

**Meta Title:** Infowise | Best Practices of Business Process Automation

**Meta Description:** In this post, we'll talk about the best practices of business process automation. They are a set of techniques that produce superior results than alternatives.

## Best Practices of Business Process Automation

We discussed [four easy to implement process automation](#) in one of our previous posts and wrote a [guide to an effective business process automation](#) (BPA). In this post, we'll talk about the best practices of business process automation.

Best practices are a set of techniques and methods that produce superior results than the alternatives. Usually, best practices are used as the standard for business processes to increase efficiency. They help maintain quality and are based on benchmarking or self-assessment.

### Choose the Right Process

Your first instinct will naturally be to automate all processes in one go when you decide to implement BPA. You need to go against that instinct as it can be deadly for your business and automation efforts. If you are implementing BPA for the first time, then the chances are that you probably know very little about it and don't know how it will change your processes. That's why you need to choose a process that's lightweight or not mission-critical, like the [leave request system](#). This will provide you the ability to test the impact of process automation, identify any roadblocks and find solutions for those roadblocks.

### Choose the Right Solution

You can only achieve the desired results by properly laying the foundation of your initiatives. This is also true for business process automation and you can do that by choosing the right tool. There are several automation tools in the market claiming to be the best of all, but you don't need the best; you need the one that suits your organization perfectly. To find such a tool, you need to look at the scalability, customizability, adaptability, and of course, capability of the shortlisted tools.

### Define Automation Goals to Measure the ROI

Several organizations implement automation first, then see how it works and define goals accordingly. This is not considered the best practice as the right way to implement automation is to define the goals first, then implement automation to achieve those goals. Business transformation requires substantial resources, including time and money, so it's important to gauge the performance and make sure that you are getting the desired ROI. By defining goals in the beginning, you have the ability to pull the plug when you see that the automation is not working according to the goals you set, thereby saving your investment and preventing you from taking a big plunge.

### Establish Roles and Hierarchy

Once you implement automation, you'll see that the roles of the employees have changed and if you don't define user roles in the early stages, you'll encounter a lot of issues like buck-passing, deflection, scapegoating, etc. To prevent those issues, you must establish the role and responsibilities of every single person involved in the process. In order to enforce accountability, you must also identify the

process owner and create a transparent hierarchy. You must sit with the leaders, understand their current procedures and align the automated process accordingly. This best practice is the most important one as failure to establish roles and hierarchy almost always results in failure of a business process automation initiative.

## Involve Everyone in the Process

Automation is often met with active and passive resistance from the employees as it brings drastic change to an organization and many believe that it will put them out of their jobs. This can possibly cause your automation efforts to be useless and prevent them from embracing the new and improved process. To prevent this from happening, you need to involve everyone in the implementation of automated processes right from the beginning. You can conduct brainstorming sessions to pinpoint the pain points of the processes; not only will this help you find the right process, but it will also reinforce your team's sense of ownership.

## Invest in Training

Many organizations focus on the implementation of automation and forget about the training, which, in reality, determines the success of your automation initiatives. If your team doesn't embrace the automated processes and doesn't interact efficiently with the system, then it will definitely fail regardless of how good the system is. To prevent this, you need to train each employee to make sure that they know everything they need to know about the tool. To ensure the success of your training, you need to choose a platform that's intuitive and user-friendly and one that fosters self-learning. This will help you save a significant amount of resources that you'd have to spend on training if using a complicated automation system.

## Emphasize Continuous Improvement

Automating a process and then forgetting about it is not the right approach as it can reduce your ROI and chances of success. If you don't continuously monitor the results and tweak the system accordingly, then you will fail to improve the efficiency of your business processes. You can put the process owner in charge of continuously gauging the performance and amending the automation system to get the best results possible. Advanced automated systems offer real-time key performance indicators (KPI) that can help you monitor and improve the system as you go.

## Chalk-Out a Back-up Plan

There's no doubt about the fact that automation technology is great; however, it is not without fault. Like every other technology, there are chances of technical glitches that can halt your processes. As a business owner, you wouldn't want that to happen; that's why you need to have a back-up plan for when the system fails. Usually, you'd need human interaction to override the system in such instances. Another way to prevent this from happening to you is by choosing a human-centric system that requires human observation but eliminates repetitive, mind-numbing processes.

## Takeaway

By implementing the aforementioned business practices, you can become more competitive, develop new markets, increase sales, increase efficiency, reduce costs and waste, improve workforce skills and quality, and easily adjust to change.

If you are looking to apply these best practices and want to choose an automation system, then [contact Infowise](#). We have been providing SharePoint and Office 365-based automation solutions for nearly two decades. Our solutions are easy to deploy and don't require substantial training and resources. We can even help you customize and up-scale the solution according to your needs. You can even [request a free demo of our solution or download a free trial](#).