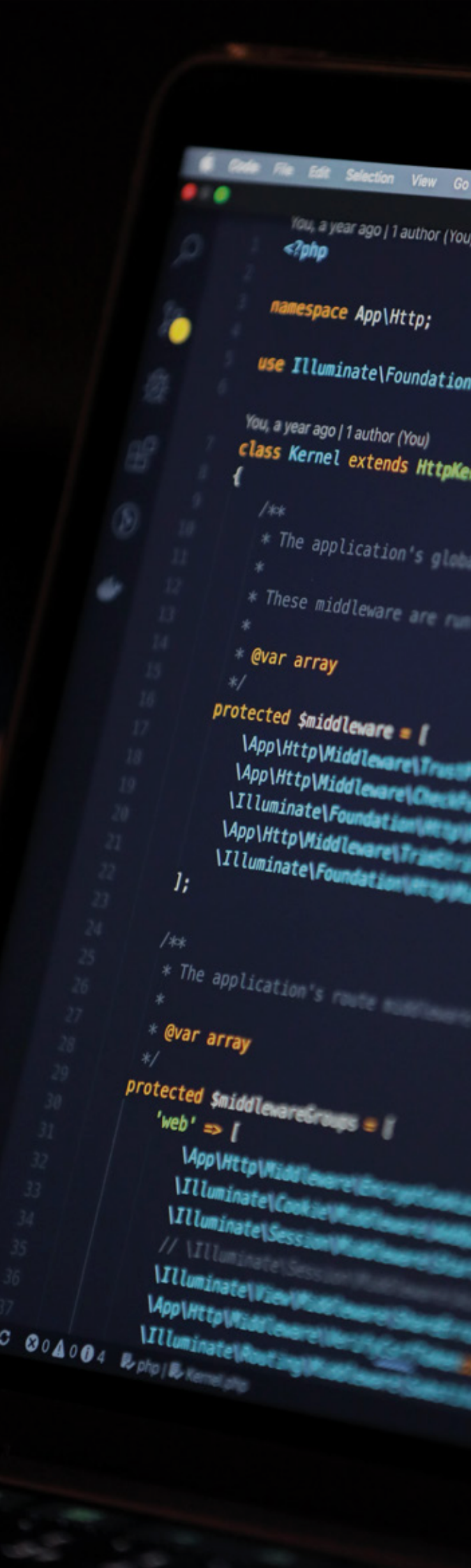


Scaling

LEAWARE

Scale your Company Through Digitalisation

Automate & Succeed



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HOW AUTOMATION HELPED COMPANY

Process automation is the natural path for companies developing digital products today. This is due to the fact that it seeks to standardize the processes so there are fewer errors in the way of designing digital products.

The goal is to ensure that the activities carried out in different areas of product development have high quality standards and that they self-manage themselves to reduce rework and increase the perception of users in their experience with the product they are acquiring. As businesses transform and align in the digital world, the need to implement a solution that facilitates process automation is accelerating. This, to speed up the execution of the applications; minimize errors and boost the productivity and success of organizations.

At Leaware we fervently believe in automating our processes, because they are the basis for creating and managing quality and modern standard products. The important thing about these processes is that the system evaluates, compares, analyzes and improves itself continuously, this is the beginning of the innovation and restructuring of many digital products in real time. The main objective of automation is to improve the workflow of an organization through the continuous capture of improvement opportunities in all processes.

Among some advantages can be mentioned:

- **Decrease in the workload of human hours through software**

- **Standardization of what is produced**
- **Costs reduction**
- **Waste reduction**
- **Productivity increase**
- **Real-time control of processes**

The automation process has to assess the organization's commitment to its implementation, execution, monitoring and control. Among some cases of companies that were successful after the implementation of the automation of their processes:

- **Siemens**
- **Mitsubishi electric**
- **Toshiba**

A real life example:

Sariki Metrology, a member of the Unceta Group, is a comprehensive provider of dimensional measurement solutions with more than 35 years of experience. Before COVID-19, they found it increasingly necessary to optimize their travel expense management process. For this company, the choice and implementation of the software they work with is an issue that they attach great importance to. For this reason, they went through a phase of assessing various options and, finally, chose to work with Sabbatic (software). For the IT department of the company, the integration of this tool was not that hard.

