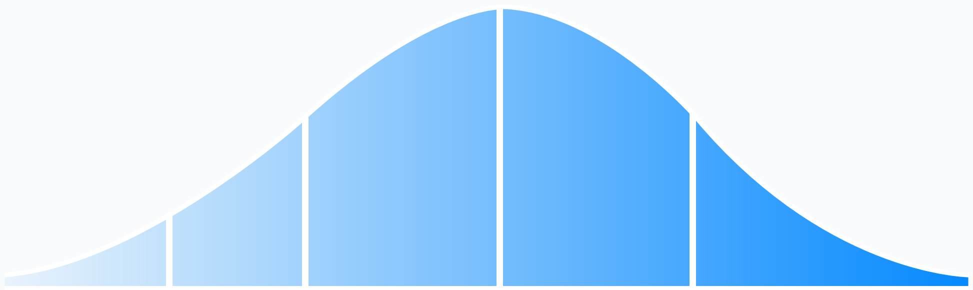
Tip #2
Use the product adoption curve

A useful tool to identify, understand and work with your organization's culture around automation and innovation is the product adoption curve:



Enthusiasts are the early adopters of automation. They want to be first and care most about trying new technology and tools. They need little convincing to try automation and are less interested in the realworld application of automation.

Visionaries are similar to enthusiasts, with the added focus on applying automation to solve real business problems. They are happy to work at a conceptual level (such as the broad scope of automation and features of tools) and can find use cases to apply the technology. Visionaries also focus on learning and educating others within the organization about automation.

Pragmatists are less interested in the theoretical benefits of automation and concepts. Instead, they seek practical solutions to problems that the organization is facing. Instead of tools and features, pragmatists need clarity on how your automation will address specific pain points for the company. They also look for evidence to back up claimed benefits, such as examples, case studies and proofs-of-concept.

Conservatives are similar to pragmatists in that their primary interest is in solving immediate and important business problems. However, conservatives are typically more risk-averse, requiring additional proof before committing to automate. Conservatives will also likely demand a positive return on investment (ROI) and a clear action plan for your automation.

Skeptics are the most risk-averse group. They tend to look for solutions that are traditional and mainstream. They will likely want off-the-shelf, tried and tested solutions or wait for IT or transformation programs to deliver automation. They need substantial evidence and convincing from people they trust to consider alternative approaches or new technology.

Tip #2 – Use the product adoption curve

Most people tend to be either pragmatists or conservatives (or a mix of both). The critical thing is to understand your company's culture and audience (colleagues, managers, executives, etc.) and tailor your message and plan of action accordingly.

By being aware of the categories into which the different decision-makers fall and tailoring your message accordingly, you can find the most effective ways to present automation to your team and management to guarantee their attention, focus and commitment.

It is important to note that people of all types can benefit from, and are able to be persuaded to adopt, automation. Furthermore, it is reasonable and prudent to have a mix of types involved in the decision-making process for automation.

Enthusiasts and Visionaries are critical for identifying the tools and technologies. At the same time, pragmatists and conservatives help to ensure that technology is being applied for the right reasons and is aligned with broader strategic objectives for the company, department or team.

Summary
Understand your company using empathy

Use product adoption curve

Use the production adoption curve to identify decision-makers as enthusiasts, visionaries, pragmatists, conservatives, and skeptics.

Promote automation as innovation

Tailor your message and approach to automation based on the types you identify.

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02

Identify your problem statement and solution

On problem-solving, Albert Einstein once said, "If I were given one hour to save the planet, I would spend 59 minutes defining the problem and one minute resolving it". Automation is inherently a method of solving inefficiency, scale and quality problems. Yet, many companies fall into the trap of jumping into tools and solutions too early. While often driven by fear and an eagerness to be "productive," this approach can result in wasting time and money while reducing the likelihood of project success.

In convincing your company to automate, failure to properly define the problem you are solving may confuse decision-makers or, at the very least, raise concerns regarding the risk that the automation will not deliver a desirable outcome. As pointed out in chapter one, most people (and therefore decision-makers) are pragmatists and conservatives and require evidence to support investment decisions.

Tip #1

Define your need and desired outcome

The first step is to articulate the problem you are trying to solve with automation. The goal is to keep things simple, ideally contained to one or two sentences. For example:

- We are looking to automate our bank reconciliation to increase efficiency, measured by an 80% reduction in a manual effort.
- We want to streamline and automate our financial modeling process to improve visibility and governance, measured by the introduction of audit trails and access controls.
- We want to replace our spreadsheet-based rebate management process to ensure scale, measured by the ability to calculate rebates in less than 15% of the time it takes to prepare manually.

37%

The primary cause of project failure, accounting for 37% of cases, is a lack of clear objectives.

Tip #1 – Define your need and desired outcome

Your statement should act as an "elevator pitch" to clarify the issue and highlight its importance to the company. To identify your elevator pitch, you must do three things.

