

The simple steps you can take to Workplace Automation



Why automate?

There's a need for organisations of all sizes to start automating data and processes so they can respond better and faster to customers, reducing departmental log jams, duplication of work and unnecessary costs. With a lack of automation in place, costs rise, efforts multiply and employees face an impact on performance, by spending more time on tedious administrative tasks, as opposed to focussing their efforts on higher-value projects that provide a real return on investment.

The rising focus on data and process automation is unsurprising, as it gives employees the power to automate basic administration, boost productivity and improve quality of service, allowing your organisation to be streamlined and work more effectively, both internally and externally.

Whilst automation can often be seen as a complex or cost intensive solution, some organisations may be unaware that they already have access to the necessary tools to take the first step in their automation journey.

66% of businesses have piloted the automation of business processes in one or more business functions

Source: Imaginovation



What can you automate?

There are no boundaries when it comes to applying workplace automation and you can automate as little or as much as you require. It's often best to start by undertaking an audit of your current processes to better determine where repetition lies, which can ultimately be avoided – for example, do you have a manual process whereby you are taking information and placing it into a spreadsheet for a salesperson to follow up. Something as simple as this can be a resource heavy task, which could easily be automated.

Additionally, you can create a workflow that automates taking information from emails, stores it in a central document and then sends trigger notification emails to different departments based on the information provided.

Let's take a closer look at how automation can be implemented on a personal, departmental and organisational level to save resource and streamline processes:

67% of companies use business process automation solutions that improve end-to-end visibility across different systems

Source: Imaginovation

Personal:

- Combining several disparate spreadsheets into one central document
- Analysing data from several emails, building a report, and sending this to colleagues
- Automatically updating spreadsheets with customer feedback

Departmental:

- Emailing clients with progress of their order when milestones are met
- Automatically create and send quotes to clients
- Improve customer responsiveness with marketing automation workflows

Organisational

- Build a companywide annual leave system to eradicate manual leave booking processes
- Stay compliant with ISO9001 standards by implementing a learning management system that reminds people when training is overdue
- Generate timesheets from calendar entries and automatically send to line managers for approval

How do you automate?

The need to automate workplace processes is clear, but how and where do you start? It can often seem like a daunting task, so we've broken down the initial steps you should take to start your automation journey:

1. Identify what needs automating: in the previous section we've illustrated what can be automated and discussed highlighting those every day repetitive data tasks

2. Map out the current process: understand the current workflow; where does information come from, where does it go, who is involved and what is the final outcome

3. Map out the new process using the tools of automation: this is where some knowledge of automation tools is required, as it allows you to understand the available workings of your chosen tools to map out and build new workflows and processes to be automated

4. Launch the process: switch on your automation and start saving on resource and costs

5. Refine the process: using internal and external feedback, you can further refine the new process until it delivers the best and most streamlined workplace automation for your organisation



Automation tools at your fingertips

A lot of organisations already have the necessary toolkit needed to leverage workplace automation - they just don't know it. If you are already a user of Microsoft Office's 365 package, you have the ability to start implementing automated processes in your organisation today.

If you're not a user, now is the time to consider upgrading as not only do you get market leading office tools, such as Excel, Word, PowerPoint and Outlook, but you also get a host of additional tools that can help your business achieve its goals.

The operational benefits within Microsoft's tools



Power Apps

Connect your data sources

Microsoft Power Apps is a service for building and using custom business apps that connect your data and work across web and mobile – but without the time and expense of custom software development.



Power Automate

Automate tasks

Microsoft Power Automate, formerly known as Microsoft Flow, is an iPaaS (Integration Platform as a Service) platform that can be used to automate recurring tasks. It is part of the Microsoft Power Platform portfolio, together with products such as Power Apps and Power BI.



SharePoint

Store vital documents in one central place

SharePoint is a web-based collaborative platform that integrates natively with Microsoft Office. SharePoint is primarily seen as a document management and storage system, but the product is highly configurable and its usage varies substantially across organisations.



Power BI

Turn data into detailed visualisations showing real-time information

Power BI is an interactive data visualisation product with a primary focus on business intelligence. Using a range of connectors, you can link multiple data sources and create powerful, interactive dashboards to allow your organisation to better understand its data.

