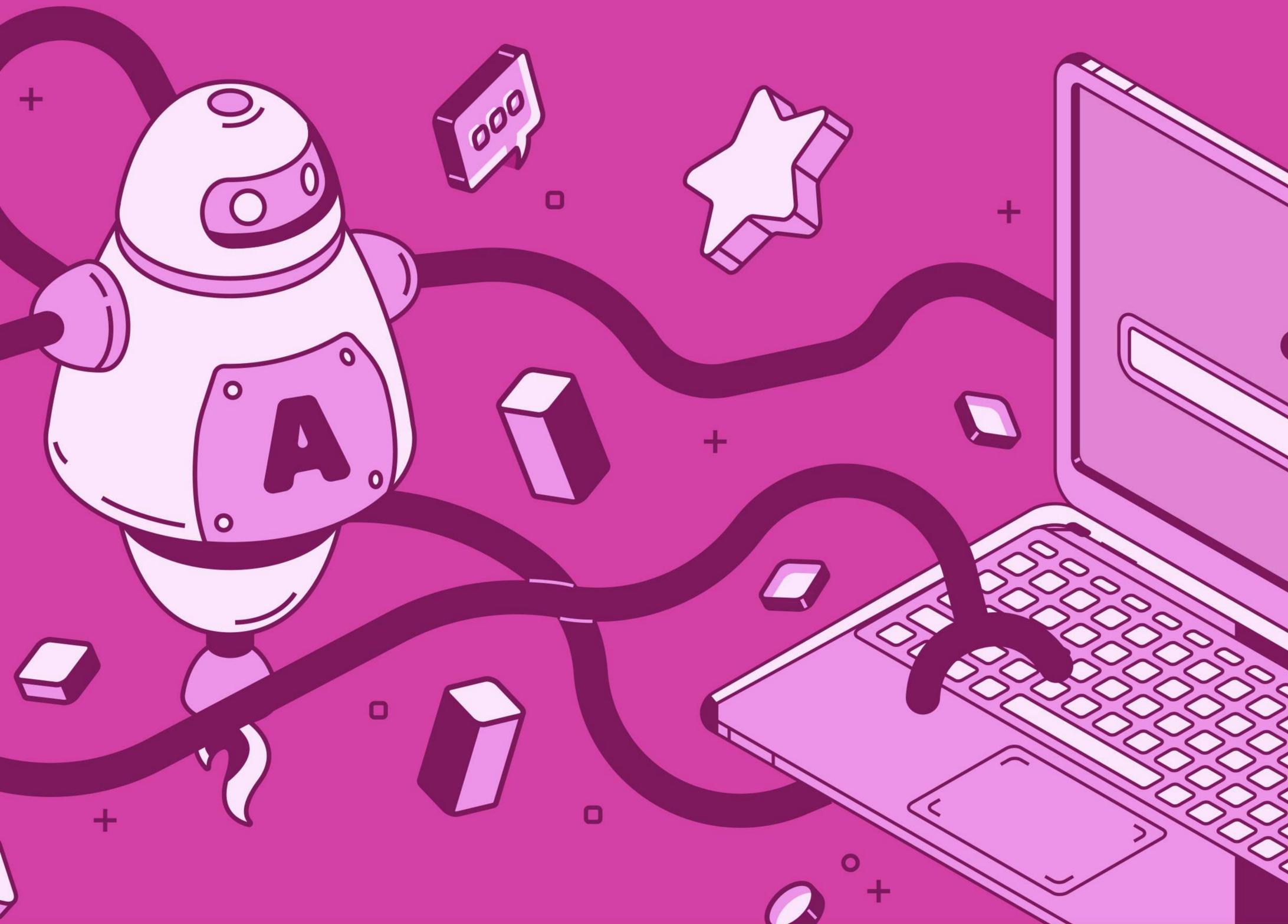


Automation Essentials

For Small Businesses



PREFACE



As a small business owner, you do everything you can to put your company on the right track. You make smart hires, invest in training your team, and pick software that you won't outgrow in two years.

But where are you on automation?

The US Council of Economic Advisors estimates that 83% of jobs paying less than \$20 an hour could be automated in the near future. The McKinsey Global Institute predicts that 20% of all jobs could be automated in a similar time frame.

But aside from lost jobs, how does a small business owner prepare for such an onslaught? What kind of preparations will ensure that your business doesn't suffer the same fate as so many other industries disrupted by automation? Can you embrace technology while also have a thriving workforce?