Step #1

Specify the need by clearly stating a problem. It is important to focus on the problem and not the solution (this will come later). Provide contexts, such as the business process, team or department.

Step #2

Highlight your desired outcome from different perspectives, including your own and stakeholders. Make the outcome specific and measurable. This should describe a future ideal state. What will life look like once your automation is up and running? To define an outcome, you must fully understand the root cause of the problem you are trying to solve – a good way of determining the root cause is with the "5-Why's" analysis method.

Step #3

State the impact of the desired outcome on stakeholders to excite and motivate your company to consider how automation will improve life for everyone it touches.

Tip #2

Justify your need for the organization

Having defined your need and desired outcome, you must align your sentiment with your company. Decision-makers need a clear understanding of exactly how your proposed automation will help the company achieve its strategic objectives.

Compare your needs and desired outcome with your company strategy. To do this, you will first need to learn about the priorities and goals of your company and, importantly, the key stakeholders of your automation. This may require researching internal literature (e.g., company goals, updates, presentations, etc.) and engaging managers to learn about their priorities. Aim to answer the following questions:

- Does my desired outcome from automation align with my company's goals; and if not
- Can I re-position my desired outcome from automation to align with my company's goals?

For example, a desire to reduce the time required to prepare a reconciliation through automation may align with a strategic goal from the CFO to **improve the financial close process**. Another example is that the **automation of a regulatory report** may align nicely with a public statement from your company to improve its regulatory compliance posture.

In addition to aligning your automation with the company's strategy, you must demonstrate a plan for success and measurable benefits for the organization (not just for yourself). Who will be accountable for delivering the automation? How will you measure if that person is succeeding or failing in their mission to automate?

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Tip #2 – Justify your need for the organization

Clarify your problem statement further

Having a set of needs and desired outcomes aligned with company strategy is critical to convincing stakeholders to support your automation project.

To add further clarity, you can contextualize the problem further by answering the following questions:

- Have we tried solving this problem before? How?
- Have others tried solving this problem before? How?
- What limitations and constraints are there in solving this problem?
- Where does the problem begin and end?
- Who should we engage to help solve this problem?
- What skills and experience do people need to solve this problem?
- What requirements must the solution meet?
- How will different solutions be evaluated and compared?

Have any questions about how you can overcome your business problems with automation?

Get in touch

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Summary

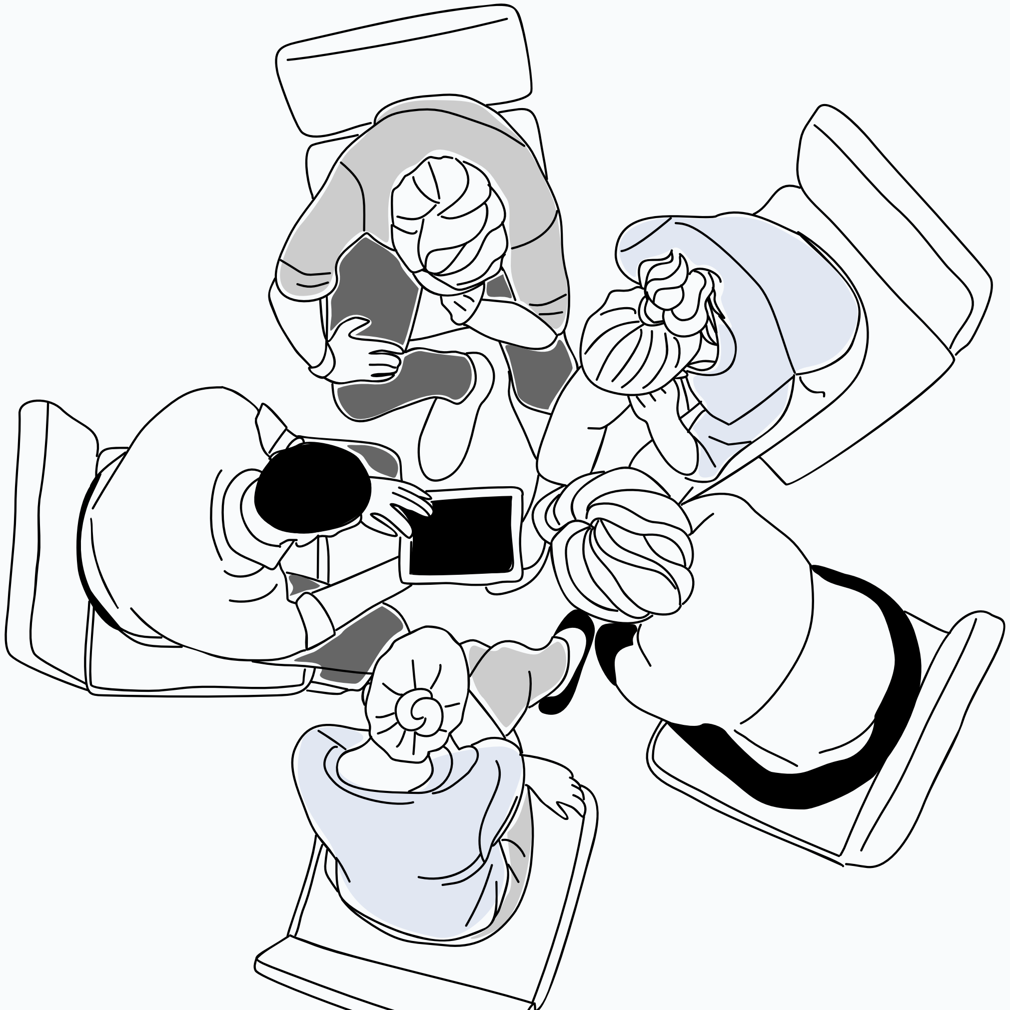
Identify your problem statement and solution

