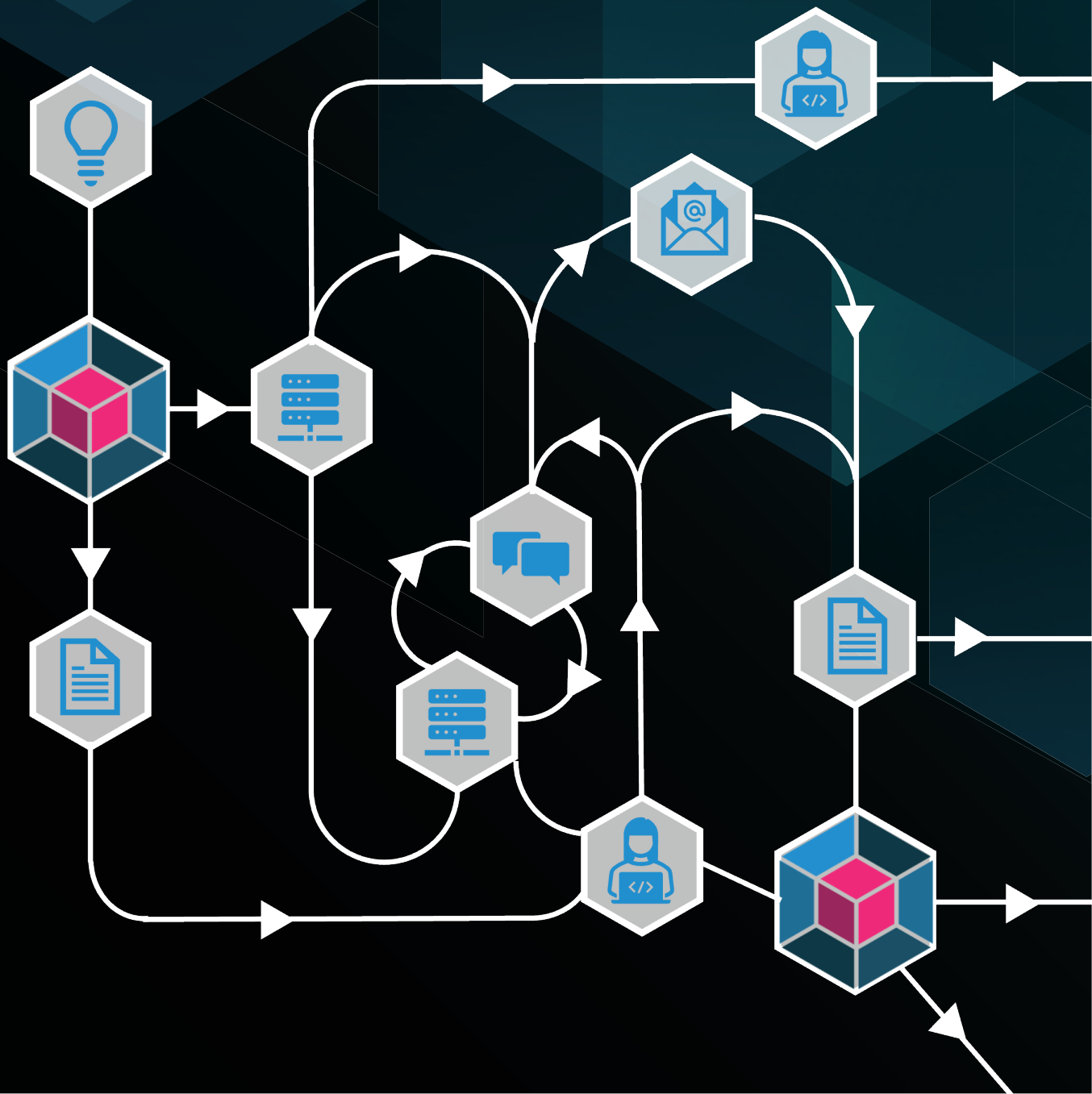# A guide to workflow & process automation.

WHITEPAPER

Modern legal and compliance work requires management and oversight of a wide range of processes, from simple, repetitive, routine tasks to large and complex end to end procedures. Doing so in the most efficient way is an iterative journey for most organisations.

