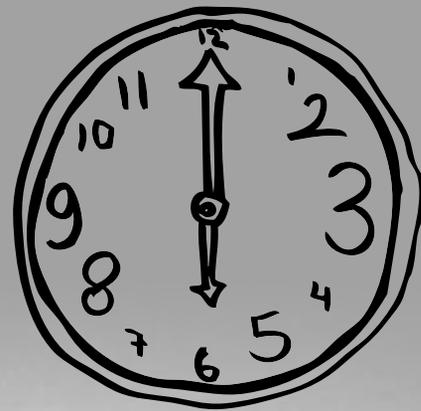


TIME TO AUTOMATE YOUR PROCESSES

INNOVATE

BY HEATHER REMER, CEO, COMPUTERCARE LLC

For a brief time several years ago, I worked for a private hospital, where I remember being incredibly disappointed at the process flow. Immediately, I was struck by the huge amount of paper in the offices: mounds of papers cluttered desks and papers pinned on top of papers covered bulletin boards. Finding a simple phone number for another agency or department took forever as staff thumbed through documents and moved from desk to desk trying to locate one piece of paper that had a phone list we desperately needed.



What frustrated me the most was how much the chaos decreased efficiency, which, of course, directly affected the patient experience. Sadly, many businesses still operate this way rather than adopt efficient approaches to their business processes. Fortunately, tools are constantly evolving that can significantly increase efficiency in business process flow and improve client experience.

However, few of us have the time to dig into developing automation systems for our businesses. So, here are some thoughts to get you thinking creatively about ways that automation might improve your business's efficiency.

ASK YOUR STAFF

Start by asking staff about which routine processes or tasks they find frustrating or time consuming — you might be surprised at how quickly they can rattle off a list. They may even already know of applications or software solutions that would help to make them more efficient. One of my technicians recently came to me with a great phone app that will make logging travel a breeze by producing a biweekly Excel report with all the information we need to get employees reimbursed. This will be a great time saver for my staff when they are in the field.

But, maybe your staff is a little resistant to change. Try probing a bit. Look for processes where things get bottlenecked up around one person because they don't receive the email or forms they need. You also want to look for areas where data is being duplicated. Ponder whether you could capture the data all at once rather than manually entering it into multiple systems.

GET RID OF THE PAPER

Do you have areas in your organization that are "paper heavy"? Paper gets lost, shoved in a drawer or file or accidentally shredded, so save a tree and digitize it. Just the process of converting from a manual process

to an electronic process will get you and your team thinking up new, more efficient ways to process the information in those documents. What a great way to build creative thinking!

Take a look at what documents you use in your office and where they are stored. Who needs these documents, and why? Do they serve the purpose they were designed for? You may find that this is a perfect time to tweak those outdated paper forms before you turn them into electronic versions. The adage "garbage in, garbage out" applies here.

DON'T JUST SHIFT EVERYTHING TO EMAIL

Even if your desktop isn't cluttered, that doesn't mean your workspace isn't cluttered. If you just take all your documents, digitize them and start passing them around through email like mad, you really aren't doing much for process flow. Instead, think about how you can reduce the number of opportunities for information to be lost or bottlenecked at specific locations. Working from the same file (that is usually backed up) with version control and check in/check out features is a great start. Sharepoint or other cloud solutions are great for this. But, even a local server can get you moving in the right track. Your email application can be a huge efficiency advantage if utilized well (particularly if you take advantage of features such as tasks, categories, etc.). But, email can also be a black hole from which nothing escapes if it is left unorganized without processes.

DON'T ASSUME YOU ARE LESSENING THE CLIENT EXPERIENCE

The business owners I talk to are often fearful of automating processes because they worry that clients will feel that the personal touch is being sacrificed. This boils down to company culture and strategy. For many companies, the decision to replace the personal phone call with

an automated email is a difficult one, and replacing a personal touch with an automated process can be risky. You definitely need to consider the customer experience, not just the bottom line. But, think it through. You may find that your customers are just as happy, if not happier, to get the automated email if it means the end product or service they are seeking arrives faster or with a higher quality because you've freed your staff to proactively deliver your product or service.

Whatever you decide to do, try a test run first to see how it works and fine tune from there. Be prepared for some resistance. We are often quite comfortable with the status quo and are quick to create time consuming work-arounds that get the job done, even though they may be less than ideal. These are just some simple things to get you thinking. Keep in mind that the more you can free your team up from distracting or annoying routine tasks, the more time they can be actively engaged in the core functions of your business — and that will benefit you and your customers.



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