

A STEP-BY-STEP GUIDE

# How to Automate Business Processes

Cloud*tal*



## STEP 1

# Identify one process and its owner to test

While it is tempting to try to automate your most challenging process, choose a process that is easier and is low risk to automate.

## PROCESS OWNER

The process owner is usually the business lead in charge of the process. This person is accountable for the smooth functioning and organisation of the process and data.

Talk through the current process and what they might be looking for from automation.



**Cloudtal**

## STEP 2

# Set your benchmarks

Cloudtal

Keep the 'Why' of automating your process in mind before you trigger any workflow.

Identify the most important priority in a workflow and don't attempt to achieve multiple goals all at once. Tie a workflow to a specific objective that you are planning to accomplish and within the timeframe you want them achieved.

Be clear about the optimal time taken to complete the task under normal conditions, and use the information to set reasonable goals for your automated process to achieve.



### STEP 3

## Draw out your workflow

It is important to draw what the workflow will look like. Get the process owner to describe the ideal way the process should run.

Find out how the tasks were managed in the past. Understand the history of a process and any big changes they have gone through, instead of basing decisions on assumptions.

At this stage the process owner will identify any redundant tasks or start to see what is possible with automation.

E.g. A task that was once **'Collect order details and email accounts to raise invoice'** can be completely eliminated by a simple automated step.



## STEP 4

# Involve all stakeholders and train users

Typically this involves the process owner who understands how the process should run, and the technical admin who knows how to use the technology.

- Involve stakeholders from the start
- Find out what data they need
- Get feedback from end users to understand pain points

## YOUR USERS

The success of your business process automation depends on how users in the process interact with the system. The best way to achieve this objective is by training your users.



**Cloudtal**

## STEP 2

# Run a pilot test, measure and optimise your process

Cloud*tal*

The best way to understand the impact of the automation without interfering with ongoing processes is to run a pilot test.

### MEASURE AND OPTIMISE

Set KPI's to measure if your automation is having a desired impact.

The process owner is responsible for measuring and optimising the process.





## THANK YOU FOR DOWNLOADING OUR HOW TO GUIDE

We hope you found this resource useful as you look for ways to grow your business using Salesforce. As a growing business ourselves, we understand the demands, pressures and excitement of running your business. We also know that adopting new technology can be difficult, time consuming and overwhelming.

Like any venture, implementing Salesforce can be difficult at first. But we believe technology can give growing businesses a competitive advantage over their competition.

If you have any questions please feel free to call us or drop us an email.

**0330 124 1292 | [help@cloudtal.com](mailto:help@cloudtal.com)**