

**BOTS &
PEOPLE**

Recognize Automation Potentials



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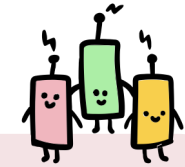
Intro

Hello,

This guide will help you to identify and assess automation potentials.

Not every process that is repetitive and manual is suitable for automation using technologies such as RPA and others.

Therefore, we provide you with a guide that will help you separate the wheat from the chaff and start working on the right projects.

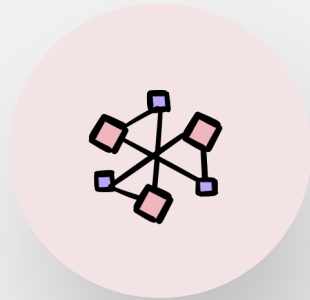


Why this guide?

- ✓ Create a consistent approach to analyzing automation potential.
- ✓ Filter out the projects that offer you and your company the greatest added value.



Procedure for the analysis of automation potentials



1

Can the process be automated in principle?



2

Deep process description



3

Continuous evaluation of automation projects

Can the process be automated in principle?



To begin with, you should ask yourself whether your process is suitable for automation at all. There are a number of questions you should ask yourself or your colleagues from the department:

How rule-based is the process? If a process is rule-based, the steps can be replicated using technologies such as RPA or cloud automation. For complex decisions, the use of AI is required.

Does the process always run in the same way? If a process runs in different steps, many exceptions must be taken into account when developing an automation solution. This makes the automation project significantly more complex.

How digitized is the process? A process that is carried out in sub-steps on paper must first be digitized before the data is passed on to the next process step in a structured manner.

How structured is your input data? Unstructured data is, for example, e-mails that are worded differently. Structured data is, for example, defined input fields in an online form. With structured data, automation is easier to execute.

Do you expect changes in the system landscape? If your system landscape changes frequently or a major change is imminent, the automation - regardless of the technology - must also be adapted.

Is test data available? With test data, an automation project can be carried out with less risk. During automation, large amounts of data are often transferred in a short time.

Is there process documentation? A well-documented process is much easier for the automation developer to familiarize himself with.

Deep description

Now you know whether the process has automation potential. If the process is suitable for automation, you can now perform a more in-depth analysis with the following elements.

General about the process

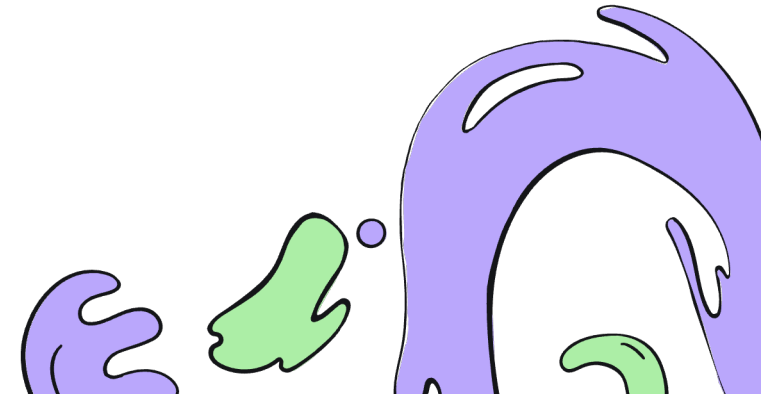
- Who benefits from the process?
- Who is currently carrying out the process?
- Who are other relevant stakeholders?
- How do the groups involved benefit from the execution of the process?
- How does the process proceed in the individual steps? (Note: Have the most common case explained here first. However, keep in mind that there may be some exceptions.)
- What software is involved?



To the calculation of the business case

- What value should automation bring you (save costs, increase employee satisfaction, reduce compliance risk, reduce error rates, increase revenue)?
- How often is the process executed?
- How long does it currently take to run the process once?
- What revenue does the execution of the process potentially generate (optional)?

Important: In the further course, the processes can be further defined on a data basis with the help of process mining or task mining. However, this only makes sense for very high-volume processes.



Continuous evaluation of the automation projects



Keep a constant eye on your demand funnel for automations. Professional prioritization of individual projects, when they are implemented and how much effort you put into them are essential. This is the only way to successfully leverage automation potential in your organization.

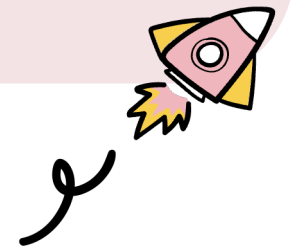
Procedure

- Look at automation successes after each project; even over the first few months.
- Learn from mistakes and projects that didn't go well.
- Keep an eye on the effort required to make changes after the launch of automation.
- Keep an eye out for continuous improvement (e.g., by giving the process owner goals for successful execution of the process).



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- ✓ Overview of the return on investment for all automation projects.
- ✓ Use technologies and automation that can be "recycled" for different projects.
- ✓ Deploy resources on the projects that generate the most added value.

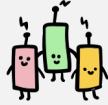


Recognize Automation Potentials

Thanks for reading



Automation is teamwork!



In order to successfully identify automation potential, departments and centers of excellence must pull together for successful automation.

Therefore, a uniform approach to the analysis of automation potentials is an essential component for the successful and comprehensive implementation of automation in the company.



Oliver Nagel - COO, Bots and People

Oliver's passions lie in the areas of finance and technology. Currently, his focus is on the strategic and operational development of Bots and People. Bots and People is a training academy specializing in automation that also provides its learners with software to manage automation more efficiently in the enterprise.

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