keymark™

Three Reasons Your Automations Could Be Failing
And What To Do About It

TABLE OF CONTENTS

What's the Problem

We all know the age-old adage — work smarter, not harder — which is why the concept of automating our most tedious, time-intensive, or expensive processes is a draw, no matter what that work might be. When applied specifically, measured correctly, and supported sufficiently — automation software and hardware can change your work for the better. But there can be a number of pitfalls to your automations that, if left unchecked, cause more harm and headache than what you would deserve from a shiny new investment.

In this eBook, we'll talk about some common problems people encounter with their automations and some strategies/best practices you can implement to ensure effective activations and optimal performance.
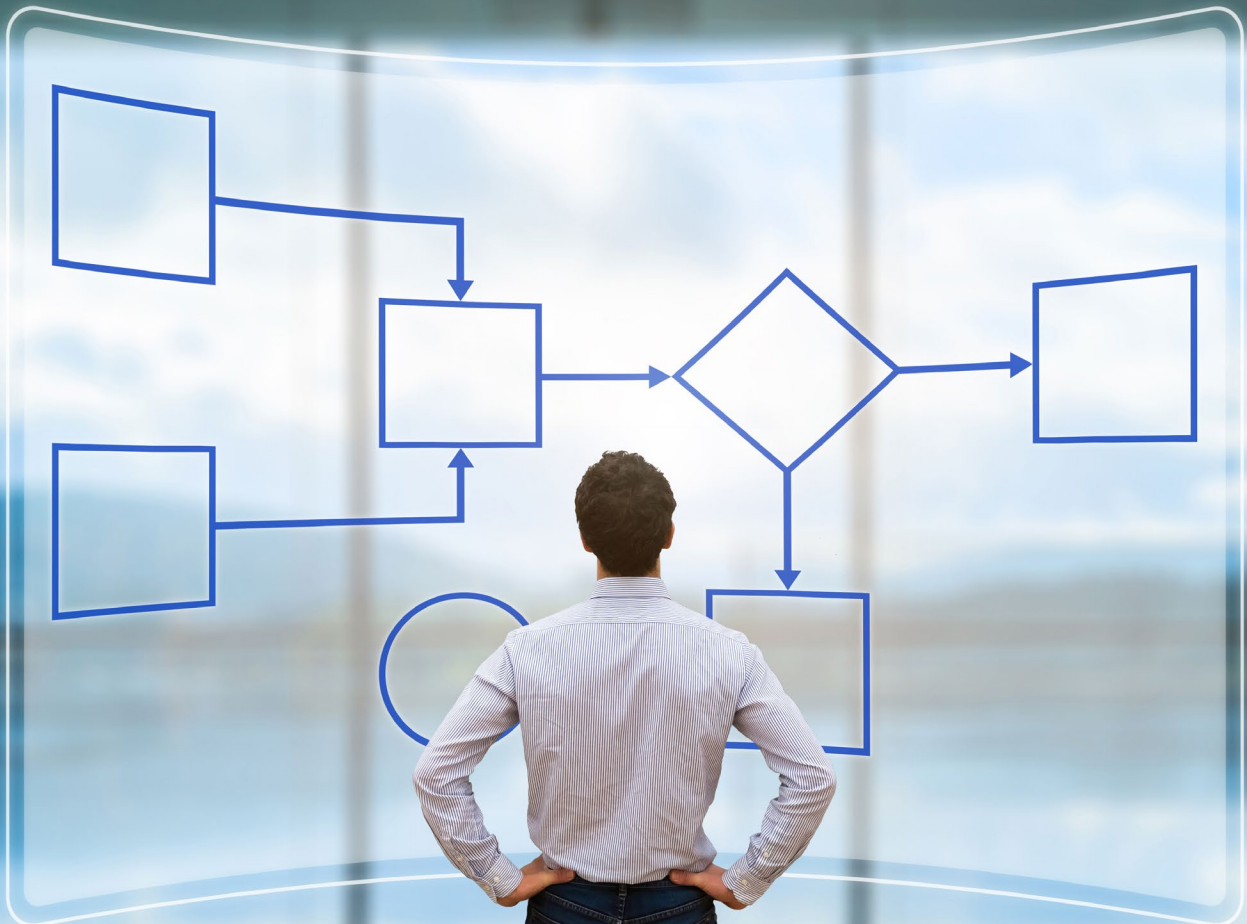
1 Not Knowing What to Automate

We see it a lot. You're using automation, but the human intervention required to keep those automations on track takes more effort than it's worth — OR — You are looking at a laundry list of business processes with no inkling of where to begin. Take a breath — we've got you.

