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Manager's Guide: Increase Speed and Quality Across Your Organization With Automated Workflows

Are you familiar with all of the workflows in your organization that should be automated? This guide will help you identify the day-to-day routines that will provide you with the best benefits when they are automated. We hope you find this information rewarding.



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Interviewed experts and clients who use automation:



Kimmo Pyhäjärvi
Development Director
CGI



Ari Paulin
Project Manager
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Mikko Kaasinen
Director, Robotic Process
Automation
CGI



Teemu Laakso
Director, Blood Service
Finnish Red Cross

Will workflow automation benefit my organization?

Every organization has a number of routines—things that are always done the same way, day after day. These tasks are often so ordinary that you don't even think about them in connection with workflow automation. Typical examples include transferring data between systems, and customer service tasks performed by different employees. These tasks take just a couple of minutes at a time, and their cumulative effect goes unnoticed.

“ People have become accustomed to routine tasks and often don't even think of questioning them. Those who have noticed problems often think that automation is expensive and involves introducing and learning about new systems. However, this doesn't have to be the case. Automation can start small and be expanded as its benefits are noted in everyday life. ”

– Ari Paulin, Project Manager, CGI

“ If certain consecutive routine tasks are repeated day after day, year in, year out, they should be automated into a streamlined workflow. ”



The information in this guide will help you identify tasks in your organization that you can automate to achieve the best business benefits. By starting with these, you can be sure that you are making an investment that will quickly pay for itself.

You will be guided by CGI's experienced automation and software robotics experts, and a peer perspective is provided by the Finnish Red Cross Blood Service, which has achieved many benefits through automation on a step-by-step basis (page 5).

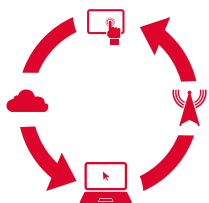
“ It is important for managers to identify the key functions of their company that can be handled by automation. The most important benefit of automation is the savings in time and money, and the fact that personnel working hours can be dedicated to productive or worthwhile work instead of routines. ”

– Kimmo Pyhäjärvi, Development Director, CGI

Towards an efficient workflow through automation and robotics

TERMS EXPLAINED

WORKFLOW



Workflow

At its most efficient, a workflow is developed from a combination of people, automation and robotics, with the workflow chain organized in a thoughtful manner. A single operation starts the chain without manual routines or work stopping it.

An efficient workflow eliminates unnecessary bottlenecks from the organization's processes.

AUTOMATION

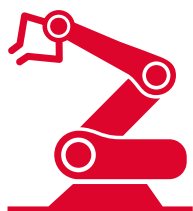


Application automation

Application automation allows individual systems to bypass manual operations and speed up work. Application automation makes it easy to take shortcuts around unnecessary manual workflows.

Application automation eliminates routines within a system or program and speeds up work carried out in the system.

ROBOTICS



Robotics

Robotics is used to implement some of the same things as application automation. In addition to automating the functions of individual systems, robotics can be used to connect different systems to each other or streamline the phases carried out by the systems and people into an unbroken chain. For example, robotics may perform a work procedure that was previously carried out manually.

Robotics eliminates routines, especially from sets of multiple systems and, if necessary, work procedures conducted outside the systems.

Finnish Red Cross Blood Service: Driving workflow consistency and efficiency



Teemu Laakso,
Finnish Red Cross Blood
Service

The Finnish Red Cross Blood Service has used CGI's Rondo service to automate purchase invoice processing and contract archiving for several years. In addition, through Rondo, it has found a solution for automated documentation of stakeholder messages and documents.

"In the past, information from different stakeholders and authorities was hidden all over the place in folders or e-mail messages of individual persons," said Teemu Laakso, Development Director for the Finnish Red Cross Blood Service. "The decision-making chain was not transparent. In our work, we occasionally need to return to these documents and, before automated documentation, this took up a lot of time."