Automation is a present and increasing reality and, the sooner you can bring it into your company's culture and foundation, the better prepared you will be for the future.



Digital is

NOT THE

Solution

The first step in including automation into your company is to understand what automation is and what it isn't. To start, you need to understand the difference between digitized and automated.

For example, a company that has gotten rid of paper reimbursement forms in favor of fillable PDFs has digitized the form. Eliminating inter-office memos in favor of email is digitization. Turning your employee handbook into a wiki-style format is digitizing.

But none of these are examples of automation.

For automation, the enemy is not paper, but the manual transfer of data. If your travelling salesperson must download a reimbursement form, punch in all the data, email it to her manager for approval, and then forward the email and form to the finance department for processing, although the process has a facade of digitization, it's actually a labor-intensive manual workflow.

Automation seeks to eliminate as much of this manual transfer of data as possible.

In an automated workflow, your sales person would start with a reimbursement form that is already half-filled in with all of her details. After submitting all the details, she hits submit. From that moment, she doesn't need to do anything but wait for the cash to be deposited into her account. In fact, every member in the process needs only to complete their small role (i.e. approval, processing) while the transfer is handled without any human lifting.

In the book *Digital Transformation with Business Process Automation*, Keith Swenson of Fujitsu America says, "As we make everything digital, what is it that we are transforming? There is little to gain from digitizing things that are already automated. The real benefit comes from transforming things that are not automated; things that today are human processes."



WHAT AUTOMATION BRINGS TO YOU

1

REDUCED TIME

If you were to eliminate all the time your team currently spends manually inserting, creating, tracking, and transferring data, what kind of savings could you imagine? Automation helps your company spend less time on mundane busywork and more on things that matter.

2

REDUCED ERRORS

When you have an automated, predefined workflow for your processes, the chance of error is greatly reduced. Systems and machines almost never fail to accurately handle data. If you use intelligent forms and appropriate approvals, you can expect your processes to run with zero errors.

3

REDUCED COSTS

The alternative to an automated system is to hire someone to handle all the data generated by a single process and ensure its completion. It is likely that you already have people on staff who are performing some of these manual tasks. By freeing them up to do other things, you will have not only reduced errors, but also saved on labor costs that don't net much of a return.

4

BETTER TRACKING

When a process is automated, you can see the status of any item inside that process with a quick glance. Imagine processing 300 sales invoices a month and wanting to know what stage a single order is in. In a manual environment, this means searching through files, emails, and phone calls. In an automated system, it's a simple click of a button.

5

DATA AND ANALYSIS

With manual processes, it is extremely difficult to gather data on how well the process is running. You probably have no idea how long employee onboarding, vendor payments, or service requests take to complete on average if you have a manual system. When you turn to automation, you can see exactly how long the process takes, and where the bottlenecks are that you need to address.

Automation at Your Fingertips

This ebook provides you with a quick manual to bring automation into your organization at the easiest level - in your routine processes. As you work further with automation, you will see many more possibilities emerge.

To prepare your company for the future, creating a culture of automation is essential. In order to compete in an automated age, you must continuously seek out where your organization's time is wasted with mundane, manual tasks. Assign those tasks to a system and let your team work on more important work that is critical to your business.

The next chapters will guide you on how to take the very first step towards making automation part of your company's culture.

5 SIGNS YOU ARE READY FOR AUTOMATION



“The first rule of any technology used in a business is that automation applied to an efficient operation will magnify the efficiency. The second is that automation applied to an inefficient operation will magnify the inefficiency.”