Currently they have everything automated and all the information they need available on the platform, with the possibility of importing all the data to their ERP. With these data they can record the entries of the invoices, register new suppliers and more. They have experienced an increasingly rate of their productivity and effectiveness in their process.

MYTHS ABOUT PROCESS AUTOMATION

Many of the doubts about the automation of processes in different organizations stem from uncertainty and the fear that it will not be effective and will cause delays in production activities and could affect the quality of what is produced due to the lack of control in the processes. There is also the belief that in automated processes errors of some kind are not witnessed, where the controls are such that it is ensured that the runs of the products do not have reprocesses, for which it is believed that they should lack periodic reviews and constant monitoring. These ideas cover the generality of what is believed to be achieved or not achieved through the automation of processes.

The following myths can be mentioned:

-Many robots are necessary: It is not like that. Organizations that have applied process automation show that with little software they achieve their goal. 95% of the organizations have applied the automation of their processes and they have achieved an increase in their productivity.

-Automation is not applicable to any process: Process automation is easily applicable to many processes, but there are some processes where an organization benefits greatly when automation is applied, such as:

1. Human resources
2. Accounting
3. Sales
4. Tourism
5. Banking
6. Real estate
7. Inventory
8. Insurance
9. Logistics and transportation

-The automation of processes has a bad effect on customer satisfaction: The optimization of processes by automating them, in any area of the company, favors customer satisfaction because the processes will take shorter and the final product is standard.

-Applying technologies associated with the automation of processes implies the substitution and transformation of current technologies: The process automation process, as well as the technology associated with it, can coexist with legacy systems and become the tool that companies require to modernize their current systems. Many companies have been working with this kind of tools for a long time and store a large amount of information, so radically changing the system is quite complex, so process automation should be seen as the bridge that organizations need to establish to get to this digital era and current technology.

-Process automation will eliminate jobs: Decisions in jobs are made by people, which is why process automation should be seen as a tool that will make work faster and smoother and not as a substitute of human labor.

There are irreplaceable human characteristics that are extremely necessary in the business world, such as:

1. Critical thinking
2. Empathy
3. Creativity
4. Innovation

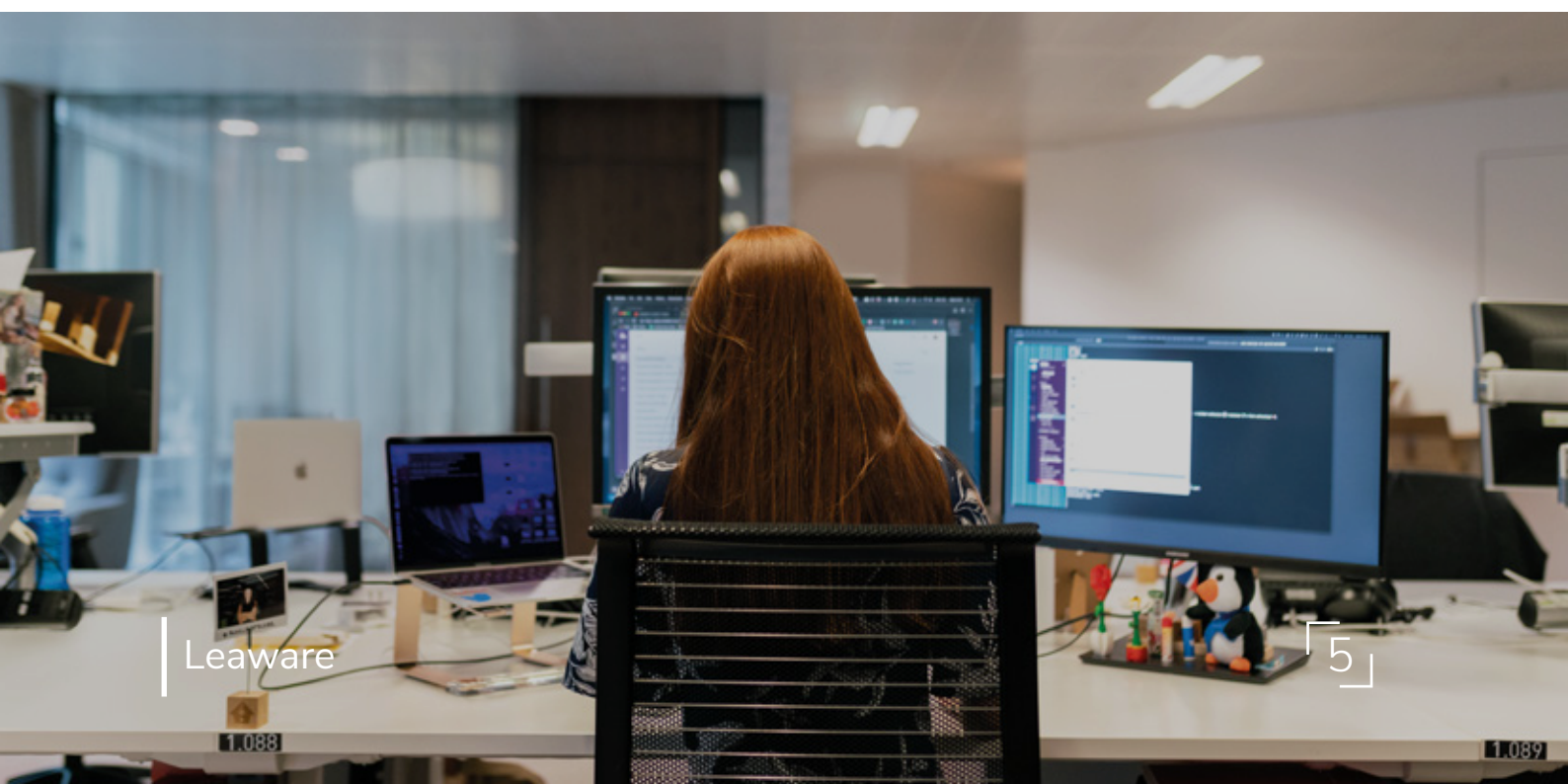
-Process automation is only for large corporations: Unlike large companies, medium and small ones must adapt their processes to those recommended by these tools. This way they can take advantage of them without incurring great costs. Ideally aiming to focus on high-volume tasks, repetitiveness and little added value to the business.

-It is a very expensive technology to implement: Many global providers of process automation request, in addition to licenses for their products, to use an ecosystem with other licenses (operating system, databases...). However, open software ecosystems can be used that greatly reduce the implementation value. It is important to always evaluate the cost of not automating to really understand what is the real cost and always evaluate the long-term benefit.

-Automation of all processes takes a lot of time: It may be true that process automation management takes some time, but it is very effective once implemented and the objectives of the organization are quickly achieved.

-It is a hardware and software platform that is difficult to understand and operate: While it is true that knowledge is required to implement automation, operate and maintain automation systems, the complexity is not so great because the technology is available for some time and there are many trained people, especially if you use brands that already have a recognized track record in the market.

-A system that lasts a long time is needed: The systems are designed to be robust in terms of the quality of their components, which allows them to function normally in aggressive environments and not present failures, however they are conceptualized to adapt to the needs of the operation according to the type of industrial production that the company has. Hardware and software updates allow us to adapt to these needs in order to maintain a reliable and competitive operation.



CONCEPTS

DIGITALIZATION

It is the process of transforming analog processes and physical objects into digital ones. It is used to describe the general process of going digital; that is, moving the business marketing plan to a more digital future. Just consider the networks and how uploading a social image makes it immediately available to everyone who would want a copy: that's the right implementation of document digitization. Digitization encompasses more than just invoices, receipts and contracts. Virtually everything can be made digital and thus become more convenient.

DIGITAL TRANSFORMATION

Digital transformation is the integration of digital technology in all areas of a company, fundamentally changing the way it operates and provides value to its customers. It may involve reworking products, processes, and strategies within the organization by leveraging digital technology. Digital transformation enables organizations to better compete in an economic environment that is constantly changing as technology evolves. To that end, digital transformation is necessary for any business, nonprofit, or institution looking to survive into the future.