The blood service decided to develop workflows to harmonize data flows, facilitate information finding and improve traceability. The newly automated processes save a great deal of time. For example, messages that were previously reviewed manually

are systematically picked up by automation. With this change, the information is in the same location in electronic form and can be easily found. Resolving an individual matter is now faster with fewer gaps – and all information is available to the entire organization.

Workflow automation is a small investment that the organization will benefit from every day.

"The small investment we made in the automation of workflows will definitely pay for itself," said Laakso. We also have identified more similar workflows that we can develop in the future. Cooperation with CGI continues!"

“ Developing workflows and making them electronic makes us more consistent and efficient. It allows us to cooperate more closely with the authorities, for example. ”

– Teemu Laakso, Finnish Red Cross Blood Service

Did you know that you don't always have to start planning from scratch?

CGI Rondo includes solutions for practically any workflow. It also offers specialized services with proven, customizable tools that will meet your needs both today and tomorrow. Each solution can be implemented gradually, using a concept suitable for your business. If you already are using Rondo, consider expanding the service to automate other operations and increase your organization's benefits.

Learn more: cgi.com/rondo-workflow-automation

Teemu Laakso's tips for automating workflows

1. Brainstorm

What new and recurring tasks could be automated?
What are our needs? Identify a concrete development target that will deliver genuine benefits.



2. Clarify the objective

Once the target has been selected, carefully consider the benefits to be achieved. What exactly are we doing? What do we want to achieve?



3. Ensure feasibility

Ensure automation serves everyday routines and practices, and automation processes are smooth. In addition, include your IT partner in improving practical work with automation.



How to identify operations for workflow enhancement

Workflow automation can be used for all tasks involving steps that are consistently repeated. The automation process can start when a customer confirms an order, a resident reports a lost key or a project manager marks a task ready for invoicing.

The advantages are speed, clarity and accuracy. Take, for example, a resident's lost key. With automation, the order is immediately visible as an open task on the project manager's project map. The caretaker closest to the resident can be found in seconds, and sending an invoice for services to the customer does not depend on the memory or schedule of the project manager.

In most cases, the worst causes of wasted time and poor quality lie deep within the operations of different functions and are not directly visible to management. In this section, find steps to follow in automating processes and tips to consider.



“ Automation projects always start out by identifying the recurring tasks that can be automated to achieve the best business benefits. Automation is used to increase the efficiency of operations and improve customer and job satisfaction. ”

– Mikko Kaasinen, Director, Robotic Process Automation, CGI

1 Identify your situation - Initial assessment



Your organization has many internal, routine operations that result in long workflows. Personnel should be working on more worthwhile tasks, but there isn't time.



When serving a customer, operations require manual steps from different people, which slows down the service. Customer service needs to be improved.



The information arriving at your business is hidden in folders and in the email messages of individuals. It is difficult to find and track.

2 Select your goals



Increased efficiencies



Smoother service



Information traceability

3 Select the means for achieving your goals



With automation, routine tasks are eliminated or quickly bypassed.



Automation enables workflow chains to be combined, resulting in faster customer service. The chained steps are handled electronically.



Information is collected systematically in one location and is available to the entire organization.

4 Experience the benefits



Errors are reduced, accuracy is improved and the quality of work is consistent. Your staff can focus on more strategic tasks, and their work is more motivating.



Customer service is faster, easier to track and higher in quality, resulting in improved customer satisfaction.



Information is easy to find and report, and management can also easily check the quality of operations.



Identify important operations in your organization

- ? Where is information transferred manually from one system to another? Where is this work done the most?
- ? What work procedures take a disproportionately long time?
- ? What workflow might come to a halt due to the absence of a certain individual(s)?
- ? What process has the highest occurrence of human error?