Firstly, business processes are not homogenous. Some require significant decision-making and human input, while others are routine chores critical to your organization but easy enough to perform. You might think that automating your heaviest process is the fastest way to make a return on your automation investment. However, while automation software gets smarter with every iteration – it can't make business-altering decisions for you and will need constant course corrections at decision-making intervals. That's not very autonomous.

Creating your rollout plan to target high-value, low-effort tasks versus your single biggest task is often the better approach.

> **Creating your rollout plan to target high-value, low-effort tasks versus your single *biggest* task is often the better approach.**

As a general rule, automations work best with highly repeatable processes that result in predictable outcomes. These repeatable processes follow simple rules that are effortless for automation software to follow but would otherwise drain significant time from real humans. Removing these tasks, however small, from the workloads of your decision-making employees frees them up for the more significant, more demanding tasks that drive business.

Here are some everyday tasks that benefit from automation:

» Manual data entry between core systems that don't communicate with each other

» Processes that can't scale without hiring more people

» Manual, low-skill tasks that take time away from higher-value outcomes

» Copying and pasting data between documents, spreadsheets, or systems

» Data entry that is prone to human error

» Jobs you would prefer to outsource but need to keep in-house

To help locate and rate even more suitable processes, Process and Task Mining software are powerful tools that can help you quickly uncover areas perfectly fit for automation. Furthermore, a knowledgeable partner can help assess your daily business operations and assist in developing effective strategies while finding the best software for the job. <u>Find out what could be costing you unforeseen expenses with a free or low-cost assessment.</u>

2 Setting It and Forgetting It

A common problem we see is among people who invest significant resources into new software, have a successful implementation, but then don't check to see if their software is consistently meeting key performance indicators (KPIs) or is in healthy operation. While one of the major objectives of automation is to decrease human intervention — you should still expect to dedicate attention to the back-end of your automation software to check and optimize performance and monitor system health. System health checks are essential for three reasons:

» **The software undergoes updates and may change over time.** Like any piece of technology, automation software is constantly changing and receiving updates. These updates increase performance and protect you from system downtime, so you must routinely check and apply these updates as needed. Alternatively, new product releases of similar software could offer you greater capabilities, so doing a little extra homework up-front could generate long-term savings.

» **The software stops working as intended.** We all hate to see it, but software bugs and breakdowns occasionally happen — particularly when software isn't properly maintained. A dedicated resource to monitor your system and perform routine maintenance ensures system shut-downs are minimal.

» **Your needs and goals for business process automation shift.** Your business is evolving, as are its needs. If you've already set up an automation to handle a specific task, has that task evolved as well? If yes, it might be beneficial to try and optimize your automation to reflect these changes.

A knowledgable partner can supply everything you need to keep your automations in check, whether that's performing routine inspections and maintenance, outsourcing a dedicated resource for you, or scanning the marketplace for news on the latest and greatest software to boost your overall performance.

3 Flying Solo

We all want to be the lone wolf, or at the very least, make significant savings by doing everything ourselves. While that might work for your home DIYs, proper setup of your automation software can be labor intensive if you don't know what you're doing and cost you more if done improperly.

Because many aspects of your organization can benefit from a single automation, establishing a Center of Excellence (COE) is an effective way to develop a strategy that yields maximum problem-stopping capabilities. A COE is a team of internal stakeholders, each bringing unique experiences and perspectives to elevate your strategic design. Together, determine your end goals for automation. As stated previously, you can start by looking at smaller processes and then consider how automation can improve business-wide agility, decision-making, and employee efficiency. Then, contact the experts.

We've already touched a bit on the benefits of a knowledgeable partner, but where that partnership really shines is in the implementation, employee training, and extended support that comes along with it. KeyMark has been doing automations in nearly every vertical for the past 25 years. As a result, we know your business and can help you source and support the best hardware and software that achieves your goals. We'll help you effectively set up your new investment and then hand you the keys. Beyond that, our award-winning support team will be right there with you through every step of your automation journey.