INTEGRATION

The integration of an organization's processes into the digital age must be done in a fluid and controlled manner in order to be effective.

Integration is important so that as a whole all the processes are gradually adapted and can be aligned with the objectives of the organization that wants to enter the technological stage. Technological integration is the fusion of the tools that unite the latest generation devices. The goal is to optimize processes, improve their competitiveness and offer new added value to their customers. Incorporating digitization into all company processes generates undeniable competitive advantages in the short and long term:

- Promotes the culture of innovation in the company
 - Improves the efficiency of processes in organizations
 - Contributes to promoting collaborative work and internal communication
 - Provides rapid response capability in a changing environment
 - Offers new business opportunities thanks to data analysis
 - Improves the customer experience and its relationship with the brand
-

PROCESS AUTOMATION

Process automation is the integration of software applications, people, and processes through a defined workflow. By implementing it, it is possible to eliminate errors, reduce costs and time by making activities more efficient, replacing manual work with software tools. With automation, it is possible to reduce costs, time, waste, increase productivity, minimize failures and control, in real time, all business processes.

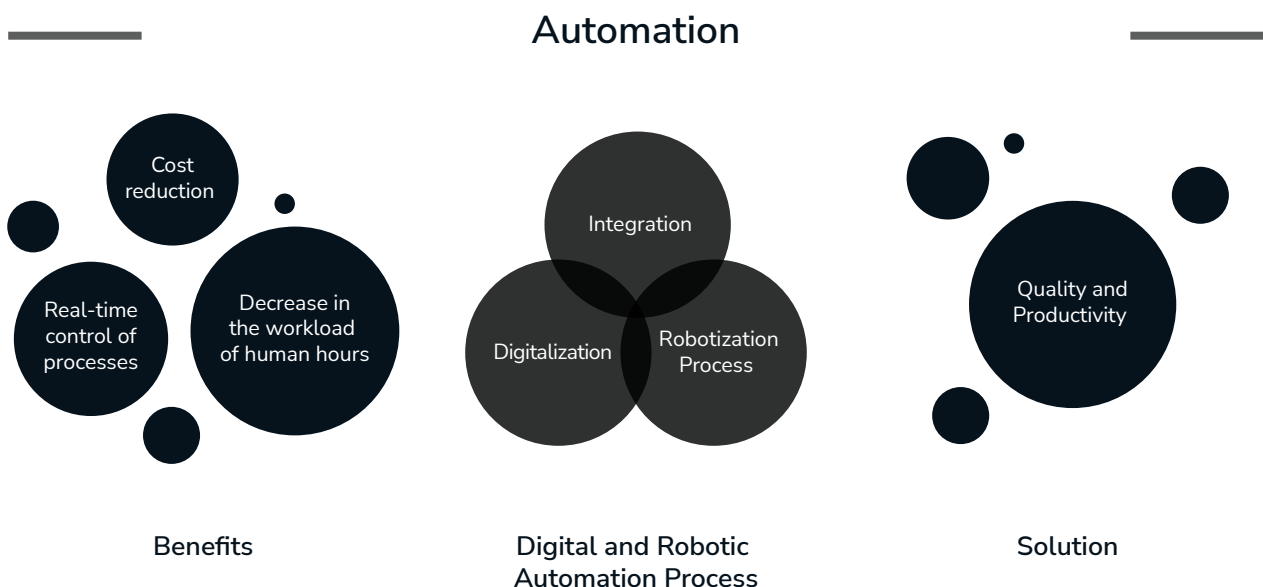
It is possible to replace manual activities with automated ones or to use software and systems to support different activities. A very important advantage is the feedback: It allows to evaluate, compare and make corrections in real time but leaving traces of execution.

PROCESS ROBOTIZATION

Robotic process automation consists of the systematization of repetitive processes through software that makes it possible for a “robot” to emulate and integrate the actions of human interaction in digital systems to execute a process. Robotization acts as assistants to human beings for routine or dangerous tasks and also for functions in which they are better equipped than humans, such as the analysis of volumes of information. The implementation of artificial technology is growing and in many companies it is already a reality. Thanks to robotic programming, it is possible for a robot to act with great precision and to know what it has to do autonomously.

