

Identifying Processes for Automation

Overview

Below is a list of criteria that typically indicates if a process is well suited to automation using SolveXia. Note, the list below is not exhaustive and not all criteria need to be satisfied in order to represent a process that could benefit from automation (for example, the high cost of error alone could be reason enough to automate).

Criteria

1. Take a non-trivial amount of “hands on”, manual time to complete – typically more than a couple of hours per month.
2. Are run frequently – typically at least monthly or more frequently.
3. Are made up of 10 or more steps. A step in this context refers to an “action” that a human operator would think of as a discrete thing needs to be done – for example “copy the non-zero values from column F to column T”.
4. Work with multiple data files – typically in Excel, Microsoft Access or text/flat file formats – as inputs, outputs or as interim files.
5. Work with data from multiple legacy systems.
6. Have a high cost of error – either in real or perceived terms. For example, if the process produces values that are reported to a regulatory agency, executive management or in a public forum where errors may result in brand damage.
7. Contain information that is of interest to internal or external auditors and there is a need to maintain an audit trail.
8. Involve significant key person dependency risk with the details of the process known only to a small number of individuals in the organisation.
9. Need up-to-date documentation that represents a process. This may be focused on increasing the transparency of the current process so that it can be understood – and run – by others.
10. Face a high risk of human error due to complexity or the number of steps in the process.
11. Are currently being performed by legacy software that has become a “black box” or is expensive to maintain, update or replace through traditional IT development.