

# Interdepartmental Workload Automation Collaboration Guide

The collaboration between you and other business units to automate manual processes and tasks is essential for improving efficiency, reducing errors, and driving digital transformation. Helping them helps you.

## Understanding Business Goals and Processes

Start by gaining an understanding of the specific goals and processes of the business units you are working with. You may want to meet with the department manager first before calling in the rest of the group. What are their key objectives and goals? Ask questions to help you discover their greatest needs. Let them know your job is to make their job easier—it won't eliminate their job.

Objectives: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Identify Automation Opportunities

Collaborate to identify the manual processes and tasks that are perfect for automation. For example, does someone in the department have to ask you to kick off a job after placing a file in folder? A self-service button could be the answer to saving you the effort to kick off the process and the time they must wait for you to do it. Do they have to log in to multiple applications just to move a file? Again, a self-service button will empower them to start the process without your intervention.

Manual Tasks: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Prioritize Automation Tasks

Work with the department staff members to prioritize automation projects based on impact, feasibility, and alignment with strategic goals and objectives. Focus on quick wins to demonstrate value early.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## User Training

Create the workflow—then walk staff through the process. Show them how easy it was to set it up and perform a test run. Seeing is believing! Address any concerns or resistance to change. Be open to questions at any time, but hold meetings to make sure issues or concerns are addressed. Be patient during the process, and it will pay off for everyone.

## Scale and Expand

Once an automation project proves successful, consider scaling it to other areas within the business or across different business units. Word will spread of what you've done for the first department. Other departments may start coming to you to automate processes without any prompting. What are other departments that would benefit from process evaluation and automation projects?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## Measure and Report Return on Investment

If possible, continuously measure the return on investment (ROI) of automation projects. This helps justify the effort and resources invested and guides future decision-making. Your executive team may not understand the value of OpCon. By accounting for the number of hours saved, the estimated value of that time, and the enhanced continuity of the organization, C-level staff will better understand the return on the investment.

# Calculate the Savings

Tasks	FTEs hrs/month	\$/hr	Total
#1	20	25	\$500
#2	15	35	\$525
#3	17	30	\$510

\$1535

**\$1535 x 12 months = \$18420/year**

## Communication and Documentation

Maintain open communication channels with business units, keeping them informed about progress, changes, and upcoming automation initiatives. Document processes, configurations, and best practices. Use OpCon to reinforce those best practices using the documentation fields and labeling jobs, so they can be easily identified if it fails.

## Create an Enterprise-wide Automation Culture

Encourage a culture of automation and innovation. Removing one manual task from a person could provide them with new opportunities. For example, they could start attending a meeting they normally could not attend and find the time to do business-critical work.

Try gaining support from top-level executives and leaders. They should champion the importance of automation and demonstrate their commitment to its adoption. When leaders prioritize automation, it sends a clear message to the entire organization. When you have buy-in from everyone, the whole organization embraces automation to drive efficiency, innovation, and greater customer satisfaction.