It all starts with a conversation 💬

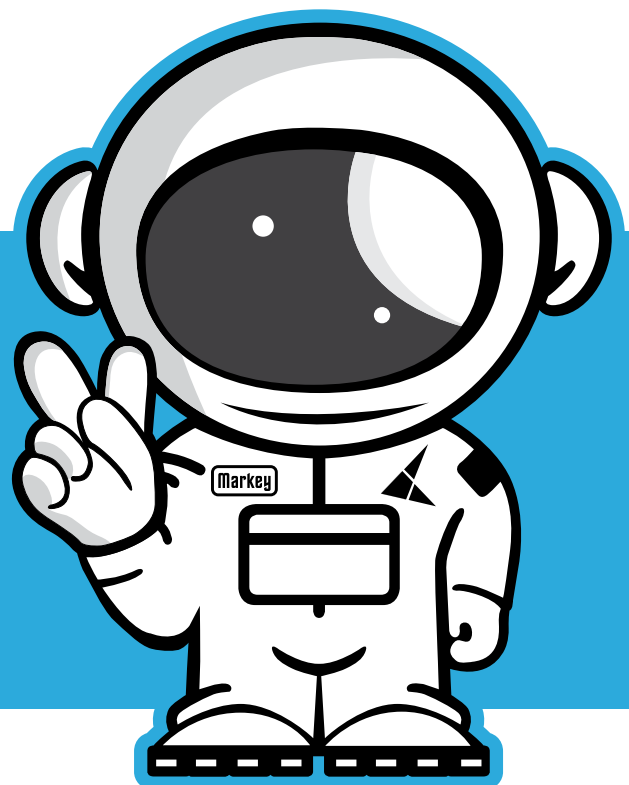Here's what you can expect when working with KeyMark

Conclusion

There's no doubt about it that automation, when done right, can enhance efficiency and improve your bottom line. But unfortunately, Automation users too often leave savings on the table by directing their solutions at the wrong processes or failing to measure if their automations align with their goals.

For those looking to begin an automation journey, we hope this guide proves useful in highlighting some of the important considerations when planning your investment — or for current automation users — how you can better optimize your existing configurations to unlock further utility. No matter who you are or what stage you're in, you're not alone. A world of valuable resources and committed partners are here to help you along your way.
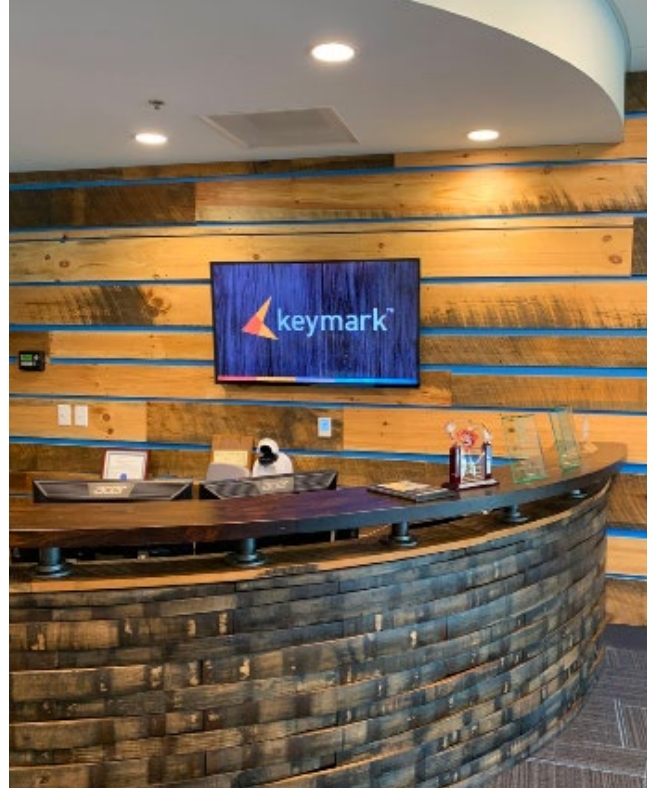
Now that you're equipped with even more knowledge — **Automate and Prosper!**

About KeyMark

KeyMark is a leading provider of intelligent automation solutions focused on enabling better business outcomes through capture (OCR), workflow (ECM), case management (DCM) and robotic process automation (RPA) solutions. KeyMark helps clients leverage technology, such as artificial intelligence and machine learning, to maximize productivity and decrease manual labor in industries such as financial services, healthcare, insurance, manufacturing, distribution, utilities, logistics, and the public sector.

Together, KeyMark, Blue Prism, UiPath, OnBase by Hyland, and Kofax help organizations scale effectively and achieve operational agility by deploying a digital workforce that maximizes productivity and minimizes manual work. As a value-added reseller of today's leading intelligent automation solutions, KeyMark is one of a select few organizations worldwide to represent such a comprehensive list of automation capabilities with years of proven experience and award-winning Extended Support. Additionally, KeyMark is the creator of Forms InMotion, an innovative software-as-a-service solution for forms automation.

For more information, check out our website at keymarkinc.com, or get in touch if you're ready to start your automation project!