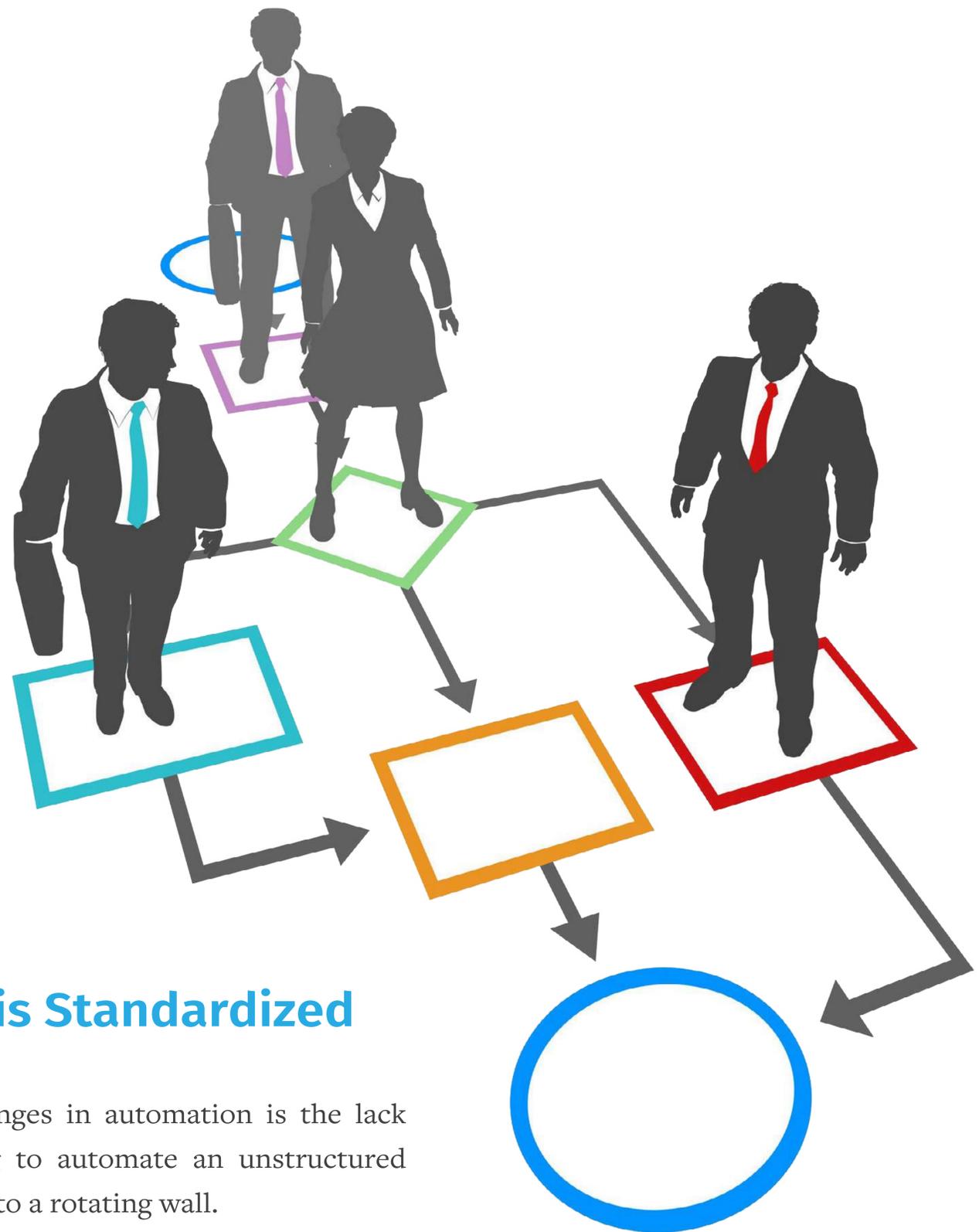
- Bill Gates

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The most important key to successfully introducing an automated system to your company is choosing the right process. Pick the right one and you can convince your whole company that automation is the key to the future. Select the wrong one and it may be years before you can try it again.

Automation won't fix the messes you have in your company. It will only improve the efficiency you already have. If you choose a broken process to automate, you won't see any benefits.

Here are five signs that you have a process ready for automation. Use these to identify the best process to start out with automation.



1. The Process is Standardized

One of the biggest challenges in automation is the lack of standardization. Trying to automate an unstructured process is like nailing jello to a rotating wall.

When you are looking for a first process, identify something where the workflow rules are already set and there aren't too many exceptions to handle.

If it is hard to get a clear rule on how a process should function, you should probably give it back to your team to rethink, even from a manual perspective.

Processes where everyone is clear on the existing workflow are also good candidates for initial automation.

2. There's Already an Existing Form

Having a paper or digital form for a process such as a travel reimbursement is a great sign that the process can be automated. It shows that someone has considered all the data needed to complete a request.

However, when you are working with an automated system, you can often augment your forms in ways that paper or PDFs don't allow. Think about the types of fields you will need.

Attachments? Dropdowns? Date and time fields? Most modern form builders include a wide variety of field types that will allow you to create a form that is even better than what you already have.

Your workflow automation software should be able to give you an enhanced version of your paper form that can even auto-populate common fields.



3. Miscommunication is Routine

This one isn't necessarily a good sign, but one that suggests that you have a lot to gain from automation. A major hazard to any business process is miscommunication, as it derails the whole process.