Define your need and desired outcome

To achieve this, define your basic need, identify the desired outcome from automation and specify the impact this will have on stakeholders.

Justify your need

Justify your need by aligning your need and desired outcomes from automation with your wider company goals and strategy.



03

Assemble your team and tools

Having a better understanding of your company and problem statement, you can consider the team and tools you will leverage to deliver automation. To do this:

- Rather than defaulting to automation "experts," look for people that want to learn (about your problem and the solution); and
- Select tools that align with your needs and goals and avoid the "shiny syndrome" (or gravitating to what is new and exciting).

"Major (transformation) programs are often forced on people, whether they are ready or not. The difference with FinEx is that we adapt to the people who want to change when they are ready to change. This is a much more effective way to innovate, rather than just throwing technology at people."

– Head of Finance Excellence, Global Employment Services Group

Tip #1

Seek learners, not experts

As discussed in earlier chapters, automation is a form of disruptive innovation and problem-solving. This can lead to the conclusion that only experts can deliver a good solution. This belief is particularly prevalent when automation is driven by less technical teams, such as Finance and Accounting. This can quickly become overwhelming, raising uncertainty and making it difficult to convince decision-makers that automation is an idea worth pursuing.

While expertise is your problem statement, desired solutions and tools are undoubtedly useful; it can also be a double-edged sword. In particular, relying on experts can lead to a fallacy known as "appeal to authority." Instead of forming a deep understanding of the problem, experts can lean on their authority to propose less than ideal solutions.

Instead of defaulting to experts, look for team members that demonstrate:

- A curiosity to understand a problem from different perspectives; and
- A desire to understand the root cause of a problem; and
- A keen interest in improving processes and driving better outcomes for all stakeholders; and
- A comfort with learning and working with new technologies.

Tip #2

Align your tool with your needs

When considering the right automation tool to solve your problem, you must first determine: who will lead and drive the automation (IT vs. Business); and whether the task is focused on automating data entry or data transformation. Based on your needs, you can select a suitable tool or technology:

IT-led automation for data entry is delivered using technologies such as Robotic Process Automation (RPA), Middleware and Integration Platforms. These tools often require granular access to company data and systems and need to be installed on-premises to get data in and out of your systems.

IT-led automation for data transformation can often be delivered via data platforms that leverage databases, data warehouses, data lakes and "Extract, Transform and Load" (ETL) tools. These tools are often championed by data engineering teams and support sophisticated data modeling using programming languages such as Python and R.

Business-led automation for data entry can be driven with Robotic Process Automation (RPA) through automating mouse clicks and keystrokes to mimic human operators to automate data entry tasks. RPA bots are installed on servers within your company and require access to different systems.

Business-led automation for data transformation (like Solvexia) is driven through no-code and low-code platforms designed to be managed by non-IT users. These products can connect to all of your data sources and offer a library of drag-and-drop tools to manipulate data into reports and dashboards. These products' core features are that they run on the cloud and require no IT infrastructure.

Tip #3
Avoid the Shiny Syndrome

Following the previous section, you must pick the right tool for the problem you are trying to solve. Companies can sometimes focus undue attention on ideas and products that are new and trendy, such as AI and Machine Learning.

Another way this manifests is in organizational transformation strategies that automatically assume a big-bang project (for example new ERP system) will solve every problem. Some symptoms of an organization distracted by Shiny Syndrome include:

- A focus on the novelty of making a change rather than the change itself.
- Technology vendors and product features define your needs (instead of starting with the problems you are trying to solve).
- The recurring issue of projects that don't finish while new projects are continually introduced.

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Tip #4

Find your Citizen Developers for business-led automation

Given the focus (for this eBook) being on business-led and business-owned automation, companies must also identify "Citizen Developers". These are people that, according to Gartner, "create applications and automation for themselves and others and report to a business unit or function outside of IT".