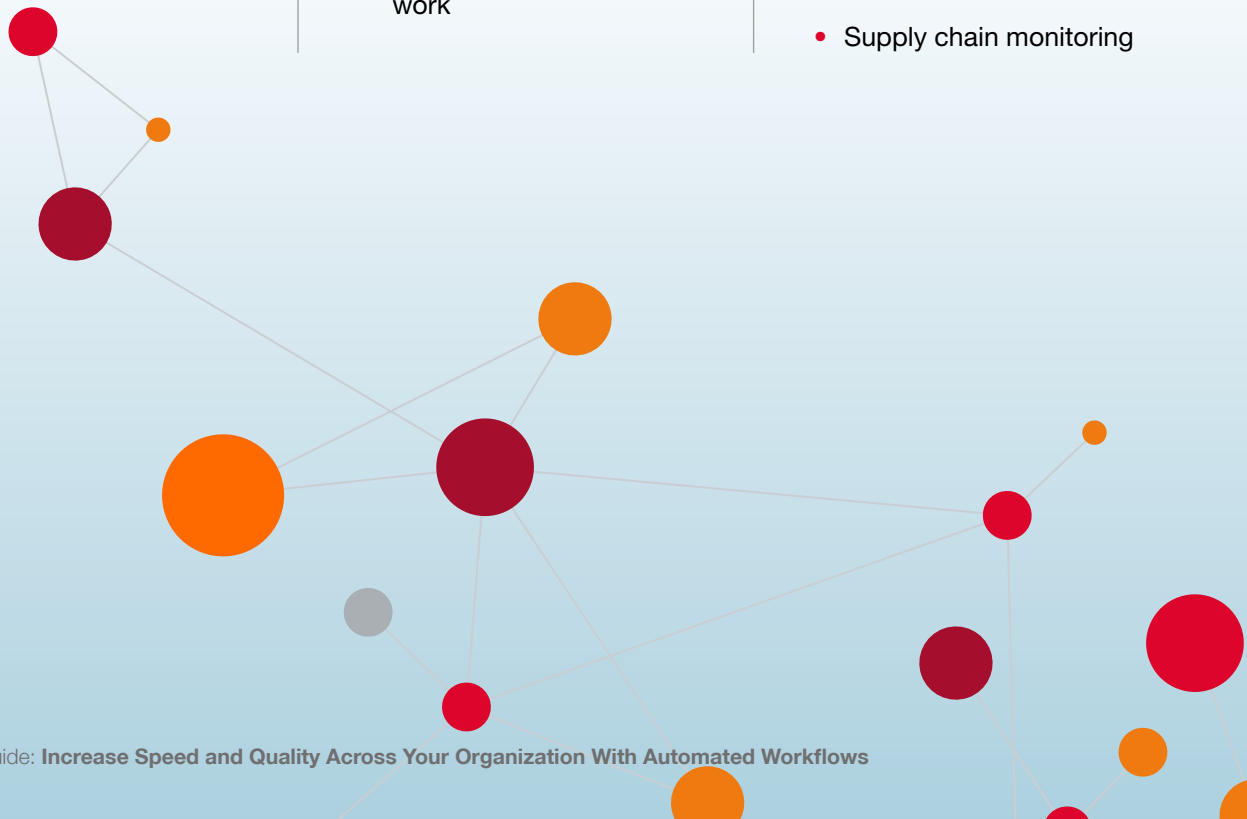
- ? Where does a slow or unclear transfer of information cause delays?
- ? What gives rise to the most complaints or customer dissatisfaction?
- ? Do customers complain about slowness?
- ? What workflow involves multiple systems or parties?

- ? Is any workflow physically decentralized?
- ? Where are the delays in obtaining confirmations or data retrieval?
- ? What workflow has phases for which insufficient information is provided?



Workflows that are ideal for automation

- Various financial administration workflows (e.g., invoice processing)
- HR processes
- Documentation and contract processes
- Phases following face-to-face sales
- Work supervision in service work
- Application processing
- Merging information from different systems
- Customer data management
- Supply chain monitoring



Get started easily.

CGI Rondo enables you to easily automate different processes. If you already are using Rondo—for example, to automate financial administration workflows—unlock its full potential by automating other workflows, such as documentation, account opening or employee onboarding. If you are not yet a Rondo user, we would be delighted to help you with planning and implementation.

Read more: cgi.com/rondo-workflow-automation

Contact us. Let's identify tasks within your organization that can be automated.



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