For instance, in your manual marketing budget approval process, an analyst attaches the budget plan in an email and sends it to the marketing head. But your marketing head's email inbox

is already overflowing and she never sees the email. In later meetings, there is a lot of miscommunication about what was agreed on.

Automation can help fix these communication errors because it enables each request to sit separately on a universal dashboard. Automation increases transparency and allows people to communicate better through the platform.

4. Accountability is a Consistent Problem

As a small business owner, you rely on your team to take accountability not only for their own actions, but of entire processes and parts of the business.

When a workflow is handled manually, it's can be difficult to hold someone accountable for every step. There's always something else to blame: technology, spam filters, not enough information, etc.

If you sense a lot of accountability missing from one of your existing processes, automation may be a big help. Automation brings in a lot of built-in accountability. For starters, only one person is responsible for the smooth functioning of the process.

This person handles assigning tasks, improving the form, and checking out reports. Within an automated workflow, each task has a single owner which makes it clear to everyone who a particular item is waiting on.

When the system itself is so easy to change and edit, no one can say they lost a form or didn't get enough information.



5. Tracking is Nearly Impossible

To ensure that a process is running well, you need to be able to see the status of any request at any time. In a manual process, this is extremely difficult.

Let's say you get an email from a vendor who has escalated an unpaid invoice. You send an email to your finance head to ask what the issue is. The finance head has to sort through spreadsheets, paper invoices, and her inbox before she's able to let you know what the problem is. This undoubtedly encourages blaming and defensiveness.

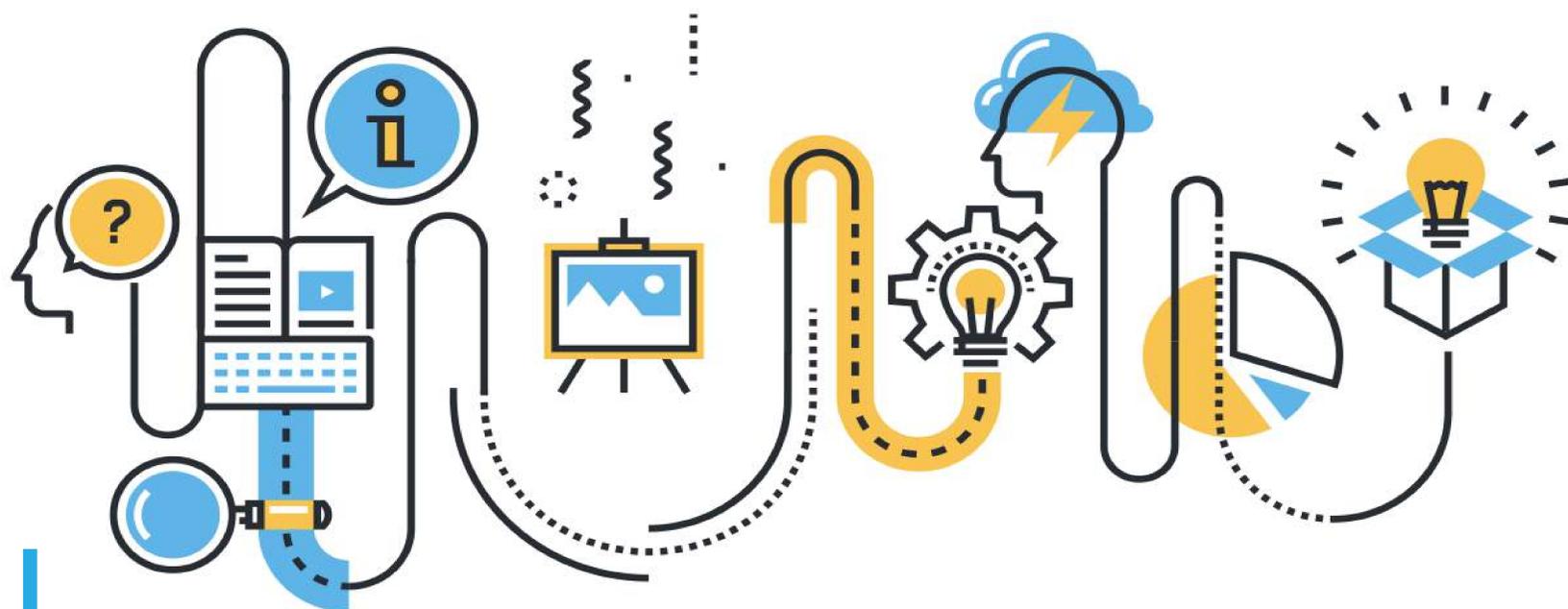
If you have a standardized process, but struggle to track items inside that process, automation might be a great asset for you. In an automated workflow system, all of this is done with a simple

click. Each vendor payment follows the same pattern. When the finance manager checks it, you can see that your COO forgot to delegate his tasks while on vacation and an approval is stuck with him. You quickly reassign the task and tell finance to expedite the payment.

