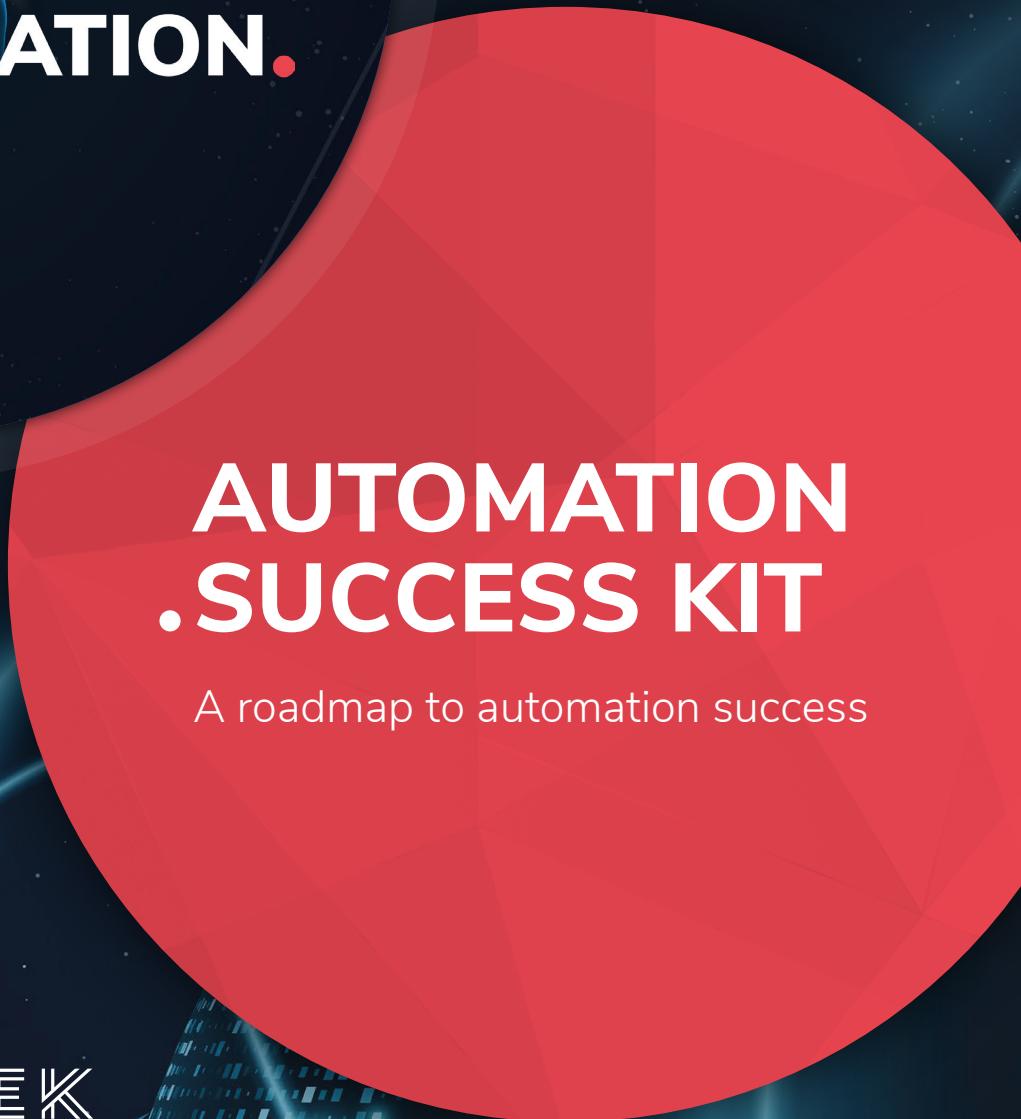




**THINK  
AUTOMATION.**



**AUTOMATION  
.SUCCESS KIT**

A roadmap to automation success



**.SYNAPTEK**

# Speed, flexibility and agility are • the real competitive battlegrounds

Never before have businesses had such complex IT environments consisting of so many technology platforms and applications. As businesses grow the complexity increases too.