These innovations allow the union of artificial vision and robots with which it is achieved that they can perform unthinkable tasks. The images are captured by a camera and then processed through specific artificial vision software. This process allows numerous applications such as measuring, identifying faults, guiding, verifying, among others.

In all organizations that seek to automatize their processes, all the concepts mentioned above must be integrated. The proper application of each one of them will make the effectiveness of the tasks that are executed in a production process increase and be faster and more efficient. Digitization seeks to manage faster and more practical documentary evidence through digital files, the automation process carries with it the search for all parts of an organization, especially its processes, to adapt to the digital age in a fluid and controlled and the use of robots should always be thought of as tools that help make the process more controlled, verified and measured. The sum of all the concepts should be seen as a macro-process called: **Digital and Robotic Automation Process.**



AREAS OF AUTOMATION

MARKETING

It is the use of software to carry out marketing actions in an automated way. Thanks to this, a company can carry out processes that would naturally be difficult and achieve more efficiency and results and greater control and monitoring of them. It allows developing complex marketing processes that, naturally, would be difficult or could not be done. It also makes it possible to automatically detect the records that are most prepared to receive a commercial offer, taking into account their profile and their behavior with the company. Investing in Marketing Automation makes it possible to increase sales and revenue, lower acquisition costs and improve customer retention. Some examples: The most basic form of Marketing Automation is autoresponders. What they basically do is automatically send a series of scheduled emails.

1. Welcome to subscribers.
2. Request an assessment or review.
3. Track visitors to your website.
4. Database cleaning.
5. Automatically segment a database.

SALES

Sales automation can be defined as a set of tools and methods that enable the automation of a number of sales business processes. Any organization in the finance sector and commercial teams can adopt this strategy and achieve excellent results, with a very significant impact on profitability.

Commercial automation guarantees changes and improvements, both in operational actions and in strategic planning, with greater speed and efficiency in various processes, such as business management, customer relations and decision-making. The benefits of automating certain sales processes are clear. One of the most obvious is that automation increases lead generation and the ability to build a relationship that ultimately leads to a purchase. Some examples:

1. Automated email sending in which the customer is notified that the product they were looking for, but had not been able to acquire because it was not in stock, has finally been replaced and can now be purchased.
2. Send personalized birthday greetings with a discount card.
3. Monitoring the performance of sales representatives.
4. Get smart reports on customer behavior.
5. Scheduling of meetings.

COSTUMER MANAGER

Its purpose is to limit manual actions so the flow of supply remains uninterrupted. It is an integrated tool that provides the appropriate functionalities for order processing, merchandise distribution and accounts receivable management. Its objective is to eliminate errors that may affect the invoicing of orders, the reception of products and generate dissatisfaction among customers.

Its main objective is the transformation of the customer experience, seeking the complete satisfaction of their needs in a timely manner, optimizing the resources allocated to the solution of their requirements. It enables multiple service channels for customers to communicate with agents and centralizes all data and information generated from all requirements. Some examples:

1. Provide order and application status.
2. Schedule appointments, services and deliveries.
3. Assistance for online purchases.

FINANCES

Consolidating the financial process is now a fundamental part of companies that are trying to adapt, where technological applications are increasingly essential. It refers to the use of software that allows the implementation of technologies to carry out financial tasks with greater precision.

Financial automation is a resource focused on making all accounting processes more effective. In addition, it can be used in all types of companies, because it can be adapted according to your needs. The tools that financial automation includes can offer many benefits for any company. These tools are even designed to more effectively manage the daily operations of the organization. Some examples:

1. Generation of powerful business reports: profit and loss statements, income statements, cash flow statements, payment performance reports, account reports, and tax and withholding reports.
2. Follow-up of the financial statements of the projects.
3. Administration of cost accounting
4. Self-service data display.
5. Analysis of data from financial management solutions.
6. Realization of cash flow forecasts.
7. Audit of revenue management and risk management.
8. Management of customer and supplier collections.
9. Keeps detailed records of all assets and liabilities.
10. Generation of budgets and planning.