The advantage of modern business-led automation is its ability to be led and driven by people who possess a strong knowledge of the underlying business process as well as an interest in technology (and tools).

Examples of good Citizen Developers for business-led automation:

- Accountants or operations staff with strong Excel skills and perhaps even experience coding macros or running SQL queries against databases.
- Analysts and data engineers that work between business and IT.
- People with experience or a strong interest in analyzing, documenting and improving processes.

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Summary

Assemble your team and tools

Seek learners over experts

Avoid the allure of "experts" and instead measure the quality of your team through their interest in understanding the problem domain.

Tool should solve a problem

Focus on the right tool for your problem. While novelty is good to engage and excite stakeholders, don't let the technology define your needs.

Align tool with your needs

Pick a tool aligned with your strategy, particularly for the business area that will lead automation and the type of automation.

Find Citizen Developers

For business-led automation, find "Citizen Developers" that can help drive your automation.

04

Validate your idea

We all know that Amazon started as an online bookstore. What most people don't know, however, is that at the beginning, Jeff Bezos would manually purchase books from distributors and ship them to customers every time an order was received. As the idea was validated, it justified Amazon to invest in delivering a full solution (i.e., adding more products, acquiring warehouses, and so on). The takeaway from this is that ideas need to be validated, particularly if you need to convince others to back your idea.

While it is possible to jump straight into full delivery of your automation, decision-makers, particularly those that identify as pragmatists and conservatives (see chapter 1), need proof and evidence that your solution will work. A fast and cost-effective way to do this is through a prototype, such as a Proof-of-Concept (PoC).

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Tip #1

The power of a Proof-of-Concept

First and foremost, PoCs engage stakeholders. They help stakeholders and decision-makers feel like they are involved with the details of the automation you are proposing.

A PoC also helps people visualize a solution and even interact with a small sample of what your project will ultimately deliver. This allows for people to share immediate feedback. A crucial outcome of early engagement is that validating your ideas with your stakeholders increases the likelihood that they will buy into your project.

The second benefit is that a PoC reduces the risk of [project failure](). A PoC forces you to consider the details of your solution in greater depth. Also, early feedback from stakeholders (see above) increases your understanding of the problem being solved, surfacing new requirements and de-scoping others.

This impact is profound as it can translate to greater certainty on the budget and likelihood of success of your automation project. This will help raise decision-makers' confidence when presenting your case to invest in your automation project.

Tip #2

Validate automation with a PoC

A PoC is focused on delivering a small but tangible piece of the automation that can be used to demonstrate how the solution will work. By doing so, the PoC serves as a catalyst for building confidence in your automation, particularly with decision-makers. A PoC requires three things; The problem or process you want to automate, the criteria for measuring success, and the tools and team.

Tip #2 – Validate automation with a PoC

Problem selection

While you likely have identified a broader problem to solve with automation, the goal of the PoC is to deliver something of value quickly and cheaply. A PoC for automation should be something you can deliver within 24 calendar weeks. This means selecting a business problem that is small enough to be solvable in the desired timeframe.

Alternatively, you can carve out a smaller piece of a larger problem. For example, if your goal is to automate a financial reconciliation, the PoC can focus on a subset of accounts or a specific currency.

In addition to being feasible to deliver in 2–4 weeks, the problem or process for your PoC should also be:

- Well understood, either by you or the subject matter expert that you are liaising with. This will help ensure the likelihood that you will succeed with the PoC and avoid the risk of "garbage-in-garbage-out" (automating a bad process); and
- Is stable, meaning that the data going into the automated solution will remain consistent (in format and structure) and that the stakeholder requirements for the solution will hold true throughout the life of the PoC.

