COMMUSOFT

A Practical Guide to Automation
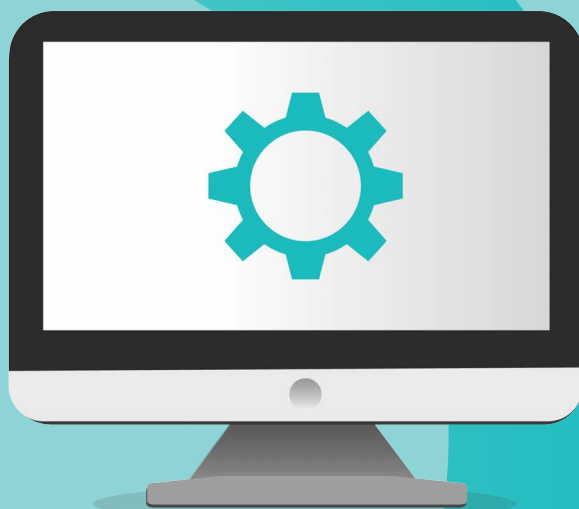
COMMUSOFT

CONTENTS

4 Step 4: Prepare for implementation

Step 5: Choose the right tool for the job **5**

Watch a free Demo

Introduction

Automating any aspect of your business, whether it's simple processes like sending service reminders, or bigger workloads, like job-scheduling: it's all about saving your business time.

And you know what they say: **time is money.**

The world over, all sorts of businesses make use of automation to enhance and grow their services. In order to successfully compete, your business will need to adapt to use automation as well. While it's true that automating is a big step, it's an *essential* one to take so that you can:

• Increase business productivity

• Streamline communication

• Improve the quality of your services

• Allow your business to operate more efficiently

• Provide greater customer satisfaction

You might feel like you're embarking into unknown territory, but if you're keen to achieve these results—and more besides—it helps to have a guide. This way, you can structure, plan, and track your progress.

Step 1:
Define your needs

First and foremost, have a think about your business needs.

Whether you're the CEO or an Administrator in the office, everyone will have an idea of ways they can improve their day-to-day processes.

Needs could be things like:
- "We need to save time spent on scheduling appointments"
- "We need to optimise the way we send messages to customers"
- "We need to digitalise our stock-management strategy"
- "We need more insight from customer reviews"

Take a moment to note down your needs, and any others you might be aware of. Don't worry about going into too much detail, that comes next in Step 2. For now, establish the needs of your business, and you can move on to figure out the pain points that follow as a result:

Need #1:
_____
_____

Need #2:
_____
_____

Need #3:
_____
_____

Need #4:
_____
_____

Need #5:
_____
_____

It's likely that all these needs can be met, whether it's directly or indirectly, through automation. After all, automating one part of your business—such as significantly reducing admin time—means you can put that to use handling tasks requiring a more human touch.

Needs will also change over time and besides, you might not need to automate everything all at once, so it's important to review them over time, every 6-12 months. Depending on the urgency, you could decide whether automating certain tasks over others is necessary immediately, or perhaps worth postponing for a short while longer.

That being said, it can be wise to plan ahead and update your processes in advance so that you can prevent issues occurring down the line.

Step 2:
Do an audit to understand your business' pain points

You might think your business is operating in a way that's "good enough", but then again, if you've discovered needs that you'd like to fix, you're already looking at ways to improve.

So, to understand where automation might be of most use to you, you can next think about the pain points felt across it: not just in your own department.

You'll have an idea of what some of these are already (as discussed with Step 1), but there's a good chance others will have passed you by, particularly if you're not involved in day-to-day admin, finance, etc.

With that in mind, we encourage you to make note of other pain points by auditing your business from top to bottom. This means gathering feedback from the CEO, Office Manager/s, Operations Manager/s, Field Service Engineers, and even your customers.

In your approach, consider the problems you're having alongside the needs you've outlined and think about how automating that task could help you. For instance, you might be missing out on jobs because you're not regularly sending out service reminders. Automation could fix that issue by taking over the process and automatically sending reminders when they're due.

