

How to guide

Grow your business and deliver **operational excellence with automation and AI**

The case for using technology to deliver operational excellence is clear. Many business owners are keen to do so... but where do you start? We've compiled this "how to" guide to provide just that. A starting point.

When it comes to implementing automation and AI (Artificial Intelligence) tools in your business, there's no one-size-fits-all set of tactics. And while AI-enabled ERP software is still very much in its infancy, automation tools in current ERP solutions are just getting better and better. They're now capable of analysing large amounts of data and making predictions.

Our guide therefore begins with a question and helps you unlock the unique answers and insights in your organisation.

The question:

How can automation act as a key enabler for operational excellence in your company today?

Follow the steps below to see how automation could help you deliver the operational excellence you want your company to be known for.

1.

Understand your future trading environment

On the one hand, this step might seem impossible. How can you know what the future holds right now in the present?

On the other hand, the signs are already apparent that industries across the commerce spectrum are experiencing significant disruption. And planning for a future trading environment unlike the one you operate in today is a highly challenging experience.

Headwinds are facing every type of business with new entrants and existing competitors being forced to do things in new ways or diversify their business entirely.

Here's your opportunity to start mapping out the changes your customers are moving towards – and beginning to accept. New entrants do things quicker, sometimes better and often cheaper. They've been able to disrupt your industry, in whole or part of, because of the advantages technological developments have brought with them. And those who embrace change and adapt accordingly can also drive disruption.

'It is not the strongest of the species that survive, nor the most intelligent, but the one most responsive to change.'

– Charles Darwin

Now, we're not suggesting you simply copy what the newer entrants in your industry are doing. And nor do you need to. You've got an established business that the newbies would give anything to have. It's also not a case of jumping on the bandwagon created by a rival either.

But you can start evaluating how these disruptors are using technology, particularly automation and AI driven technology, to support their core business or to help them diversify their business model. The future is unknown but that doesn't mean you shouldn't start planning for it.

Use this time to focus on how your business will emerge from this current period with a business model that resonates with the future consumer. It's still about playing to your strengths. But it's in using these strengths in new and innovative ways via the use of technology to survive and thrive in the future trading environment that could be the difference that matters most. Businesses should maximise the capabilities of the technology they currently deploy as well as looking to new or niche technology applications that will provide that relevant edge.

2.

Examine the many operating models in your business

Your business is a complex entity. Many different teams work hand-in-hand to service your clients. To ensure that automation helps instead of hinders the different elements in your business, take time to audit each area and ask yourself how it could be working optimally.



Operations

How do your operations work now and is that the best way to work in future? What is most important for your organisation – a centralised or decentralised model? Do people from other parts of the business need more visibility on how your operations are run? How does automating parts of your operations impact other parts of your business?



Delivery

How can automation shorten your delivery cycle? Are you still using pen and paper docket, delivery schedules etc.? Are some processes still necessary once automation is implemented? Which tasks would employees be able to perform better with the help of technology support?



Employees

Have you got a strategy in place to manage your employees' questions, fears and training needs around automation? Identify which skills you need to recruit or upskill your staff for. Can you appoint an internal champion to oversee this project? Consider whether your current organisational model can adapt to automation, and it might, or if you need to structure your business differently. From an executive team perspective, ensure that you have the correct governance in place. Automation can come with regulatory and compliance requirements.



Sales

Automation and AI solutions can make a big impact in many parts of a business, but it's with sales that their effect is most visible. Examine your pipeline now and then look at the opportunities that automation could provide to identify, nurture, qualify and increase sales.



Technology

Above all, automation and AI needs to be seen as a business strategy, not a technology play. IT needs to be involved, but so too do the various teams within your organisation. It also shouldn't be treated as a one-time exercise; it's about embracing a culture of continuous improvement and using technology to embed and maximise these opportunities.

3.

Place your customer at the centre of your business

Placing your customer right in the middle of your business is not a feel-good factor. Instead, it is a highly strategic move. Stop thinking about how you would like your business to be run and think about how your customers would like your business to operate - breaking this down in minutiae will uncover nuggets of gold that will help you outperform your competition.

Your organisation is most likely made up of many different teams. Each team has their own touchpoint with your customer and their own responsibilities to fulfil. Different metrics are used to ensure the performance of each team.

There's nothing wrong with this approach, which allows for many efficiencies within a business. But who in your business has a full view of your whole customer? It's here that a modern ERP system can make a difference; offering a complete view of your customer in their entirety to those that need it, when they need it and in a format they prefer.

A central and secure location for all your customer interactions enables you to get to know your customers, respond quickly to their problems, offer superior service and generally build up a good rapport with them. And much of this can be automated including ways to generate repeat sales offering targeted promotions or rewarding for repeat business.

In addition, the information held in your customer database will help you recognise various key trends and essential intelligence for identifying different purchasing tendencies of your customers. With this information, managers, sales and marketing personnel will be able to better manage relationships with your customers.

Each interaction your teams have with your customer, online or offline, is no longer seen in isolation to other parts of your business. Your ERP system now has everyone working to one gold standard - delivering the type of operational excellence that drives growth and builds customer loyalty.

Execute your business strategy

No two business strategies are the same. However, instilling operational excellence as a core value within your organisation means executing your business strategy consistently and reliably.

We've provided three actions on how you may do this in our guide. Dependent on which industry you're in, there will be others. These are all elements well worth striving for, but there's a big caveat to heed: the benefits of automation are not always delivered in the first go. Automation tools that enable you to build a culture of operational excellence require ongoing focus and improvement. And you need an ERP system that enables your in-house IT team to do this. Trying, and trying again, is part of the deal.

Plus it takes time to match technological capabilities against business objectives. And just because something doesn't work the first time doesn't mean it won't after another tweak or rethink and deployment.

In the most general terms, an automation implementation process takes the following format:

- Identify processes to automate and capabilities to deploy (remember to start with your ERP or business management software system which should house multiple automation capabilities that you just may not be aware of)
- Enroll the assistance of your systems partner or better still, some modern ERP systems give you the autonomy and control to create or tweak your own automated processes. You might just need a refresher course on how to take full advantage of these in-built capabilities. If your system does not offer these in-built capabilities, you will need to avail of the consultant services offered by your provider. Their sole focus is to engineer ERP solutions to facilitate the level of automation you will be seeking to employ in your business. If the ERP solution cannot answer all your automation requirements, they will direct you to the most appropriate 3rd party solution that can. They will also help you integrate these solutions to your main business management software solution so you always retain one central version of the truth.
- Scale functionality and integrate governance, people and technology to deliver products and services against rigorous customer driven SLAs
- Articulate the strategy to your team(s) and embed automation as an integral part of business delivery

The key is to view your team members and your automation solutions as being on the same side. Get your people and your software to work together, and operational excellence will be the result.

Ready to get started?

Request a demo today to see how our ERP software can help you grow your business and deliver operational excellence

www.intactsoftware.com