Real world examples of automation

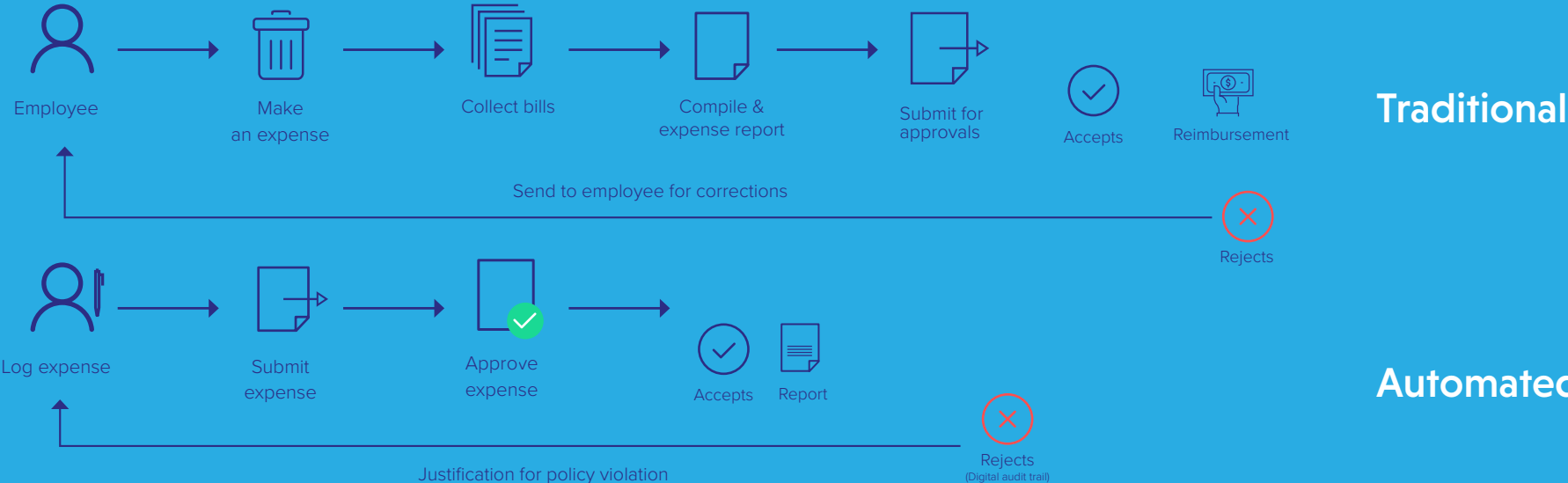
Let's take a look at some real-world examples of how data automation can and has, in many cases, been implemented into different departments to help streamline processes

Streamline finance processes with automated expense tracking

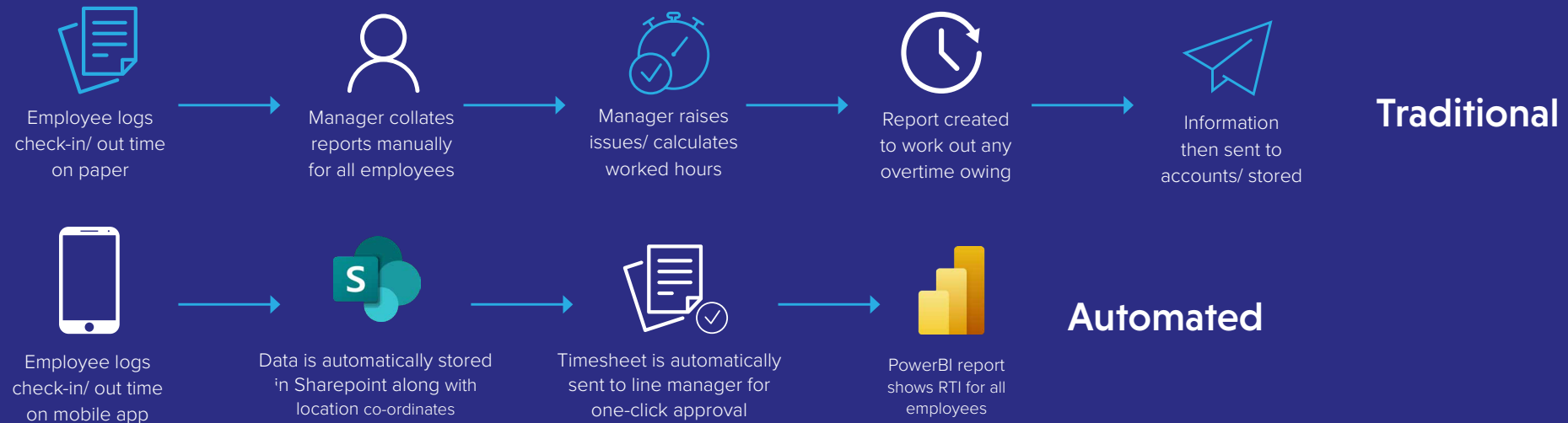
Manual expense management processes are time intensive, resource heavy and a burden on your employees. These legacy ways of working can result in human error and increased frustrations for employees and managers alike.