Automation can be a great tool at any point in your journey, but applying it at the right time makes a big difference. Identify processes that are already mature enough to be automated and that have a big scope for improvement when it comes to communication, accountability, and tracking.

Read the next chapter to get a better idea of the common processes small businesses automate!

WHAT PROCESSES DO SMALL BUSINESSES AUTOMATE?



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There are dozens of possible processes to automate within a small business. We analyzed the data on what SMBs are automating on the KiSSFLOW platform and found that these were the seven most popular applications. See if any of these sound like a good place for you to start!

Click on any of the links to see a demo of these processes on the KiSSFLOW platform.

What Processes Do Small Businesses Automate?

(Click the headings for a Video Walkthrough)

01 EMPLOYEE ONBOARDING

The employee onboarding process should be simple, comprehensive, and easily reproducible. However, it is notoriously slow, generally misses some steps, and doesn't give everyone the same feel. When you automate this process, you can get rid of repetitive form filling. Once a new employee fills in all of his details the first time, the same information can be electronically shared with all the departments that need it. You can also build steps into your workflow to give custom surprises and make sure that someone's work station is ready to go on the day they arrive. An automated onboarding process means new employees are not only happy, but impressed with the automated culture you've created.

02 VACATION REQUEST

No big shocker here. People love to take time off, but the process of actually asking for leave can make you wish you were at the beach already. This automated process allows the requestor, manager, and HR team to work seamlessly together without paper forms or pesky emails.

Lots of SMBs use the Vacation Request app, and best of all, you can connect it directly with your Google Apps account, or use it to show Leave Balances so that everyone knows exactly how many days they have left to take.

03 PURCHASE ORDER

The purchase order is the heartbeat of most SMBs. But in a manual process, it can be painful and tedious to get the items you need while still respecting approvals and data needs. Especially when requests are pouring in from so many vendors, manual forms make the life of the finance team miserable.

Automation can drastically cut down the time taken to request and approve a purchase order. You can even create conditional tasks that only happen if an item is above a certain dollar amount.

04 PURCHASE REQUEST

Purchase Requests are the prequels to the earlier story. Purchase requests can mean the start of something great. Why saddle the process with unnecessary paper forms that make it hard to get anything done?

With an automated process you can not only streamline the purchase request process, you can also link it to a purchase order so that as soon as the PR is approved, a new PO is created.

05 TRAVEL EXPENSE APPROVAL

Submitting travel expenses is very time-consuming for everyone involved. Manual forms and workflows make the whole process even harder, no matter if the process uses paperclips and paper receipts or digital forms that have to be attached to emails.

In an automated process, the initiator can attach digital files and then check up on the status as the request smoothly funnels down the workflow. Automating the travel expense approval process improves the speed and efficiency of the process that saves time and enables the employees to focus on productive tasks.

06 PAYMENT APPROVAL

Manual payment approvals can be quite complex, especially when the approver doesn't have all the information she needs every time. Everybody wants more details and information. With an automated form, you can make sure that everyone sees exactly what they need to while also reducing the chance for errors and accountability by making fields read-only.

Automated payment approvals can also be conditional based on the amount, and can be automatically directed based on the purchaser's department.

07 SALES ORDER

Just because you love to see lots of sales orders doesn't mean you love to spend all day processing them. This is a customer-centric process and needs to be fast, efficient, and errorless. Processing the sales order manually makes it prone to mistakes and eats away at the time of your sales representatives.

Automating the sales order process results in faster order fulfillment, reduced backlog, and more motivation to keep your sales team out on the field rather than handling paperwork.

Anything Sound Interesting?

KiSSFLOW comes with nearly 50 pre-built apps like these that can give you a head start in coming up with an automated solution. You may have process you want to automate from Sales, Marketing, HR, Admin, Finance, or your basic operations.

Get creative and think about what makes the most sense for you!

Chapter Three

BUT... ?