## The right business automation strategy • simplifies this complexity

The right business process automation strategy simplifies this complexity and enables businesses to be more productive, cost-efficient and agile.

It's impossible to ignore the vast benefits that automation can deliver, but it's essential to carefully define your strategy before embarking on an automation project, in order to avoid costly mistakes. Defining your goals, aligning these to your business and workforce needs, and carefully selecting the right systems and integrations is vital to success.

With so many solutions on the market and such diversity between how businesses run, many business leaders don't know where to start with an automation strategy. That's where we come in. Read on for a roadmap to a successful automation strategy.

# START YOUR AUTOMATION JOURNEY

## 1 DEFINE YOUR GOALS

Start with your strategic goals and work backwards to the technology, not the other way around.

To get this right, determine where you are today and where you want to get to. Consider the competitive landscape and where you want to fit in the future. Engage representatives across every line of business to identify the process pain-points that are holding you back from achieving your goals. Highlight those which would be the most inflexible if you were faced with an unexpected opportunity or threat.

Addressing these barriers is key to identifying where system integration, process automation and improved collaboration could have the biggest impact on business continuity and growth.

5 key benefits of automation to consider when defining your goals:

### 1 Getting the best out of your people and your systems

Klaus Schwab, the author of The Fourth Industrial Revolution, calls for leaders and citizens to “together

shape a future that works for all by putting people first, empowering them and constantly reminding ourselves that all of these new technologies are first and foremost tools made by people for people.”

Keeping focus on this is key to developing a successful automation strategy that will drive your business forward. There is a misconception that automation is simply a cost-cutting solution that reduces manual tasks, but the real value is in how automation can drive innovation and deliver a competitive advantage.

By connecting systems, people and processes, your business is better able to harness the power of technology to increase productivity, improve collaboration and reduce cost-inefficiencies. This gives your workforce more time and resource to focus on innovation and the more value-added aspects of their role.

If cost-cutting is the only objective of your automation project then you will miss the vast opportunities to improve ways of working and deliver better user and customer experiences that set your business apart.

## 2 Improving employee and customer experiences

Customer experience is everything – and this applies to both your internal and external customers.

The likes of Amazon and Uber have shaped our expectations for simple, automated, accessible anywhere experiences and businesses need to adapt quickly to remain relevant or risk losing their customers – and their best talent – to the competition.

Automating experiences and connecting data points across the business enables better insights into changing consumer behaviours and makes it easier to respond quickly to future needs.

The right system integrations and intelligent automation also enable businesses to deliver the best employee on-boarding experience and ensure staff are able to do their best work wherever they are, which is essential for businesses to recruit and retain the best talent. The digital-first generation will be unlikely to join or stay with a company that has outdated, manual processes.

## 3 Protecting business continuity and improving data insights

The strength of any business hinges on its ability to continue working and be productive under any circumstances. With so many business processes now reliant on technology, the complexity involved in protecting business against the risk of downtime is greater than ever.

Automation reduces this risk and enables better insights into opportunities and threats. From cyber security to network

capacity to responding to consumer behaviour changes, automation gives your business the visibility and agility to respond faster than ever before.

Big Data offers businesses huge opportunities, but only if they're able to harness the insights from it. By connecting systems, improving collaboration and creating a single source of truth, your business is better able to gain a competitive advantage from Big Data and protect this most valuable asset.

## 4 Connecting siloed systems and processes

Siloed systems and working practices are a huge barrier to speed and innovation in businesses today. They also pose a significant risk to businesses in the era of Big Data. Businesses are awash with platforms and applications, but most of these don't talk to each other. This means data ends up being stored in multiple locations and duplicated across the business, presenting a security and governance nightmare, hampering work and slowing decision making.

Intelligent automation rapidly connects people, processes and platforms, transforming collaboration and creating process efficiencies that supercharge the speed of work. Ultimately, this saves time, resources and money that can be reinvested into innovation.