By utilising the power of Microsoft's tools, you now have the ability to automate this process from initial expense logging by employees, through to the approval of claims and even importing expenses into your accounting software. The key benefit of a digital expense management system is they make it far easier for employees to follow the rules. This eliminates most potential mistakes from occurring, such as overspending, double-entry and lost receipts.

Automating the expense tracking function isn't just about speeding up the process and reducing the load on your employees; it also allows you to automatically log vital documents in one central place, making it easier to find and retrieve when necessary.



Streamline HR processes with timesheet tracking and approvals



Manual check-in / check-out processes are not only laborious (for employees and managers alike) and prone to errors but can also be considered a burden on employees. Deploying an automated timesheet tracking and approval process opens a world of opportunity and insights, allowing you to not only streamline your HR function but also empower employees with better productivity. Here are three key reasons why you should implement a timesheet tracking and approval system:

Increased transparency and productivity

Understand working patterns of employees, empower better productivity and provide managers with detailed insight into employees' working days.

Real-time location updates

Utilising longitude and latitude features available in Power Apps, you can log the co-ordinates of employees as they clock in and out daily. This level of visibility allows you to understand where your workforce are, therefore providing better visibility and control.

Better insights

Using Power BI, you can connect your timesheet data from SharePoint, allowing you to turn these tables of reports into detailed visualisations and a better understanding about the time spent by employees during working hours.

Use the power of Microsoft Forms to elevate your marketing



Web form to collect user information



User information stored in database

Traditional



Web form to collect user information



Data stored in Sharepoint



Automated customer survey sent



Survey results collated and stored



Customer DOB used to trigger birthday offers

Automated

70% of businesses of businesses believe that an automation solution is necessary to build more effective teams

Source: KRC Research

Your marketing form can be so much more than just a tool used to collect data, which the business potentially stores forever and never utilises past its initial intended use. There are now endless possibilities that allow you to trigger workflows, create customer nurture streams and automate processes following a simple click of a form submit button.

By collating important user information from your form, you can trigger targeted offers, drive sales promotions and better understand your customers.

Here are some quick wins you can implement today:

- Set-up an automated email with a birthday offer to be sent out to customers, allowing you to create a more targeted sales interaction

- Trigger a post purchase survey to understand how your products and services are meeting requirements
- Personalise the experience for your customers by adding tokens into emails referencing their personal details
- Using the timed feature, you can trigger emails to be sent at your desired frequency or on specific dates to reference specific events, such as Christmas or Valentine's Day
- Harness Power BI to understand what products and services are resonating with different demographics

About Abtec

Abtec help our clients like you maximise your use of technology to work smarter and more efficiently.

We are a group of specialist technology companies that focus on providing our clients with secure and agile IT infrastructure, technology-enabled smart buildings and a range of professional services to inject expertise and transfer knowledge.

That includes ensuring that you're able to make the best possible use of the software and tools already at your disposal. We also provide guidance on any additional technology solutions or services you need to keep your business and your business data secure.

Established in 1991 and based in Leicestershire, we're trusted by SMEs across the country to support their business-critical infrastructure and applications. We work across sectors, including many heavily regulated industries where security compliance is paramount.

But we're more than simply faceless IT support: our relationships are built on forming true partnerships with our clients, that give them faith in the technologies underpinning and facilitating their business, its growth, and its security.

If you'd like to chat with us about any of the issues raised in this document, or just want to understand what your next steps might be to improve your security stance, please get in touch – we're always happy to help.

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Workplace automation is something that you can do straight away and with little to no investment. Identify now if you can access the powerful tools that will allow you to save resource and improve revenue. Contact Abtec if you need any assistance automating your business.