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Now that you've seen how automated workflows can fit into your company, you are probably feeling both excited and skeptical. Sure, automation seems like a great way to put your company on the right foundation for growth,

but what are the common objections to it?

01

...won't automation be expensive ?

Some forms of automation can be expensive, but using a system to automate your core processes is a very cheap way to experiment. KiSSFLOW plans are priced per user and start with a minimum of only 10 licenses. That means you can probably get started with automation for less than \$100/month. And you can create an unlimited number of automated processes!

There are more expensive products out there, but many of them are needlessly complex and bloated with a lot of features that small business owners don't need.

There are also some open source platforms out there you can download for free. You might also use Google Apps Script or SharePoint to create workflow connections with your existing applications. All three of these options would require a lot of technical knowledge and someone on your team to constantly maintain them, or you would need to hire expensive consultants to set them up.



02

...do I really need another software platform ?

Aside from your general productivity suite, you likely have a few other core apps that you depend on for your daily work. Why load your team down with yet another application?

The brilliant thing about an automation platform like KiSSFLOW is that it can connect all of your systems together around the way you use them. You love the insights you get from your sales platform, but you want a quick way to approve and document discounts for your sales team, and also have that information documented on your accounting software. Through integrations, you can automatically connect all of your current systems.

You already use a workflow to connect these systems, it is just a very manual one that requires a lot of data transfer by humans. With an automated system, you can get more value from the software you already use.



03

...I'm not really a technical person.

Programming skills are not necessary to automate your office. In fact, the only thing that is required is a clear understanding of how you want the process to work. KiSSFLOW is a human-centric process automation platform. This means that you can design your form and workflow in the way that makes the most sense to you, without needing to worry about any coding or programming. And if you ever need help with something, our team is available to help through instant chat.

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04

...do I have to maintain it ?

KiSSFLOW is a cloud-based product. With on-premise solutions, the buyer is responsible for maintenance, updates, versioning, and many other headaches. When you buy a cloud-based solution, you not only get the convenience of being able to login from any device around the globe, you also get the top-rated security that comes from Google and Amazon, where KiSSFLOW is hosted. We take care of all necessary maintenance, provide regular updates and improvements, and keep the bad guys out of your account.

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05

...am I killing jobs by using automation ?

As we move further into an automated world, many people are worried about the potential loss of jobs. However, as our computers become more capable, every business owner needs to seriously think about how they plan to merge software and people. Smart owners will create a team of very efficient software combined with very capable humans who can perform a task together. Small businesses probably won't ever layoff any employees as a result of automation. However, you may need to think about those employees whose role is exclusive to manually transferring data and assign better and more meaningful work to them that is more suited for humans.

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Chapter Four

HOW DO I START?



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When you are ready to implement automation into your business,
here's a good game plan.

How Do I Start?

01 PICK YOUR PROCESS

Start with a process where you can see obvious results and where there aren't any immediate risks.

02 MAKE SURE THE PROCESS IS CLEARLY DEFINED

Remember that automating a bad process won't help you at all. Meet with stakeholders to ask them what they would like to see in an automated process. What benefits are they looking for? Do you need to be able to connect with other software platforms? Do you need to be able to create conditional steps? Do you need to be able to hide some data from certain task owners? At this point, you don't need to use any software, just map it out on pen and paper.

03 PICK YOUR PLATFORM

After you've figured out what you need, it's time to go shopping. Many companies get this wrong and start with the software, only to find out that it lacks key features, or they get buyer's remorse after spending a lot of money on something that doesn't work well. Know exactly what you are looking for first, and then go find workflow automation software that fits.

04 CREATE YOUR AUTOMATED FORM AND WORKFLOW

If you choose the right software, this should be a fairly quick and easy step. You should be able to configure all of your settings like email notifications, assigning deadlines, and configuring accessibility.

05 GO LIVE, COLLECT DATA, AND OPTIMIZE

Once your automated process is up and running, you will likely have a few wrinkles to iron out. After it has been functioning for a few weeks, you should have good data to let you know how well the process is functioning. Plug in some analytics and discover the best places to make improvements. Go back and adjust your workflow and form as needed to make sure that everything is running at peak performance!



READY TO START?

Automation is coming to your industry in a big way. As a business owner, you have an obligation to make sure you are prepared so that your company will be able to thrive in an automatic age rather than struggle to keep up.

If you think your business is ready to try automation, turning your manual processes into sleek workflows is the best place to start.

[Try KiSSFLOW today](#) and see how you can lay the right foundation for your company's future!