## 5 Reducing errors and the burden of repetitive tasks

As the complexity of businesses has increased, so too has the risk of human error. Despite all of the advances in technology available to businesses, many processes are still highly manual and repetitive. The burden of administrative tasks is huge in almost every line of business, but process automation can quickly relieve this by automating many menial, time-consuming tasks.

Even the curse of email overload can be reduced by better connectivity that improves channels of communication and moves reliance away from the siloed email inbox.

This is only one facet of the benefits of automation, but it is one that reduces the risk of human error and vastly improves ways of working – a win win for everyone!

## 2 REVIEW YOUR CURRENT TOOLSET

Audit the hardware and software across your business to identify what is fit for purpose, what is no longer suitable and what you knew nothing about!

It's important to identify the systems with and without APIs to get a full picture of the integration and automation challenge ahead.

### Don't forget about shadow IT

Shadow IT is the use of cloud services that are managed outside of the IT department, often without its knowledge. The accessibility and ease with which SaaS platforms and applications can be downloaded with just a credit card has led to an explosion of shadow IT.

Many employees and departments have resorted to finding their own solutions to process inefficiencies by side-stepping traditional IT software requests and purchasing technology that makes their job easier. This may improve employee productivity, but it creates a governance and security issue that could put businesses at risk.

IT departments need to regain control of all software to ensure data is secure and platforms are fit for purpose. To do this without causing friction, IT teams need to be empowered to make investment decisions faster. This will be achieved by ensuring the IT team has a deep understanding of the strategic goals of the business.

## 3 DEVELOP YOUR STRATEGIC OBJECTIVES

What do you need to achieve your goals? Identify the steps required to get from where you are today to where you need to be. Consider your current organisational structure, available resources and technical architecture to identify where there are gaps that need to be filled. It's also essential to consider your company culture and identify any need for evolution there too. How will you implement new ways of working and who will be affected?

Don't be constrained by how you work today; instead, think about how you'd achieve your goals if you had a clean slate. Remember, you need to start with what you want to achieve and then identify the technology to achieve it, not the other way around.



## 4 ENGAGE AN AUTOMATION PARTNER

You may want to engage an automation partner from the outset to help define your strategy and audit your technology, but it's at this stage that it's critical not to attempt to go it alone!

Evaluating the best platforms and integrations required to deliver your strategy is challenging for any busy IT leader. With so much choice and all vendors promising different

pieces of the jigsaw, consulting with experts in the field will ensure you invest in the most flexible and scalable solution.

Your automation partner will help you to select the best-of-breed technology to meet your needs and put together a robust business case for investment. Justifying return on investment is easy when you have clearly defined goals.

# TAILORED TO YOU

Many automation solutions that businesses employ today connect application to application. The challenge here is that when applications are no longer fit for purpose, switching the platform out may be complex and costly, with a risk of significant downtime.

We connect businesses “wall-to-wall” in a way that platforms can be switched in and out with ease. We’re also platform agnostic, so can work with the applications that fit your business best – even bespoke legacy systems can be reinvigorated! We tailor solutions for you.

## 5 INTEGRATE, AUTOMATE, COLLABORATE

Work with your automation partner to translate your strategic objectives into detailed tactical plans. Together, carefully define the platform integrations and process automations that will quickly increase productivity, reduce inefficiencies and improve collaboration throughout your business.

Communicate with stakeholders and engage suppliers where necessary to ensure everyone is aligned and working towards the same strategic goals.

### **Important considerations: Microservice versus monolithic**

The technology architecture decisions you make will effect the long-term flexibility and agility of your IT environment. A key consideration is whether to invest in a Monolithic service or Microservices.

Put simply, we liken the question of Monolithic versus Microservices to a box of chocolates versus a pick 'n mix!

Monolithic systems may be packed with functionality, but this isn't tailored to the individual business needs and there will be services that will never be utilised, but which consume server space (imagine these are the coffee creams in our chocolate box!). They can also prove costly and inflexible. Microservices, however, are made up of smaller, modular software services that can be tailored more precisely to the needs of each business and how it operates. Microservices are a more flexible and cost effective solution that is easier to scale in a modern, agile IT environment.

