How Automation Can Streamline Your Workflow

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SOLVE BUSINESS ISSUES WITH SOFTWARE

Being a small business owner is challenging: You must manage the business processes to identify and solve real business growth issues in a fast-paced, high-stress work environment. But if you're honest with yourself, many areas of business must be managed simultaneously, and you likely have limited time and employees to help you manage it all. Directly related to your financial success is the ability to develop and implement work processes that, through automation, can be proactively managed.

These work processes include maintaining and tracking customer service, human resources, resource allocation, litigation protection, and billing issues. With service businesses, processes include managing time such as employee time, project time, and installation time. Automation reduces the human factor for mistakes and catches the overlooked factors that might affect customer service, costing you time, money, and clients.

As part of any software selection process, the human factor must play a part. This could either be the human process within your business or your customers. When it comes to the customer, as a service business, you must understand that customer experience and satisfaction are not the same things; however, they are intimately related. Why is this important? Because how you operate is going to dictate the customer experience. You have to be in tune with the customers' needs

from their perspective. You must know how selecting your software will improve their experience. Otherwise, the business processes are going to frustrate and hamper those needs, creating a negative customer experience.

Making software valuable to customers is done by learning how they need their business to interface with the software, and how their customers interface with the service provider. According to zoovu.com, the following are some key points that you can use to make sure that you are providing the customer experience you want.

Accessibility

As a service business, accessibility is vital. If your customers cannot get in touch with you, or their requests are not being

completed promptly, then you are creating barriers for them while they are trying to run and manage their business. This would create friction and show a lack of accessibility.

Navigation

Not only is the human workflow essential, but the software workflow is also critical to the success of the software. The software should be straightforward and walk you through what fields need input to provide you with the output you expect and need to make data-driven workflow and customer service decisions. If it is difficult, your customers won't want to use it. Furthermore, the missing or incomplete data will create data gaps. Business management software is different from a simple help desk solution. It requires more data to perform trending, business load calculations, productivity measurements, and litigation protections through data collection and proof of service. These factors can be complicated for some internal staff to understand; however, it depends on your goals. Do you want to identify underlying issues so proper budgeting can focus on real issues, or do you want to know you had a problem?

Memory

Harvard Business Review named repetition as one of the most frustrating things customers complain about when it comes to service-based businesses. Having to repeat or redo troubleshooting or conversations to support their requests is a common complaint from customers. Customers expect that information and communication regarding their issues, problems, or interactions are to follow them until they are resolved. They don't want to be asked the same questions time and time again.

This is where the human factor interferes with customer service and experience. The data in any system is only as good as the data being input by a human.

Convenience

There are many factors to convenience — internal convenience and customer convenience. Internal convenience is how quickly your employees can move between software sections, how fast the data can be displayed and the overall ease of moving through the system. Externally, the factors don't change much; customers want access to their data, your products, and ultimately the ease of use and data retrieval. There are a lot of subcategories of convenience; here are a few:

» Decision convenience — How quickly can a customer decide what information they need, or what products they need access to? Consider a generic integrated barcode system to track inventory and assets.

» Access convenience — How easy is it to access information within the software, and how robust are its search capabilities? An integrated bar code system can quickly pull up purchase information, warranty information, user information, pictures, and specifications.

» Benefits convenience — Being able to display and use the core benefits of the software and work processes within the software are parts of the benefits convenience. Examples of works processes include escalation processes, updates, order information, customer information, documents, parts and inventory, human resources, email notifications, billing information, time, and attendance.

» Transaction convenience — Transaction convenience can mean many things to many different businesses. In the service business, it is typically about tracking time against a contract to ensure that the customer is receiving value and measuring the profitability of your business. Transaction convenience also provides a legal record and tracking of activities. You, as the provider, can then prove what, who, and when you provided the service, parts or other products.

» Post-benefit convenience — What happens after the service or project is completed, and how are you handling issues after the initial interaction and service? Polling customers on how they feel about your service is one way to gauge your service.

Defining a workflow process can be challenging. Identifying a workflow is the documentation of a series of activities or tasks that must be done in a specific order to achieve a business-based outcome.

Suppose you see people using Excel spreadsheets, Google Sheets, or some other product unrelated to your company's business management software. In that case, you might discuss the reason they are not using your software for that process. Google Sheets and Excel spreadsheets are what I call disassociated data; it is valuable data, but only to those who possess the data. It can't be used for internal or external trending or business decision making on a global basis.

Also, you will likely have employees recreating the same data and processes because of the gap of knowledge between those who have access to specific data, those who don't, and those who need it. According to integrify.com, these are other benefits of automating workflow and process development:

» Streamlining and expediting internal workflow by reducing double or triple entry and data availability

» Tracking request status in real-time

» Trending models, both internally and externally, over a period of time

» Eliminating or combining process redundancies

» Parallel processing of task and data entry

» Enforces corporate work processes and organizational rules

» The ability to alert and manage tasks

» 24/7 access to data and monitoring for escalation requirements, missed tasks, or delays in service requests

» Reduce licensing overhead, utilizing one integrated business management software (enterprise resource planning, customer relationship management)

» Reduce entry errors and rework created by the human factor

Developing good, solid workflow and work processes can be critical to your long-term success and customer satisfaction. People like to know what to expect and the issues that might arise from the project or service you are providing. Internally, work processes can help your employees work through the day-to-day issues, and it refines and improves the overall efficiency of the process the more people use it.

Not having well-defined and enforceable work processes can lead to some of the following issues:

» Customer complaints about the quality of the product or service provided.

» Employees, vendors, and subcontractors get frustrated because of unreasonable delays or mistakes.

» Duplicated work, repeated troubleshooting processes, redundant conversations about the same issue, or the issue never being resolved.

» Unforeseen cost increases, either in the product or the labor.

» Wasted resources, parts, or equipment that were purchased and not used. Also, return and changes in employees.

» Missed deadlines without knowledge or communication.

Over the last two decades, I have been passionate and uncompromising that using data-driven trending models can help you grow your business, avoid human errors, identify real business issues, increase productivity through workflow and work process management, reduce billing mistakes, and provide a better customer experience.

Since the software is managing the business process, not the people of the business, it reduces onboarding costs and training costs because the software puts the human into an automated workflow versus the human driving the workflow.

About the Author

Scott Lewis is the president and CEO of Winning Technologies Group of Companies, including Liberty One Software. Lewis has more than 38 years of experience in the technology industry, managing systems as small as a few users and as large as thousands of users. Lewis is a nationally recognized speaker and author on technology subjects. He has designed thousands of systems and worked with businesses to empower them to use technology to improve work processes, increase productivity, and reduce costs.

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