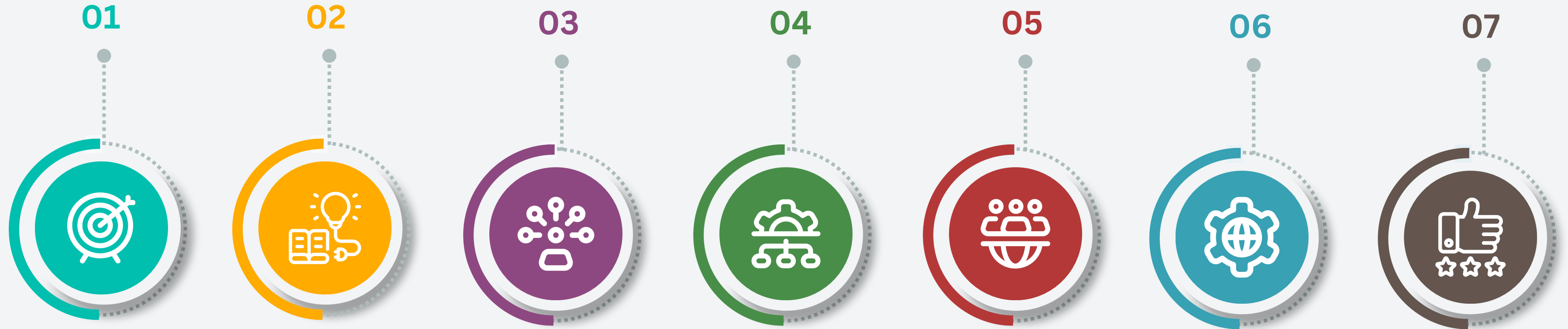


7 Steps in Getting Ready to Automate Your Business

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Seven Questions To Ask Yourself Before Automating Your Business



01 What is your business goal?

- Defining business goals is crucial before automating any process.
- Clear understanding of the desired outcome of automation is important.
- Goals can vary, such as increasing efficiency, reducing costs, or improving customer satisfaction.

02 Can others repeat this process?

- Automation is best for tasks with clear rules.
- Human-dependent processes are not suitable for automation
- Note that assessing these factors can help determine if automation is appropriate.

03 Plan your time accordingly.

- The workload should be considered before deciding to automate.
- If the workload is small, manual handling may be the most efficient
- The workload involved in a process should be considered before deciding to automate.

04 Do you have the right tools in place?

- Automation needs: finances, time, technology and skilled personnel.
- Assess before automating: enough resources for implementation
- Resource check before automation: finances, time, tech, skills for success

05 Be prepared for the unexpected.

- The benefits of automation must be balanced with potential risks.
- Workflow concerns should be assessed beforehand.
- Mitigate risks before implementing automation for optimal results

06 Make sure that you are in the group that makes the decisions.

- Employee involvement is crucial in automation decisions.
- Valuable insights and challenges can be contributed
- Collaborate with employees for effective automation implementation.

07 Work in tandem until testing is done.

- Consider the impact on support and accessibility.
- Improve the experience while keeping everyone happy
- Identify lessons learned and make strategic adjustments for the next quarter.

**WELL IF YOU HAVE A FEW QUESTIONS ANSWERED
AND HAVE A FEW MORE...**

Book a call with us at meetwithtba.com

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