Point of View

How to Make Automation Program Successful

"Automation of processes, activities, and technology."

Automation is the foundation for success in the digital age. Automation is pervasive in IT organizations across industries, as companies strive to become more agile by reducing response times. In the digital era, automation not only provides cost savings, but it can be a differentiator for the business to stand out from its competition and increase customer satisfaction. Automation promises to address many challenges, increasing efficiency and creating a 24/7 virtual workforce. To realize these results, organizations must create an intelligent automation strategy that aligns to the goals and vision of organizations.

Proper due diligence is of paramount importance when embarking upon an automation program. It must be based on clear business outcomes, and assessed based on its long-term potential for investment returns. Through automation, it is critical to engage employees in these processes to increase efficiency. We need to establish a solid foundation for IT Automation adoption and consider some critical Success factors of Automation Program. It is necessary to lay the groundwork by optimizing manual processes before committing to automation.

Here are some of the important factors need to be considered to make automation process successful:

1. Understand the problem you're trying to solve

As you review a proposed Automation application, make sure you understand what the real problem is that the business is trying to solve. What do you expect from automation? Is it greater efficiency? and hence, increased productivity, or is this a means to move your teams to higher-end activities? Is there a direct cost savings benefit? If yes, then are you weighing the return on investment and time to break even?

Automation changes some of the key assumptions around processes. Simply replicating what is manually being done today doesn't take full advantage of an automation's capabilities.

Before automating, consider the following:

- ☑ What problems are we trying to solve using automation?
- ☑ Are there sufficiently skilled resources available to work on automation?
- ☑ What is the cost v/s value of the proposed automation effort?
- ☑ How testable is the application?
- ☑ What are our goals for automation?
- ☑ How do we make automation more visible to the entire team?
- ☑ What types of tools are needed for automation?
- ☑ What are the pros and cons of going with open source v/s vendor tools?
- ☑ What process should be followed for automation tasks?
- ☑ Is there enough support from stakeholders to implement automation successfully?

2. Target the low-hanging fruit first

Resist the urge to move in bullet time; start slow and keep everyone's expectations in check. Everyone is in a hurry to adopt automation, but you'll be smart to first identify the standard, stable, and most repeatable processes as your first candidates, and leave the complex ones for later.

The alternative is to get stuck with complicated projects, fail, and have the business complain that automation does not work. Initial adoption, even if slow, will build up confidence with and trust in automation technology.

3. Conduct a feasibility analysis

Technology is a given, but only when there is a history of success and stability. Any technology or platform going through the early phases of adoption and maturity needs to be mapped to business needs so that it is fit-to-purpose. To ensure success, subject your candidate project to a feasibility analysis—both from a technical and business perspective—right up front. If your organization doesn't engage with IT early and go through this process, it may end up with a candidate project that's being force-fitted into a program, and it won't realize the expected benefits.

4. Follow the SITO rule

An automation initiative can be a golden opportunity for everyone to step back and look at the process for refinement by putting it through the **SITO** steps: **Simplify, Improve, Transform,** and **Optimize**. If you can simplify a process, you will have less complexity to maintain later. And if you can improve on the existing one, all the better. Perhaps you can transform it to include digital elements, maybe better customer experience, better quality, and more efficiency. Take this as an opportunity to optimize processes, because with an optimized process you can drive more outcomes. Do this before you feed the candidate project into your automation engine.

Create a central repository that can be accessed by the entire team, where all the details of the automation efforts are documented. This information may include the modules being automated each sprint, the people working on each, and other relevant details about the individual tasks.

5. Governance

Use of visual assistants such as dashboards are accessible to the entire team to highlight the different processes to follow, and to meet automation deadlines. Checklists for everyone to follow may also be useful to the team. Consistently update the team about the automation progress in daily standups, team meetings, retrospective meetings, planning meetings, and any other meetings, where the complete team discusses different aspects of the project. Coordinating between systems to ensure automation doesn't unexpectedly impact other technical operations.

6. There is no 'one size fits all'

Automation tools are still evolving, and a tool that fits for one business use may not be suitable for another—so plan accordingly. Persistence is key.

Here are the following factors that contribute to automation process, failing which needs to be considered before defining the process:

Misaligned or wrong end goal

Most often, the end goal of automation is to eliminate or replace humans. This often leads the team to focus on very specific tasks that jeopardies the business in the process of implementation. While it is possible for some quick automation of "low hanging fruit", the real automation is the one that drives around transforming the appropriate business improvement and thus intends to serve its customers better. In most cases, the automation should be centered around the business transformation for the good - like delivering better value for the customers. Also, just automating for the sake of automating without any real benefit to the business or end users, often gets washed away in this process.

Not focusing on the whole picture

First rule of automation should be understanding the whole picture of the current scenario. Knowing what to do first and how to plan and execute it, would make it easier for every stakeholder involved to be on the same page and could drive this as one coherent goal. If the outcome is not easily understood and not enough validations have been done before starting the project, it will often lead to various stakeholders operating at different directions and speed. The fact is IT process automation is meant to streamline operations, not tools and make the lives of your team members - better, not worse. Focusing on the big picture, implementing and executing consistent automation with a unified goal in mind, will fetch the results.

Not setting appropriate expectations

Sometimes an IT process automation project is deemed a "failure", simply because it did not meet expectations of certain stakeholders. That's why it's so important that those in charge of planning, testing and implementing any ITPA project include communication of the expected timeframe, as well as the potential for issues and delays that may inevitably arise. When "the powers-that-be" know what to expect ahead of time, there are no surprises to have to deal with during the process.

Failing to adequately calculate and communicate ROI

For an ITPA project to be carried out successfully, the projected benefits and long-term gains must be determined and demonstrated upfront. This includes considering the early costs associated with adopting an automation tool and helping decision makers understand the timeframe for seeing positive returns. Without this, you risk upper management pulling the plug too early due to lack of results.

Not using the appropriate tools and techniques

Just like most things in IT, not every automation tool or techniques are created equal. Some organizations fall into the trap of purchasing the wrong tool or employing wrong technique due to either budget issues or skill set gap, they will realize the negative impact on the project and at the end, either it might cost them more time and money, or completely abandon the initiative. Others make the mistake of investing in a product that they think is top-of-the-line, only to discover that it has way more features than they really need, making it a waste of money. The key to successfully carrying out an IT process automation project is to do your research and select a tool is both affordable and scalable to fit your specific needs.

Conclusion

The key success involves changes to be accepted across people, process and tools involved. Culture change must be driven from top to bottom, therefore the right team with an aligned mindset can deliver results. This sense of mission is required to be communicated clearly and regularly by the leaders. Providing transparency around the program to decrease fear that automation is going to replace jobs is the need of the time. However, automation doesn't necessarily mean job loss. Rather, it creates additional capacity for workers, giving them time to shift to higher-value work and the new initiatives being created by advancing technologies. Still, employees need to understand retooled workflows and adjust to their roles in automated processes, and they need to understand how their overall jobs are influenced and affected by automation.

For an automation program to be successful, an organization must understand all the steps in an existing process, identify which steps are necessary, where bottlenecks exist, and whether the process can adjust to new requirements as they evolve.

Pursue user feedback and unceasingly explore opportunities to refine existing automation processes and to implement new ones.

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