3 Things to Consider When Automating Your Workflows

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Just a few years ago, automation was looked upon as something mystical. Would it make half the workforce redundant, lead to mass unemployment and universal basic income? People wrote books about robot takeovers, and the media wrote articles with titles like “Will AI Replace [insert job function]?”

Today, it seems like we have a more pragmatic view of automation. We no longer seem to be afraid of mass unemployment. On the contrary, labor shortage and Great Resignation waves are on everybody’s lips. This gives automation an entirely new dimension as a technology that helps modern businesses stay afloat in a difficult talent economy. In addition to that, we seem to have realized that automation is not here to replace us. It’s here to augment us, make us better at our jobs and help us get rid of tedious and mundane manual work. So, we get more time to be creative and strategic or even go home early to spend more time with our families.

As a CEO of a SaaS business that provides automation, I’ve experienced this development. The market is more mature, the customers have more realistic expectations, and it also seems like the automation providers have a better understanding of what they need to offer. At least, we do.

Nevertheless, some companies still have trouble navigating the automation market and understanding where to start or how to proceed with automating workflows. So, here comes my take on what you need to consider when automating your workflows.

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Begin with high frequency/low complexity tasks

Not every part of a workflow can or should be automated. You should focus on the tasks you often do. It makes little sense to introduce scalability where there is no scale, so automating high frequency has the highest impact. And you should focus on relatively simple tasks. Things like data entry, data extraction, moving files between systems, generating stuff from templates, etc. Creative work and social interactions are still too complicated for machines, so there is no reason to focus on this right now. Get rid of the simple tasks first.

Let's take a sales process as an example. One half of the sales process is creating a human connection and building trust. The other half is updating a CRM, generating proposals and contracts and notifying stakeholders – simple manual tasks like that. Focus on the latter. Let humans focus on the job's social, creative and strategic aspects, and let machines take care of all the mundane busywork.

Focus on the value – not the technology

AI is overrated …That got your attention, right? Well, AI has a lot of use cases and might very well have a great future, but you shouldn't fixate on the technology when automating workflows. Focus on the value: Does the solution make you more efficient? Does it lead to more consistent results with fewer errors? Will it give you more time to pursue other tasks?

In most cases, you don't need over-complicated AI solutions to

do that for you. You can use simple automation systems based on deterministic logic to get rid of all your busywork. It might not be as appealing, and you might not be able to write a fancy press release about it, but it does the job. The fact is, most companies aren't even ready for AI yet, so let's get back to basics. Begin with the low-hanging fruits, and solve some problems with existing, proven technologies.

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Sort out your data

One of the more overlooked aspects of automation is data. Your AI is feeding on data. Most deterministic logic-based automation tools use data. What prevents most companies from creating smooth automated workflows is that they haven't structured and harnessed their data.

So, before you can get to the point of hyperautomation, where everything runs smoothly, and you are free to focus on what matters, you need to sort out your data. Use structured and data-rich formats, choose applications that integrate well, and focus on streamlining your dataflows, so that everything speaks together across the entire organization.

Automation is key to getting through the current labor shortage challenges. It's an advantage that will give your business a competitive edge by making you more efficient. And getting rid of tedious manual work is crucial to ensuring happy employees in a modern workplace. This is how you get started!

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