Tip #2 – Validate automation with a PoC

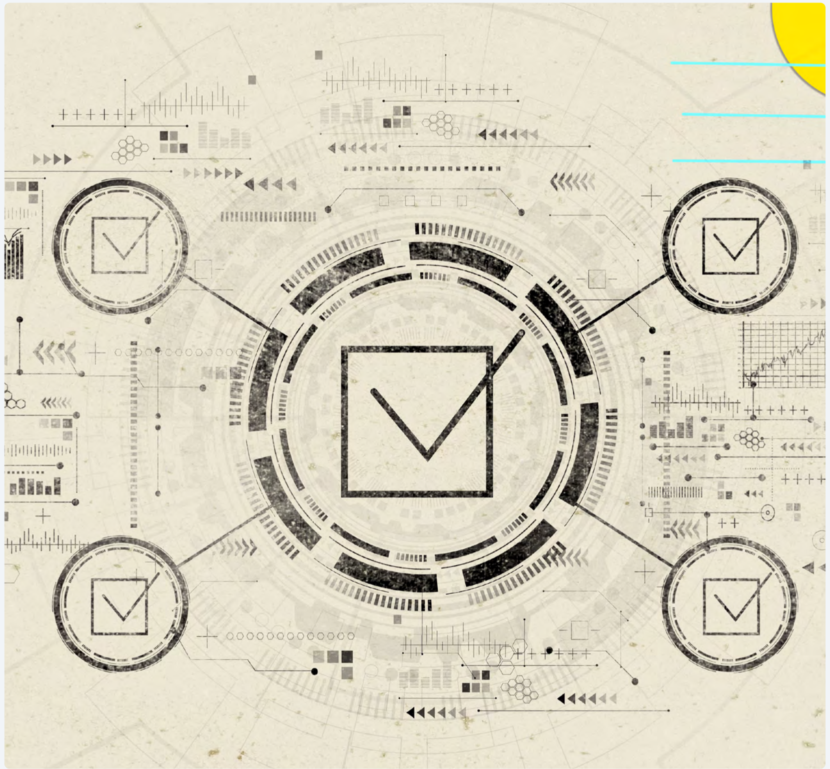
Success criteria

Your PoC must have a clear set of measures to determine its success.
A good way to achieve this is by listing success criteria. This should be a series of outcomes (between 5–10), written as simple dot points, that the PoC must deliver against.

As an example, imagine you want to prove the concept that a plane will allow you to travel from New York to London and meet all of your needs. Success criteria for a PoC might include:

- We can travel safely from New York to London in under eight hours.
- The total cost of the travel was less than $250.
- We received all of the information needed to travel via email or SMS.
- We were not hungry when we arrived in London.
- The travel was at least as comfortable as sitting on a train

Success criteria provide a "true north" for the team and help to ensure that stakeholders, including decision-makers, are aligned regarding the outcomes that the PoC will generate. They also help to ensure decisions to support your automation are based on data and evidence.



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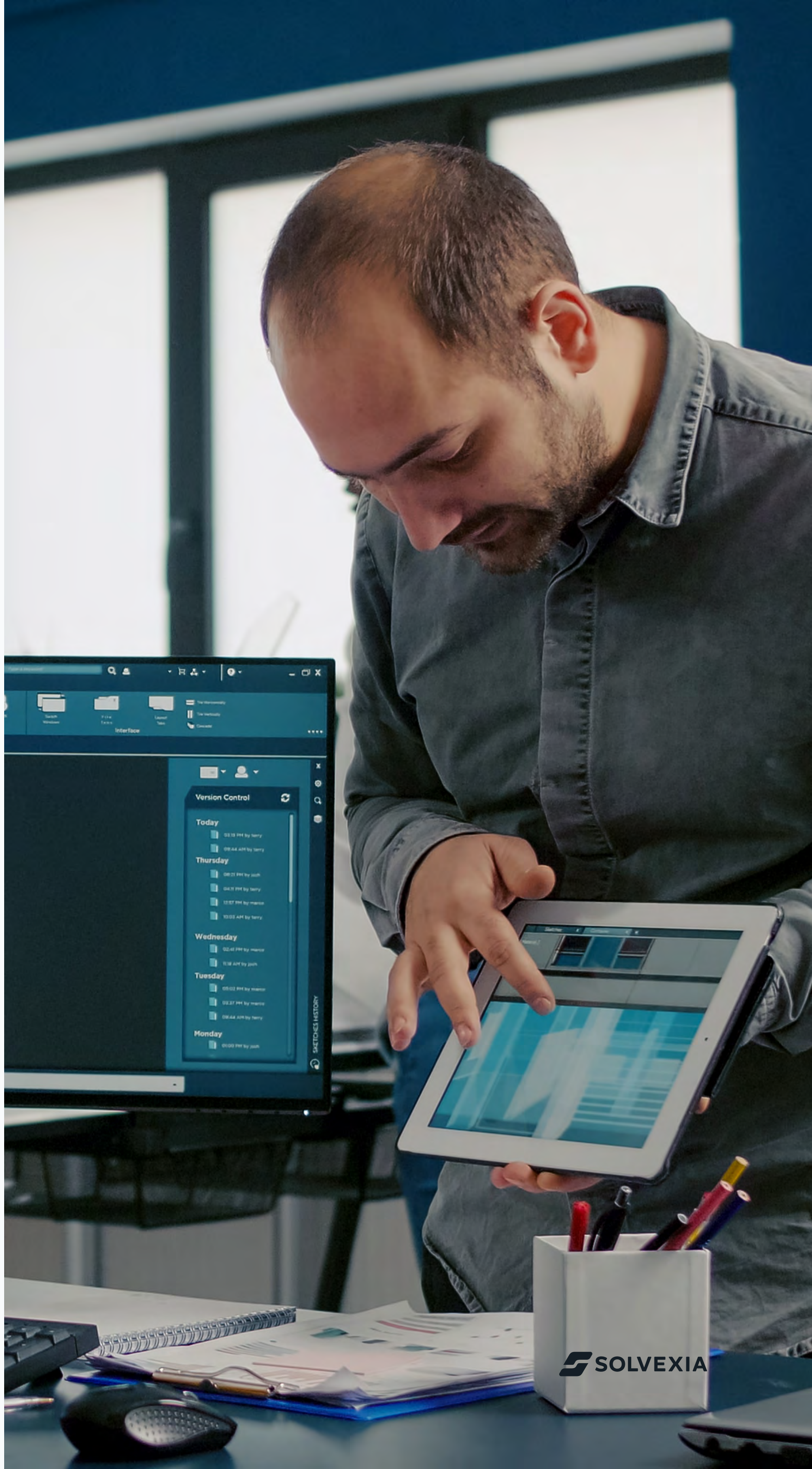
Tip #2 – Validate automation with a PoC

