

FIVE STEPS TO AUTOMATION SUCCESS

AUTOMATION WILL ONLY BE SUCCESSFUL IF IT IS BACKED BY A SOLID PLAN OF EXECUTION

Here are five steps that an organisation can follow to ensure successful stakeholder, department leader and end-user adoption of ECM and BPA tools and solutions:

1 Choose someone to own and champion the project

The first step towards a successful automation project is identifying the right people to own, champion and manage the initiative. The project owner will take accountability for the day-to-day management of the rollout. The project champion will rally support for the project by sharing a vision for the future with the employees who will use the technology, as well as with the organisation's leaders.

The project leader and project champion must be able to:

- › Effectively communicate with all departments, including IT.
- › Understand the requirements of the end-users who will be using the new system daily.
- › Articulate the value of automation to different departments, employees and stakeholders.
- › Identify potential early adopters of automation and enlist their help in promoting the solution.
- › Break through end-user resistance to change by showing people how the system will benefit them day-to-day.

2 Get business-wide buy-in

The project champion should seek support for the project right across the business. Without wide support and adoption by managers, employees, external advisors and line departments, automation will not succeed. The project owner should find people in other parts of the business who are frustrated by manual processes. They will be allies in advocating for automation of business processes.

3 Understand current processes and pain-points

The next step for the project owner is to gather information about the process from end-users, stakeholders and any other involved parties. He or she should find out about the inconveniences and inefficiencies people encounter in their day-to-day work, so that the project can focus on sustainable wins that make a real difference.

4 Process mapping

The project owner should work with IT to map out the affected business processes, as well as speak to business users to understand their requirements and what they would like to see from an automated process.

Some questions to ask include:

- › Are there any obvious manual processes that could be automated for quick wins?
- › Is the task assigned to the most capable people at each point in the process?
- › Are there opportunities to improve efficiency by centralising processes and decisions?
- › Who should own and execute a process or task?

5 Training and change management

Making the switch from a manual to an automated process requires a significant change in employee behaviour, brought about through appropriate investments in training, adoption marketing and change management.

Some of the engaging tools companies can use to smooth the transition include:

- › Classroom training, tailored to the needs of different classes of users.
- › Online instructional videos.
- › Interactive online learning.
- › User group meetings

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