Selecting the right technology alongside the right resourcing is paramount in delivering successful outcomes. This guide aims to arm you with the right knowledge to make the right choices for your organisation.

Automation is everywhere. Transforming the way we accomplish everyday tasks in both our personal lives and in the corporate world. We have powerful technology available to us, that if used wisely enables so much potential but often adoption is challenging because of the nature of the change.

The advancement of technology in recent years now enables workflow automation at scale. In the corporate world, where reducing risk, improving productivity and increasing profitability is vital, the automation of repetitive tasks, streamlining processes, and improved efficiencies are priorities for management and ultimately the shareholders or business owners.

The terms workflow and process automation are often used interchangeably, which often creates problems. Progressing from simple repetitive routine tasks to orchestrating end to end complex intricate procedures can be hard to get right and is definitely an iterative journey for most organisations. The need to select the right technology alongside the right resourcing is paramount in delivering successful outcomes.

Both workflow and process automation are the silent forces revolutionising the way we handle tasks, from everyday activities to complex professional workflows where understanding the business logic is essential.

What is workflow automation?

At its core, workflow automation involves breaking down complex processes into smaller, more manageable tasks, often identifying manual tasks within a workflow and implementing software, tools, or systems to automatically execute those tasks.

A key aim of workflow automation is optimising efficiency and minimising manual effort. By automating routine tasks such as data entry, file processing, or approval workflows, organisations can free up valuable time and resources that can be redirected towards more strategic initiatives or higher-value activities.

In recent years with the advancement of technology, automation has started to revolutionise the corporate landscape. Contract renewals, for instance, can be effortlessly managed through automated workflows, sending timely reminders and incorporating escalations to ensure critical deadlines are never missed. Dynamic triggers, such as changes in interest rates, can prompt automatic adjustments to contract terms and the underlying structured data.

What is process automation?

In its simplest form, where workflow automation can be considered tactical, process automation is strategic. It is designed to improve organisational efficiency and effectiveness by leveraging technology to automate and optimise the execution of complex business processes. At its core, process automation aims to streamline the flow of work, reduce manual intervention, and standardise procedures to achieve consistent, repeatable results.

This approach begins with a comprehensive analysis of existing business processes to identify areas that are prone to inefficiencies, errors, or delays. This analysis involves examining the sequence of tasks, the interactions between different stakeholders or systems, and the underlying business logic and decision points that govern how work is performed. By mapping out these processes, organisations can gain insights into where automation can have the greatest impact and identify opportunities for optimisation.

In summary, process automation is a holistic approach to improving organisational performance by automating and optimising business processes. By leveraging technology to streamline workflows, standardise procedures, and eliminate manual effort, organisations can achieve greater efficiency, agility, and competitiveness in today's dynamic business environment.
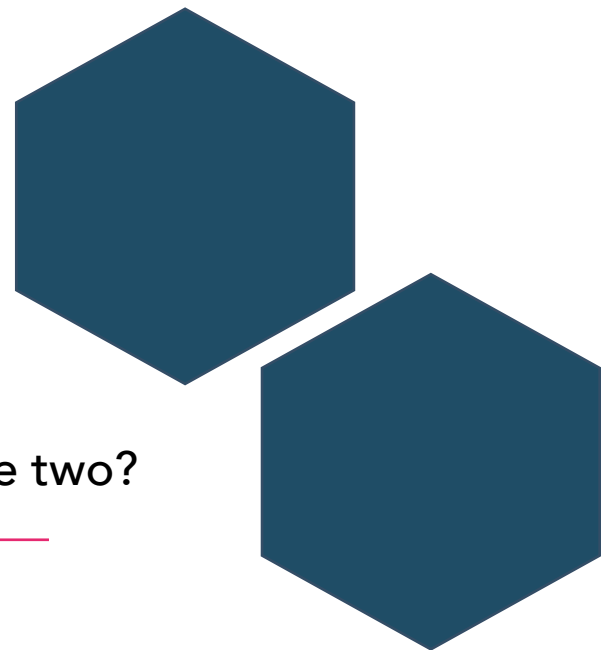
What are the key differences between the two?

Workflow automation and process automation are closely related concepts, but they are not the same. While they both involve leveraging technology to automate tasks and streamline operations, there are some differences between the two.