HOW TO START WITH AUTOMATION IN YOUR ORGANIZATION?

Automation is all those tasks that are carried out without human intervention, and this can be managed and possible today. The process is designed by a person, the task is executed through a specialized software.

There is no use installing process automation software, migrating manual processes to software and waiting for robots to execute processes more efficiently, generating profits without any setbacks. The automation of processes must be considered as a trajectory, like a path to follow. By adopting this perspective, the current situation of the processes must be evaluated, seeking, first of all, to organize them, digitize them and, finally, automate them, using, or not, new technologies.

The more exhaustive and detailed the definition of the objectives that you want to achieve with process automation, the sooner it can be achieved in the process and the greater the probability that the project will be completed successfully. By automating tasks, the cost savings are visible, and the increase in productivity will increase. The steps to automate are:

Organization

The organization of the processes must be evaluated. This stage is essential for automation, because if we automate a bad process, the softwares will not be used, or even automation may not be feasible and bring costs instead of benefits.

The objective of the organization is to make the processes more efficient, effective and of higher quality, promoting improvements in workflows, involving above all the organization of the activities and tasks carried out.

Capture what you want to achieve

This stage will help to understand, not in detail, but in general, the scope of automating processes in the organization. Any technique can be used to assess the scope of automating processes, but the important thing is to keep it in mind even before executing the process.

- **Share the idea with all members of the organization**
- **Aim for proper profit management**
- **Reflect which are the well-defined areas of the project and those that are not entirely clear**

- Not entirely clear areas should have an overall framework drawn up by the client and implementer, with benchmarks that clearly indicate when project re-evaluation should happen. In this way, the scope of automation can be managed to the benefit of all parts of the organization.

- Digitization

Digitization ranges from the conversion of physical documents into digital documents, eliminating the need to transform physical information into digital information, to the structuring of the workflows that surround the processes. The Digitization of processes contemplates the structuring of digital workflows in which the process can be executed, from its origin to its conclusion, without the use of paper.

Automation

Automation at this time becomes a natural stage because, with the processes already organized and digitized, it is possible to obtain inputs in a structured manner in relation to the processes with the greatest potential for automation, these processes are those that adapt naturally to the use of digital tools more than others, despite the fact that what is sought is that most of the processes be automated. The costs of automating must be evaluated because very large expenses can be incurred, but it must be remembered that automating correctly will soon bring profits. Once the variables, profits and potential costs have been analyzed, the decision to automate the processes can be made objectively by evaluating the risks.



CONCLUSION

Automation in organizations that are dedicated to the creation, design and development of digital products must be seen as a tool that allows the link with the new era of the digital world. There are many myths about automation and the possible cause of the "fear" that exists for its application is that it is believed that it could displace human labor in various areas of the organization. Process automation is an important step in business management, capable of generating competitiveness, efficiency and value for the customer.

With the right tools, computerized process automation can be surprisingly easy and can offer significant benefits. Understanding these benefits and evaluating them with respect to the effort it may take to execute them will help to get a solid base to implement an automation project for the organization's processes. By implementing it, it is possible to eliminate errors, reduce costs and time by making activities more efficient, replacing manual work with software tools.

Automation should be seen as what is required to move forward and the need for its application stems from wanting to make processes run smoothly, comfortably, with the fewest possible errors and generate gains in both productivity quality. The goal of automation is to quickly and standardly manage the products and services that an organization offers to the public. Through process analysis and control, the goal is always to improve workflow so that errors can be corrected and strategic goals achieved. All processes can be automated, it is just a matter of analyzing them all and creating plans with clear goals and objectives that can integrate them all as a system so that the work of each one is a support for that of all and thus be able to channel efforts in the creation of a quality and efficient digital product, where the client's perception is that the final product is useful to cover their needs in a complete, fast and efficient way, thus bringing more orderly and effective processes to the organization without leaving objectivity behind, creativity and empathy of humans, because it is that touch that differentiates between different digital products on the market.

ABOUT THE AUTHORS

Since 2010, LEAWARE has been helping start-ups and already established companies build and develop their digital solutions, making them grow, boost their businesses, and succeed.

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