



# 6 WAYS TO DIGITAL TRANSFORMATION

Breaking Through Common Roadblocks to Automation



Enterprises and centers of excellence are under near-constant pressure to accelerate growth, efficiency, and ROI. And while large-scale digital transformation is widely held as the key to achieving these goals, a majority of companies come up short by not anticipating potential roadblocks. **The most challenging overarching obstacle: the lack of detailed knowledge on current state operations.** This checklist walks you through the common roadblocks to automation success.

## DOES YOUR PLAN INCLUDE THESE SIX STRATEGIES?

### 01

#### **Make sure you have enough resources.**

Do you find yourself with limited resources that get in the way of achieving your goals? While automation is clearly delivering tangible benefits, previously ingrained issues can strain your resources and result in backlogs, missed deadlines, and disappointed stakeholders.

In terms of resources, it's helpful if the company can provide a business analyst. That person can help identify the areas for conducting initial process discovery and researching automation potential—once processes and tasks have been documented. They can also help build a roadmap for success by outlining a strategy for RPA implementation and communicating this back to stakeholders.

## 02

### **Keep key stakeholders current.**

Properly executing an automation program requires successfully communicating with many stakeholders, but this doesn't always happen. The even trickier part is that each group typically requires unique information, making it a time-consuming endeavor. But the effort is well worth it as communication paves the way for stakeholder buy-in, helps your organization keep to set timelines, and more.

One thing to note: often stakeholders are not well versed in the various types of automation technologies, and what may work best for the business. By getting early stakeholder buy-in, you can determine at the outset the education level of all participants and know if you will need to provide education on the technology as well.

## 03

### **Understand what causes cost overruns.**

When your business finds itself relying on outside consultants—coupled with the fact that automation by its very nature can take a fair amount of time to implement—costs can soar quickly and sometimes do so unchecked. Keeping a better handle on costs and what's going over budget, which can be achieved in part by handling more of the project in-house, will help you stay on track.

## 04

### **Remember the human factor.**

Change management and organizational development are critical to the program's success, but most enterprise automation projects are quite challenging. It requires human involvement and judgment all along the path toward automation. A key element of that human component is excellent communication. Once automation is in place, which by definition means the process has changed, likely there will be a need to train the team. Bear this in mind as you map out a project plan and adhere to timelines.

## □ 05

### Beware the incomplete starting point.

Systems and applications can be easy, but an accurate and complete view of the processes and tasks being executed across them can be nonexistent—and ultimately undiscoverable—with traditional process discovery methods.

## □ 06

### Rely on tribal knowledge, but not exclusively.

Uncovering all the major actions and decision points within a larger business process requires intense investigation of “tribal knowledge.” And while you should listen closely to the users, you’ll also want to verify what they are saying. **Quite often, the squeaky wheel does in fact get the grease when it comes to RPA/automation.**

While one department may be clamoring for automation, that may not be the best area to start or implement next in the organization. That’s when a tool like FortressIQ’s process discovery solution can be used across several areas of the business to determine the best timing for implementation, especially at enterprise scale.

Bearing these six strategies in mind can lead to better discovery of the details around current state operations and ultimately smoother digital transformation. An automated, highly-efficient future awaits organizations that successfully navigate the roadblocks and get to the other side.



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