Your tools and team

In chapter 3, we described detailed methods for selecting your team and tools. A successful PoC will build on the discussion in chapter 3 with key additions.

First, the success of the PoC will depend on the speed and flexibility of your chosen tool. It is difficult to move fast and efficiently if your automation requires the IT department to create and maintain server infrastructure. This is where modern, cloud-based tools have a distinct advantage. You will need to engage the tool provider and work with them to find the most appropriate solution to allow you to deliver your PoC in the 2–4 week window mentioned earlier.

In addition to seeking keen learners and Citizen Developers, a PoC benefits from having creative and pragmatic people. This is not a time for perfection. The team delivering the PoC must be comfortable with fast, often imperfect, solutions. The team must also be aligned to focus on delivering to the success criteria.



Summary
Validate your idea

Select a process

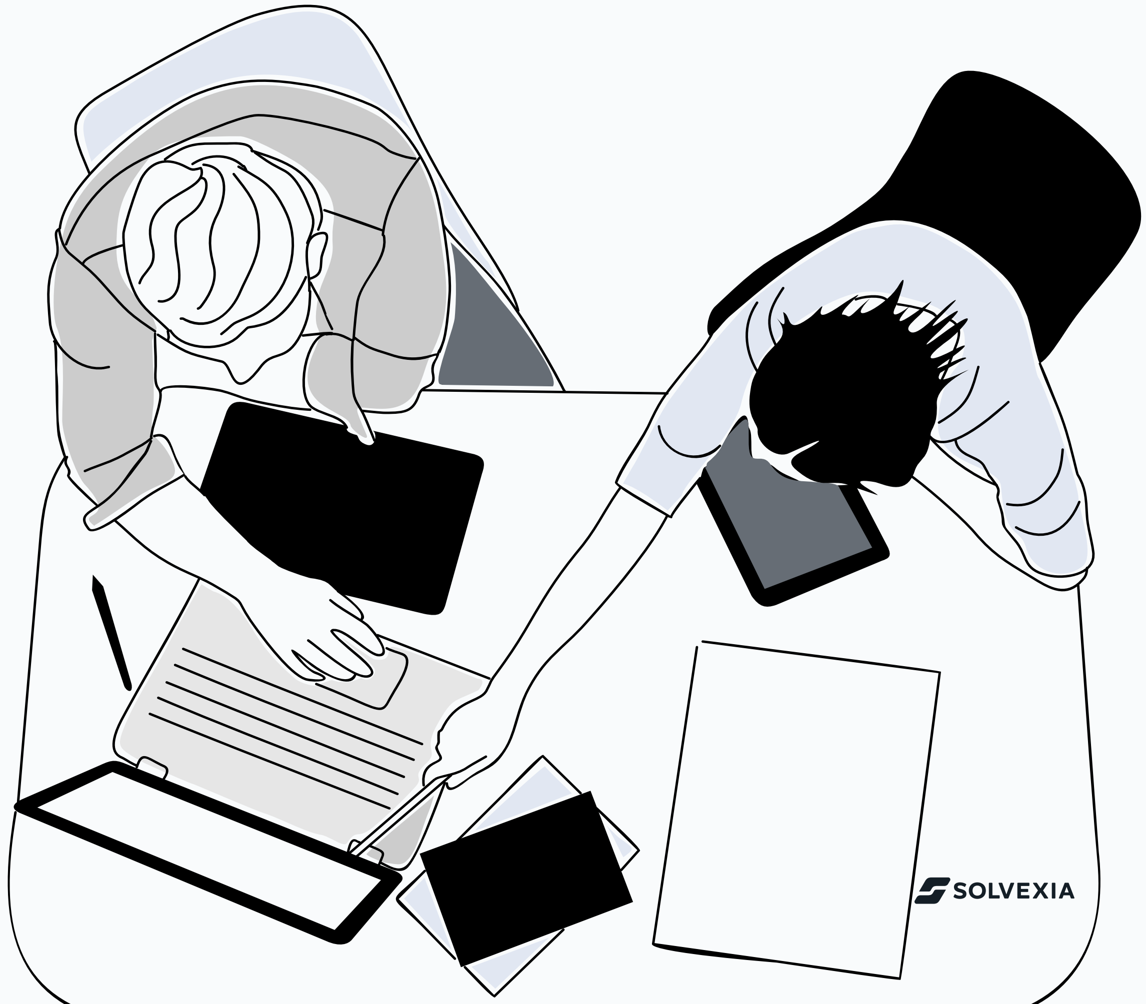
Select a process (or part of a process) that can be automated within 2–4 weeks.