Workflow automation typically refers to the automation of specific sequences of tasks or activities within a larger business process. It focuses on the flow of work from one step to the next, often involving multiple stakeholders or departments. Workflows are typically visualised as diagrams or flowcharts, outlining the sequence of tasks, decision points, and dependencies involved in completing a particular process.

Process automation, on the other hand, has a broader scope and encompasses the automation of entire business processes or workflows from end to end. It involves analysing and optimising the entire process, including all the individual tasks, handoffs, and interactions between different systems or stakeholders. Process automation may involve reengineering existing processes to eliminate inefficiencies, standardise procedures, and improve overall performance.

In summary, workflow automation focuses on automating specific sequences of tasks within a larger process, while process automation involves automating the entire end-to-end process, from start to finish. Both approaches aim to improve efficiency, reduce errors, and enhance productivity, but they differ in terms of scope and complexity.

Automation projects of all sizes start with good (understanding of your) data.

It is hard to consider an automation project without considering the role of data. Good data is a fundamental prerequisite for successful automation projects. It underpins decision-making, process mapping, quality assurance, optimisation, compliance, resource allocation, integration, and user satisfaction, ultimately contributing to the overall success and effectiveness of automation initiatives.

Projects often involve making decisions based on data. Whether it's determining the next step in a workflow, setting rules for automated actions, or analysing performance metrics, having accurate and reliable data is crucial for making informed decisions. As such, projects should not be set in stone; they need to adapt to changing circumstances and continuously improve. Analysing data generated by automated processes allows organisations to identify areas for optimisation, fine-tune automation rules, and enhance overall efficiency.

Automation projects require resources, including time, budget, and personnel. Good data enables organisations to prioritise automation efforts based on the potential return on investment, resource availability, and strategic objectives. In many industries, compliance with regulations and adherence to governance standards are critical. Good data ensures that automated processes comply with legal requirements, industry standards, and internal policies, reducing the risk of non-compliance and associated penalties.

Automated processes often rely on data from various sources and systems. Good data quality facilitates seamless integration between different systems, ensuring that data flows smoothly across the entire automation ecosystem.

Where to start and what to automate. Hint… It's a journey.

The journey from foundational to advanced automation is an iterative and multi-year endeavour and there is no one-size fits all advice. However with the foundation of automation laid, the next step is to understand where its application can yield the most significant benefits. Here's a guide on where to start at each level:

Foundation

A basic workflow automation project involves automating simple, repetitive tasks or processes using straightforward, rule-based automation techniques. These projects typically focus on streamlining single-step or linear workflows with minimal complexity. Basic automation projects often require minimal customisation or integration with existing systems and can be implemented relatively quickly and with minimal resources.

Initiate your automation journey by streamlining email-based workflows, eliminating repetitive tasks, and gaining visibility into team activities. Address straightforward processes, such as managing standard contracts, to provide immediate value.

Enhanced

An intermediate workflow automation project involves automating moderately complex processes that may involve multiple steps, decision points, or dependencies. These projects often require more advanced automation techniques, such as conditional logic, data transformations, or integration with multiple systems or applications. Intermediate automation projects may also involve collaboration between different departments or stakeholders within the organisation or third parties.

Advanced

An advanced workflow automation project involves automating highly complex processes that may span multiple departments, systems, or business units. These projects often require sophisticated automation solutions, such as machine learning algorithms, natural language processing, or advanced analytics. Advanced automation projects typically involve transforming and optimising entire end-to-end business processes, driving significant improvements in efficiency, agility, and innovation.

What are the 12 steps to successful automation?

When considering automation projects, it's essential to start with a systematic approach to ensure success. Here's a step-by-step guide to help you get started.

1. Identify processes

Begin by identifying the specific processes within your organisation that are prime candidates for automation. Look for tasks or workflows that are repetitive, manual, time-consuming, error-prone, or have a significant impact on productivity and efficiency.

2. Understand your data

Within your processes establish the baseline of data that is either used to initiate a workflow, be captured as part of a task or leveraged as part of an output. Understand the relational data model and how the different data tables relate to each other and also may be used in combination to deliver the right outcomes.

