

A rising trend

How automation can aid cost recovery in your business

INTERVIEWED BY JAYNE GEST

Organizations are showing more and more interest in automating day-to-day tasks and activities, whether it's in sales, customer service, human resources, accounting or administration, says Curtis Verhoff, advanced solutions manager at Blue Technologies.

“While automation isn't a new concept, customers — both current and new — are bringing up the idea first,” he says. “Rather than technology providers pushing companies toward automating tasks and processes, businesses are providing the momentum.”

Content today often comes in via email through electronic forms, rather than paper, from customers, prospects, vendors, clients, etc. Organizations are exploring technology solutions that can not only capture the data easily, but also integrate it with the existing systems to expedite their processing. A nonprofit, for example, with low staff numbers but a high need to stay connected to donors, may find these technologies very beneficial.

Smart Business spoke with Verhoff about implementing automation in your organization.

What kinds of technology can add automation to daily operations?

There are several dozen workflow automation data capturing solutions that can be added to an employer's existing business technology.

This middleware is software that lies between two systems, such as Microsoft Office 365 and a business management software like SAP, to make it easier to communicate and

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manage data. With help from a technology provider, organizational leaders can determine which technology fits best to streamline and/or automate processes.

For instance, a health care facility had 40 different fax lines where the information came in; so many channels to so many different people created bottlenecks and inefficiencies. Under the right technology plan, the organization was able to consolidate down to 15 fax numbers and add software that looked at the information on those incoming faxes and automatically redirected it to the appropriate team under consistent logic and rules. The solution saved both hard and soft costs.

In another scenario, rather than have CPAs in an accounting department doing low-level jobs, one company added a technology solution to monitor incoming emails and documents through a centralized accounts payable group email box. Then, the employees just have to validate the information that's automatically loaded and send it in the right direction.

Does this software require a big budget to implement?

Up to this point, many automation tools were expensive and mostly

utilized at the large enterprise level. However, middleware solutions that can help organizations automate day-to-day tasks are now very cost affordable for all sized companies. It is a good idea, though, to spend the resources upfront to ensure the right solution is chosen and the relevant employees are thoroughly trained.

How can employers get started with automation?

The first step is understanding all processes that are being utilized by the organization. Talk to the employees who undertake these tasks every day to learn the standard operating procedures in detail and identify bottlenecks or inefficiencies.

Once this is mapped out in as much detail as possible, it's easier to determine at what points manual steps can be replaced with technology. Each scenario differs and requires a custom approach to maximize the ROI when technology is implemented at the team or department level.

The right technology will save time and reduce potential mistakes that can be costly. It will minimize manual labor and free up your employees to do more important things for the organization. ●