Work with preferred tool

Work with your preferred tool vendors to ensure a fast and cost-effective PoC can be delivered.

Write success criteria

Write success criteria, simple and short dot-points outlining the outcomes that the PoC must demonstrate.



05

Pitch your idea

Sooner or later, you must present your big idea for automation to stakeholders. This presentation aims to convince and inspire your audience to support your automation. To do this effectively:

- Understand your audience and adjust your presentation, either leaning on "why" you want to automate or "how" you plan to automate; and
- Leverage the power of stories to convey your idea for automation and persuade decision-makers; and
- Manage your stakeholders in accordance with the power they yield and the interest they have in your project.

Tip #1

Choose between the "why" & "how" of your automation idea

There are two methods of framing any idea: by focusing on the purpose and ambition of the idea, that is the "why,"; and by emphasizing facts and laying out a clear plan for implementing your idea, the "how."

In the context of your automation idea, the "why" message may focus on your ambition to streamline work, raise job satisfaction and do more value-adding work. In contrast, the "how" will need to demonstrate your plan to deliver a working solution and the measurable outcomes you expect to achieve.

It is important to tailor your message to your audience. A recent study showed that emphasizing the "why" was more effective when presenting an idea to novices. That is, abstract goals and ambitions are important to convince an audience with a limited understanding of the problem domain you are trying to solve. Conversely, an audience of experts (in your problem domain) was far more receptive to ideas when framed on the "how."

One way to interpret this is as follows:

- When presenting your idea to stakeholders with less experience and knowledge about the problem domain (e.g., junior staff), focusing on abstract ideas and benefits is key to getting people on board.
- When presenting your idea to stakeholders with extensive knowledge and experience in your problem domain (i.e., managers), focus on providing a concrete plan with measurable outcomes.

Tip #2

Use a story to persuade your audience

Telling stories is one of the most powerful means of influencing, teaching, and inspiring others. In a business context, including automation, presenting an idea as a story helps encapsulate facts in an interesting and digestible way that creates a connection with your audience and can build a sense of familiarity and trust.

Start your pitch for automation by stating "what is"; the facts and historical pain points that have gotten you to this point. This can include things like:

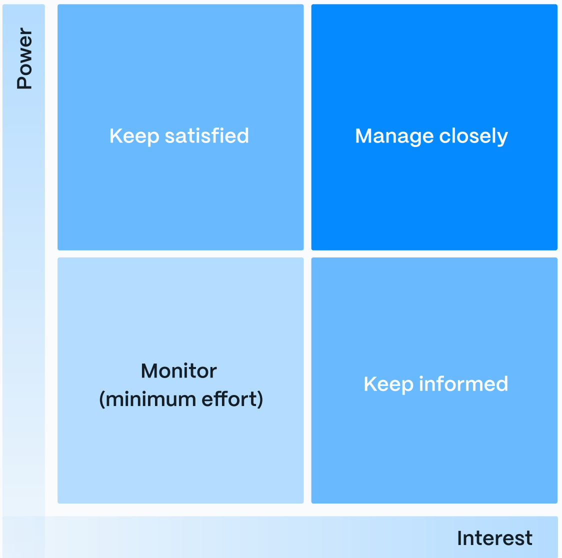
- The problems that arise from manual processing (e.g., wasted time, human error, etc.); and
- The implications of these problems (see point above) on stakeholders such as missed deadlines, job dissatisfaction and staff turnover, penalties and fines, and so on.

Inspire a call to action with "what could be"; give the audience hope for a future where the challenges of "what is" can be solved. How will life be different and better for the stakeholders due to your automation? This is the "why" behind your automation idea. Fill the gap between "what is" and "what could be" with your idea for automation. This is the "how" behind your automation idea. Provide a plan and proof points to help give your audience confidence that "what could be" can be achieved with your automation.

Tip #3

Use the power interest matrix to manage stakeholders

When presenting an idea, not just automation, the management of stakeholders is key and can easily become overwhelming. Many company decisions are made as a group, and automation is no different. Therefore, it is important to have a way of prioritizing the demands of your stakeholders. A simple way to do this is with the Power Interest Matrix:



The Power Interest Matrix places each stakeholder into one of the following quadrants:

- **High Power – High Interest.** These are decision-makers and will impact your automation goals the most. It is important to manage this group closely.
- **High Power – Low Interest.** Even though these stakeholders are not interested in the outcome of your automation, they have the power to make or break your project. Thus, it is important to keep this group satisfied
and happy as part of your pitch.
- **Low Power – High Interest.** This tends to include subject matter experts (such as staff responsible for executing the process). This group is very useful when delivering your automation, so they must be kept in the loop.
- **Low Power – Low Interest.** You can monitor this group, but it is important not to spend too much time and energy with them (regardless of how loud their opinions might be).