## 6 ENGAGE HEARTS AND MINDS

Any transformation project will only be as good as the people delivering it, so a robust change management strategy should form part of your automation strategy.

Excellent communication and employee engagement are vital to reduce friction and ensure a smooth transition to new ways of working.

We recommend nominating “Change Champions” within your teams who act as a communication channel between the automation project leads and end-users. This will ensure everyone is well informed and is brought along on the transformation journey.

### Better ways of working

It's important to quickly address any concerns that automation will lead to large scale job losses, in your communication strategy. We're always quick to highlight that some of the most successful automation technologies in history were not developed to replace humans, but instead to make work easier so that the human workforce has more time to focus on tasks that require more strategic thinking, empathy and emotional intelligence.

Intelligent automation not only reduces mundane, repetitive tasks to free employees up for more engaging work, but it also delivers solutions to common business issues that would otherwise be slow to address or at risk of human error. This could be anything from up-scaling server capacity to meet unexpected demand, to automating employee on-boarding processes to attract and keep the best talent.

Of course, we can't deny that some individuals may be directly impacted by their job becoming fully automated, but carefully communicating the competitive advantages and business continuity protection that automation delivers should help to reduce large scale friction within the workforce.



# 7 DEMONSTRATE PROOF OF VALUE

Carefully select the first business processes to automate based on how quickly they will add value and how scalable they are.

We typically deliver a Proof of Value (POV) automated process within 2-3 weeks, so we can quickly demonstrate the power of automation to meet our client's strategic goals. This doesn't mean the process isn't complex, but we identify opportunities that can be built upon as a foundation for other process automations across the business, which makes roll-out faster and easier.

Check out our Case Studies page to find out how we've delivered business-changing automation for our clients.



# 8 SHARE SUCCESS & LEARNINGS

As you deliver each successful automation, review the original objectives and the outcomes to inform ongoing projects. Make sure the benefits are shared throughout the business to showcase the power of automation.

You should be prepared for an influx of automation project requests from teams within different lines of business as they understand the tangible outcomes and opportunities of process automation. With the right stepping stones in place to quickly deliver successful automation projects, you can expect an avalanche effect!

## 9 MAKE AUTOMATION A COMPETITIVE ADVANTAGE

Change is the new constant in business today and process automation enables businesses to be more reactive and responsive to change. Business continuity is improved because the technology is in place to keep the business running under almost any circumstances. So, embracing process automation as the norm, not the exception, will future proof your business.

To ensure automation has a consistent place in your overarching strategy, business technology leaders must

be at the heart of the strategy development discussions from the outset. If there isn't an IT representative on the Board already then now is the time to address this so that all technology investment decisions are aligned with the strategic vision of the business.

If you require ongoing support in this area, we deliver a Virtual CIO service that provides the expertise to ensure your IT solutions are aligned with your strategic goals and end-user needs.

## 10 CUSTOMER EXPERIENCE IS THE ONLY TRUE DIFFERENTIATOR

The final step in your automation roadmap is a reminder to never lose sight of the customer experience. We are in a consumer-led era that puts the survival of businesses firmly at the feet of the end user. Whether you're delivering to an internal customer or an external consumer, the primary focus of your automation journey should be delivering an outstanding customer experience that sets you far apart from the next best competitor.

We're here to help ensure your automation strategy is designed to make your business stronger, more productive and more agile so that it's better able to adapt quickly to the changing needs of the customer and the ever-evolving environment we live in today.

“Synaptek has created an exciting proposition in an emerging and potentially huge market. At Virgin Trains, we are constantly looking at innovative technologies that will improve the experience of our customers and we see Synaptek’s intelligent workflow automation as a key way of achieving that.”

*JOHN SULLIVAN, Chief Information Officer, VIRGIN TRAINS*

“What Synaptek has delivered in such a short space of time has been nothing short of awe-inspiring! We’re really excited for the future and are delighted to have found such a successful partnership with Synaptek.”

*MARK BLAKELOCK, Chief Operating Officer, PERFECTHOME*

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