

Automating workflow

How an employer can increase productivity with business workflow automation **Interviewed by Jayne Gest**

As the economy has encouraged more than a few business owners to tighten budgets and search for inefficiencies, workflow automation is enabling companies to do the same amount of work with fewer people.

“We’re looking out for your bottom line because we take these inefficiencies and wrap them in automation to not only reduce overhead and cost, but also let you spend more time worrying about generating new revenue rather than the loss of revenue,” says Curtis Verhoff, systems integrations and applications manager with Blue Technologies.

Smart Business spoke with Verhoff about how business workflow automation could make sense for your organization.

How does business workflow automation work?

Employers can introduce efficiencies by looking at business processes and putting in various solutions — often a combination of hardware and software — that allow them to automate workflows for areas such as shipping and receiving, accounts payable, accounts receivable and human resources.

Business workflow automation is more than just taking physical documents and data and digitizing them so employees can view them quickly. It involves installing software with rules, actions and notifications that help employees more easily and quickly process documents and information within the organization. For example, the hiring process is growing more complex with numerous steps to be completed such testing or certifications. Automated workflows can help employees keep track of all steps and automatically initiate the next one; the workflow solution informs people when tasks have been completed, what is outstanding and what requires immediate attention.

What advantages does workflow automation bring and how are those magnified in a tough economy?

Workflow automation allows all the players in your department or business to be more productive. Along with doing more with fewer people, workflow automation is a time saver as tasks can be completed quicker. With accounts payable, for instance, the workflow automation enables the invoice to automatically enter the system by calling on various employees to look at it, approve it or move it on without a lot of handholding.



Curtis Verhoff

Systems integrations and applications manager
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The system can be set up for different levels of approval based on the monetary amount, and a series of checks and balances would require validation before payment is made.

This type of automation has become especially important as companies in the last four or five years — particularly in Ohio — have taken a hit as far as jobs. Businesses have had to find ways to keep up with the workload with fewer people. Employers are battling with keeping their level of production, satisfaction and customer service at the same level or higher with fewer resources.

Employers also are drawn to the technology because they are skeptical about the current economy and where it’s going. It’s often easier to look at software automation to help the existing staff keep up with the work level, as well as grow it, rather than hire additional people who might not be needed next year.

What departments and industries are using workflow automation the most?

Some of the biggest uses are for accounts payable and accounts receivable, as well as in the industries of law and education. However, automation works across a wide range of industries, as just about every company is working with information and documents to

some degree. The automation solution can be tailored to fit from a small volume of information and documents to a large amount.

It’s important to keep an open mind because, in some cases, automation has a role that isn’t immediately obvious. In addition, the systems are flexible enough that many times they can be adapted to other inefficiencies you may find later.

How does an employer decide if it needs to consider workflow processes?

If not enough time or attention seems to be available; if you’re not able to service your current customer base; or if you see customer service levels decrease, those are some serious red flags. If inefficiencies are coming out of the woodwork, unlike in the past, the first solution might not be to hire another employee.

With the help of technology experts, you can uncover your internal challenges and current deficiencies by processing business documents or data. Those experts can spend time with you to discover what your business does and how it does it to determine what level of impact the automation would have for your organization. In a few cases, the cost might not justify itself because the inefficiencies or deficiencies don’t equate to much.

Once you’ve installed the workflow automation, what is the best way to overcome the challenge of training and employee buy-in?

There are a couple of tactics, but the most successful is to choose an employee to be extensively trained in the software and put him or her in charge of that initiative. It gives a company control and flexibility because it has someone internally who knows the solution very well and can train or retrain employees at his or her own discretion and timetable.

In addition, if the trainer is within the organization, employees take greater strides in learning the system and using it on a daily basis. You have a faster response with problems when the trainer can help another employee immediately. You’re putting skin in the game to have the employee making sure everybody is properly trained and utilizing the system to the nth degree.<<

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