3. Analyse current workflows

Once you've identified potential processes for automation, conduct a detailed analysis of the current workflows. Document each step in the process, including the tasks involved, the sequence of activities, the stakeholders or departments involved, and any dependencies or decision points.

4. Understand your integration requirements

Once you have assessed the process, the data and current as-is workflow, you will need to then consider the systems that your processes interact with. Understand the integration limitations and expectations for each in order to deliver the right outcomes.

5. Assess feasibility and ROI

Evaluate the feasibility of automating each identified process by considering factors such as the availability of technology solutions, the complexity of the workflow, the potential benefits of automation, and the estimated return on investment (ROI). Prioritise automation projects based on their potential impact and alignment with strategic objectives.

6. Define objectives and goals

Clearly define the objectives and goals of each automation project. Determine what you hope to achieve by automating the process, whether it's reducing costs, improving efficiency, enhancing accuracy, accelerating turnaround times, or enhancing the customer experience.

7. Engage stakeholders

Collaboration and buy-in from stakeholders across the organisation are crucial for the success of automation projects. Involve key stakeholders, including process owners, department heads, IT personnel, and end-users, in the planning and decision-making process to ensure that automation solutions meet their needs and requirements.

8. Select automation tools and technologies

Identify and select the appropriate tools and technologies to support your automation initiatives. Depending on the nature of the processes being automated, you may need to consider robotic process automation (RPA) tools, workflow automation platforms, business process management (BPM) software, artificial intelligence (AI) solutions, or custom development.

9. Design automation workflows

Design automation workflows that outline the sequence of tasks, decision points, and dependencies involved in the automated process. Define the rules, triggers, and conditions for automation, as well as any exceptions or error-handling mechanisms.

10. Develop and test

Develop the automation solutions based on the designed workflows and test them thoroughly to ensure that they function correctly and produce the desired results. Conduct unit testing, integration testing, and user acceptance testing to validate the effectiveness and reliability of the automation solutions.

11. Deploy and monitor

Deploy the automation solutions into production and monitor their performance and impact over time. Track key performance indicators (KPIs) to measure the success of the automation projects and identify opportunities for optimisation and improvement.

12. Iterate and improve

Continuously iterate and improve automation workflows based on feedback, performance metrics, and changing business requirements. Regularly review and update automation solutions to ensure that they remain aligned with organisational goals and objectives.

10 tell-tale signs your organisation is ripe for some automation

1 Your team is focused on low value high volume tasks that don't require much decision-making or expertise.

2 Your organisation's workflows involve multiple steps, decision points, and dependencies, making them difficult to manage manually.

3 Your business processes involve multiple tasks that need to be coordinated and executed in a specific sequence.

4 Your organisation's data evolves or is updated regularly, requiring frequent adjustments to processes or workflows.

5 Your organisation relies on manual processes and documents, such as Word checklists and spreadsheets, to manage work tasks and information.

6 Your team rely on manual allocation and management of your tasks and tracking progress status.

7 Your organisation needs to enable collaboration between different teams, departments, or external partners to complete tasks or projects.

8 Your organisation's data is scattered across multiple systems or databases that don't communicate effectively with each other which require manual updates.

9 Your organisation operates in an industry with strict regulatory requirements and compliance standards meaning auditability is key to your activity.

10 Your organisation regularly creates, reviews, and delivers documents as part of its day-to-day operations with governance requirements regarding security and storage.

This white paper reiterates the transformative potential of workflow and process automation in enhancing organisational efficiency and driving competitive advantage. By leveraging automation technologies and embracing a data-driven approach, organisations can embark on a journey towards streamlined processes and sustainable growth.
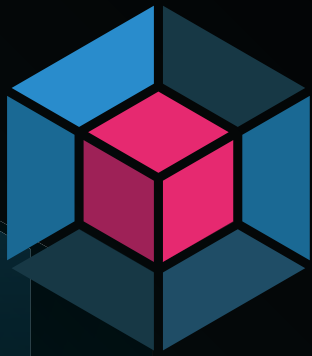
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ABOUT AUTOLOGYX

Autologyx is a data centric platform that combines scalable process automation and workflow management with collaboration tools, harnessing the power of your data, to improve efficiency and elevate your firm's success.