EXAMPLE

CEO Pain Point: Despite positive growth, the business is leaking money; this is coming from inefficient stock and job assignment procedures. These losses negatively impact what would otherwise see us retaining more of our income.

How automation helps: Through automated stock management, your business gains clear oversight of essential stock data i.e. stock location, levels, and can even help with re-ordering parts.

For automated scheduling, booking jobs becomes even easier: highlighting when engineers are free and even suggesting time slots without the need for manual searching and organisation.

Work out additional pain points:

Consider the pain points felt by different team members, ideally speak to these teams to gain their unique insight about the issues they're struggling with.

For this section we'd recommend setting short, individual or group meetings and (on a separate piece of paper or digital document) note down the pain points different staff members experience.

Go into as much detail as you'd like, as it will be useful for creating and assessing the goals and targets you'd like to achieve when you adopt automation as a solution. You might discover some teams experience similar issues, so those can become the priority to resolve.

We've listed down the **main groups to ask**, though you may have other team members to speak with, too. For each group, discuss at least a couple pain points to address.

- CEO
- Office Manager
- Operations Manager
- Field Service Engineers
- Customers

If you want to discover solutions to help you overcome your pain points, check out Commusoft. We offer a whole host of Automation features to help improve workflows, finance, scheduling, and more.

Discover how we can help

Step 3:
Create goals and establish targets

Now that you've established your needs and discovered additional pain points, it's time to create goals and targets you want to hit. After all, you want to see that automation is having an impact and yielding results, so you need to make a plan to help you track that.

For instance, if it's time that you want to save, you'll want to know how it's being reinvested.

A goal to set for this could be:

"For engineers, we want to see if they're able to complete at least 1 extra job a day (on average) due to reduced time spent on admin tasks".

Depending on the targets, results won't be instantaneous. Staff may need time to adjust to new processes, but a timeline of a few months is reasonable to see what might change.

Using the above as an example, you could set the target to reassess after three months. You'll monitor and compare relevant data, such as the number of jobs completed per engineer before introducing automated scheduling vs after it was introduced.

In a conversation with your management team, make a list of other goals you'd like to achieve and set a deadline to assess them at a later date.

GOAL 1:

_____
_____

TARGET DEADLINE: _____

GOAL 2:

_____
_____

TARGET DEADLINE: _____

GOAL 3:

_____
_____

TARGET DEADLINE: _____

GOAL 4:

_____
_____

TARGET DEADLINE: _____

Step 4:
Prepare for Implementation

Whether you're aiming to go paperless, or moving away from manual to more advanced digital software, you need to prepare in a number of ways.

Use the following list below as a guide and check off **YES** or **NO** when they're completed.

If NO, you should aim to set a date (or establish a new goal, as above) for when you want to achieve this by.

#1
Are all relevant teams aware of the changes you want to implement?

Yes ☐   **No** ☐

#2
Have they been involved in your discussions?

Yes ☐   **No** ☐

#3
Do you plan a weekly meeting with your team to follow-up at each stage of the implementation?

Yes ☐   **No** ☐

#4
Do you have a timeline for when and how to implement your plan?

Yes ☐   **No** ☐

#5
Do you have all your information up to date that you need to migrate?

Yes ☐ **No** ☐

#6
Have you put someone in charge of researching the software solutions? (i.e. IT or Operations Manager)

Yes ☐ **No** ☐

#7
Have you agreed on a budget?

Yes ☐ **No** ☐

Step 5:
Choose the right tool for the job

Once you have a clear idea of what your pain points, needs, and goals are, and that you're prepared to implement automation, you need to do your research.

Based on your answers from the previous steps, you should have a good idea of what you're looking for from automation and job management software, but we've also outlined the main functions and criteria you should keep in mind for the ideal automation solution, on the next page.

When reviewing your options, tick either YES or NO based on your criteria.

