

Workshop: Automation - Identify and Select Optimal Use Cases

A workshop across departments to identify the optimal automation use cases

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Outcome

A structured process to identify ideas for automation, including scoring and using relative targeting to isolate top candidates. Resulting in a set of potential high yield automation use cases to implement within the company.

What is it?

When a company embark on the journey to automation, this is not a single one-time event by a single department – but a change in culture to automate what is possible and sensible across multiple departments. You can select many processes to automate but it is important that you understand the right ones to focus on among the competing parameters such as time, effort, business impact, and practical feasibility. This is not an easy task and requires a structured approach to identify the candidates.

The NUDGEIT automation workshop uses ideation and selection workshops, which involves employees from various departments, and the presentation of a framework on how to ideate and isolate the most ideal candidates for automation. The workshop is managed by experienced automation consultants using modern, engaging and agile processes to get results.

Content

- Introduction to automation and what back office automation is.
- Examples of 'personal' automation that can be accomplished easily.
- A short overview of the automation landscape and its capabilities.
- Creating an automation, with a practical example demonstrated.
- What are good cases to be automated and their characteristics?
- Brainstorm ideas sessions 1 and 2, presenting idea to groups.
- Discuss weighting and vote on the top 10 ideas.
- Enhance details, discuss weighting and vote to identify the final top 10.
- Estimate the frequency, the impacted workforce, and the estimated effort.
- Establish the important factors impacting the automation use cases.
- Score the individual factors for each use case as a group.
- Review the combined effort and the individual factors, then identify the top 3 candidates with relative targeting.
- Review the process used to ideate and isolate the top candidates for automation.
- Present learnings and feedback.

Duration

5
hours

with a short
lunch break

Cost

2750
CHF

including briefing &
planning time,
excluding travel

Participants

The project driver,
and representation
from various parts of
the business that are
involved in the
back office.