

Drive Value in Operations: Your Pitfall Checklist for Automation Projects

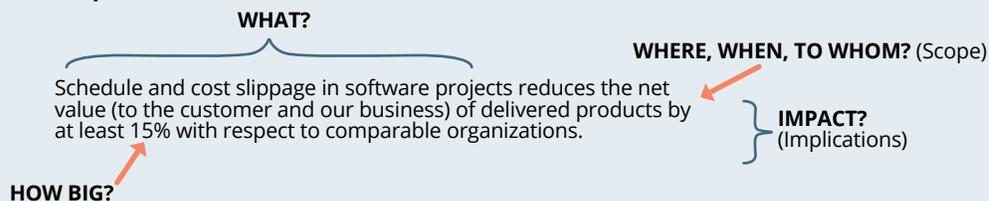
Did You...

- Align to value? Consider not only cost, but also cycle time (speed and throughput), quality and accuracy (and associated rework), capacity and experience.
- Verify the efficacy of the underlying process (whether workflow, decision or data processing)?
- Characterize the automation candidate's complexity, including process branching, complex decisions, interfaces and handoffs, and upstream/downstream interdependencies?
- Design a solution that is reasonably robust to anticipated business change?
- Select automation technology appropriate for the situation?
- Address "WIIFM" (what's in it for me) for users and plan for organizational change management?

4 BONUS TIPS

1. FAST Goals® can help you align and prioritize. Check out this [FAST Goals® Insight](#) for an overview.
2. A good problem statement is crucial to ensuring value and efficacy of solutions (process & tech) to operations challenges. It answers these questions and sets the stage for goal-setting:
 - What is the problem? (weakness, gap, shortfall, issue)
 - A simple technique to ensure you have root cause, not direct cause or symptom, is the "5 Whys."
 - [Contact us](#) for a Root Cause tip sheet.
 - Where and/or when is it happening? To whom? (scope)
 - How big is the problem? How do we measure it?
 - What are the implications?
 - What is not within scope?

For Example:



3. While it is sometimes useful to get a small win to gain momentum (i.e., one small automation in place), be sure that even the small wins provide meaningful value.
4. When using automation to reduce rework, consider these two layers:
 - The root problem driving the rework: If it is a repeat problem, automate at the source.
 - The rework itself: Look within the rework steps to find repetitive actions. For instance, reworking claims audit issues entail data queries. Automation can be added to speed up and improve the accuracy of the queries.