Preparing your processes for automation

A one-day workshop to learn how to choose the right process, map it, improve it and prepare it before automating it. Hands-on: a case study, then your own process.

One day | On site or remote | 12 to 16 people | Beginner level | Certificate given

Who it is for

Analysts, consultants, managers and the people who do the work every day: a mixed, beginner-level audience that wants to prepare its processes before investing in automation.

Prerequisite

None. Just come with a process from your daily work in mind.

Description

Automation amplifies what already exists: on a broken process, it only speeds up the mess. This day gives you a method to choose the right processes, map them as they really are, remove what adds nothing, check the data and prepare the team, before automating.

A single case study, supplier invoice processing, runs through the day: four guided exercises, two short workshops and a closing team workshop, in groups of three or four. Each participant then applies the method to their own process.

Objectives

By the end of the training, you will be able to:

- ✓ Tell the families of automation apart and choose the right one
- ✓ Map a real process, with its measurements and exceptions
- ✓ Assess data quality and the integration approach
- ✓ Select a process with a weighted grid and estimate its return on investment
- ✓ Spot waste and improve before automating
- ✓ Set out the roles, change management and controls

Program

Six modules over one day, each given the time it needs.

1	2	3	4	5	6

1 Fundamentals 1 h
The families of automation, and which one to choose.

2 Identify and prioritize 1 h 45
Weighted grid and return on investment.

3 Map 1 h
From scoping to a measured map.

4 Improve 1 h 15
Waste, main path, error-proofing.

5 Data and systems 45 min
Quality, structure, integration methods.

6 Governance and change 25 min
Roles, controls, adoption.

What you take away

The participant workbook

The weighted grid, ready to reuse

Your preparation sheet, on your process

Your action plan

A training certificate

Terms

Format
On site or remote, for your organization

Group
12 to 16 people

Schedule
One day, 9 a.m. to 5 p.m.

Price
On request, depending on group size

Dates
Set with you

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