Use the Power Interest Matrix to identify and categorize each stakeholder and act accordingly (with each group).

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Summary
Pitch your idea

Tailor your presentation

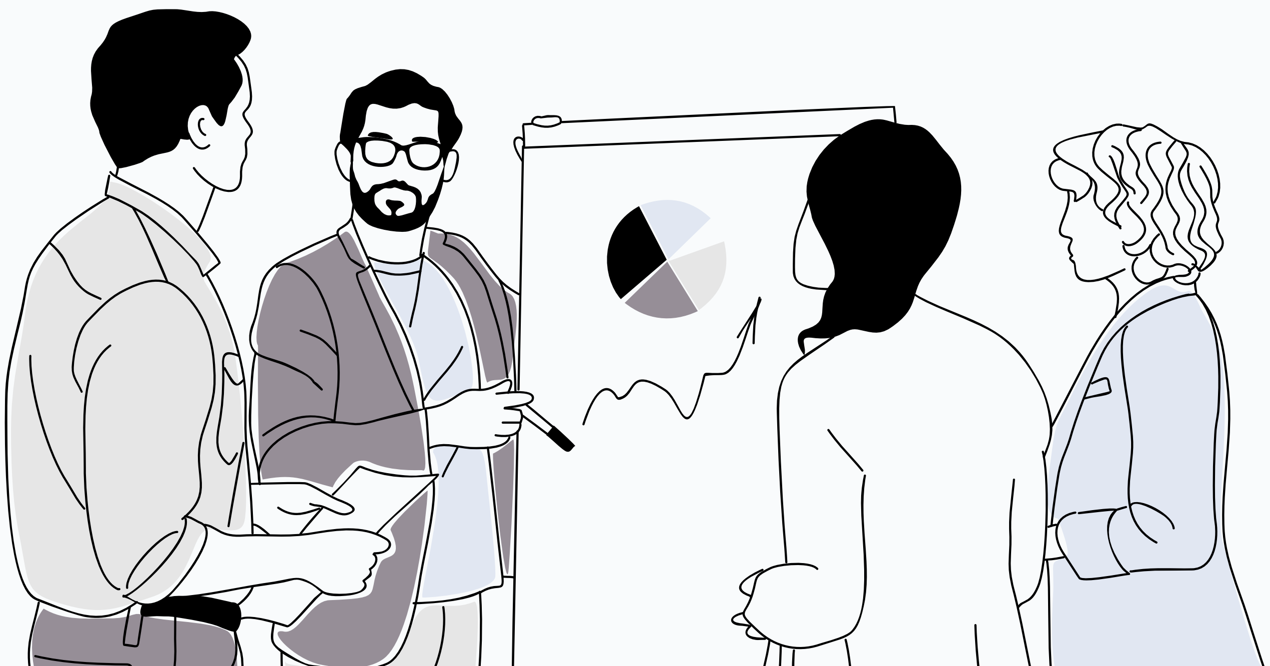
Tailor your presentation to the expertise of your audience. Novices (in the problem domain that the automation targets) are more responsive to abstract ideas or "the why" behind your idea. Experts, however, will require clarity on exactly "how" you plan to achieve your automation.

Identify key decision makers

Identify your key decision-makers based on their power and interest in your automation. Focus your energy and avoid burning out to satisfy all stakeholders.

Present idea as a story

Present your idea as a story, starting with "what is," showing "what could be," and then highlighting how your automation will fill the gap (from what is to what could be).



CONCLUSION

While automation can seem overwhelming and risky, decision-makers and companies are often very supportive of automation. That said, it is important to develop and present your idea for automation in a way that gains the support and backing from your stakeholders.

1. Start by using the product adoption curve to identify decision-makers as enthusiasts, visionaries, pragmatists, conservatives and skeptics. Then tailor your message and approach to automation based on the types you identify.

2. Ensure that you are solving the right problem.

3. When selecting your team, measure the quality of your team through their interest in understanding the problem domain. Pick a tool aligned with your strategy, particularly the business area that will lead automation and the type of automation. Find "Citizen Developers" that can help drive your automation initiative.

4. Validate your idea by building a PoC and engaging stakeholders with something real early into your automation journey.

5. Finally, deliver the perfect pitch for your automation by tailoring it to your audience.

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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

Deploy processes in **minutes**, not months

98% fewer errors

Ready to drive high-impact change in your organization?

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

Book a demo today