We advise narrowing down your selection to 3 options, writing the name of each provider and comparing them to weigh up their pros and cons. Make additional notes if needed, and present these to the team.
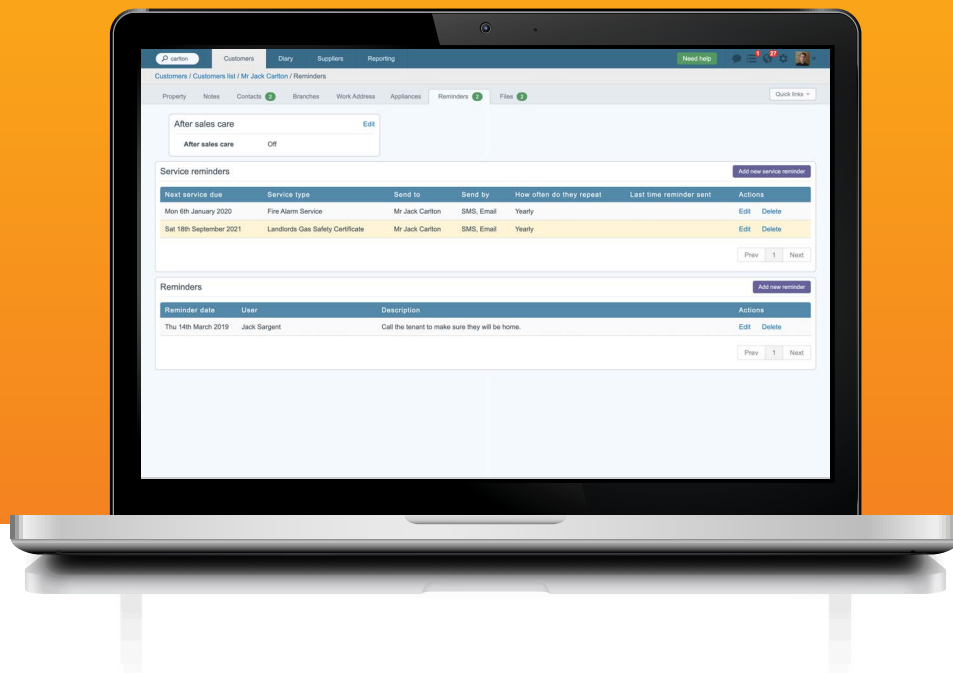
Option 1:

Feature #1 PPM for service planning   **Yes** ☐   **No** ☐

Feature #2 Service reminders   **Yes** ☐   **No** ☐

Feature #3 Mass scheduling for service jobs   **Yes** ☐   **No** ☐

Feature #4 Suggested appointments for booking an emergency appointment   **Yes** ☐   **No** ☐

Feature #5 SLA monitoring for responding to a false alarm   **Yes** ☐   **No** ☐

Feature #6 Stock control for installation   **Yes** ☐   **No** ☐

Option 2:

Feature #1 PPM for service planning   **Yes** ☐   **No** ☐

Feature #2 Service reminders   **Yes** ☐   **No** ☐

Feature #3 Mass scheduling for service jobs   **Yes** ☐   **No** ☐

Feature #4 Suggested appointments for booking an emergency appointment   **Yes** ☐   **No** ☐

Feature #5 SLA monitoring for responding to a false alarm   **Yes** ☐   **No** ☐

Feature #6 Stock control for installation   **Yes** ☐   **No** ☐

Option 3:

Feature #1 PPM for service planning   **Yes** ☐   **No** ☐

Feature #2 Service reminders   **Yes** ☐   **No** ☐

Feature #3 Mass scheduling for service jobs   **Yes** ☐   **No** ☐

Feature #4 Suggested appointments for booking an emergency appointment   **Yes** ☐   **No** ☐

Feature #5 SLA monitoring for responding to a false alarm   **Yes** ☐   **No** ☐

Feature #6 Stock control for installation   **Yes** ☐   **No** ☐

Overall, automation will allow you to convert simple, but time-consuming manual processes into streamlined, easy to manage tasks, allowing your business to achieve more.

Curious to see how Commusoft fits the bill?

Check out the details by clicking the button below!

Learn more!

COMMUSOFT