# Checklist: automation readiness

Don't jump to automating processes before you consider all the critical factors. This checklist can help:

- ☐ **Identify what tasks you can automate:** Pinpoint repetitive, time-consuming tasks that could benefit from automation. Start with all those spreadsheets. Much of the work that we do in spreadsheets today is collecting, cleaning and collating information and not value add. Spreadsheets are super useful, but they just don't have the controls, workflow, and data processing capabilities necessary to build a compliant and scalable process. If you have workbooks you use each month or tend to use over and over they could be a great place to start. Automating clerical work will free up loads of time to actually dive into analysis and problem solving.

- ☐ **Standardize and document the processes from #1:** Identify areas where you can standardize workflows and processes. As companies evolve, processes tend to pile up and get complicated. Take a look at the processes your team owns; evaluate what can potentially be eliminated, combined with another, or simplified without causing significant risk. You will struggle to automate processes that aren't clear, so this is a foundational step.

☐ **Understand your data sources:** Ensure you know the operational sources of your data and what exactly they contain. For each source, identify the key information and that that is nice to have and also anything that links to another source. You might find that you're handling a lot of redundant or duplicate data within or across various sources. It's best to trace those back and capture just the original so there's no question of which information source is correct.

☐ **Identify technical architecture gaps:** Assess whether your current technical infrastructure can support automation of your critical use cases. This is another area where spreadsheets can be a culprit if they are part of your workflow. Data hides in them, people spend time hunting for the right version of a spreadsheet, or waiting for someone else to send them information. Look for ways to get back to the original source and get creative about automating that data collection! There are many modern tools that can help.

☐ **Identify key skills gaps on your team:** Where does your team have skill gaps to design or manage automated systems (one common issue we see is not having a sufficiently detailed understanding of data sources — see #3)?

☐ **Cost-benefit analysis:** Measure the potential savings in time and cost against the initial investment in automation technology. Include all the time you spend looking for, wrangling, and adjusting data to fit your needs, plus the tradeoff you're making when there are better uses of your time.

☐ **Evaluate vendors:** Consider different automation solutions and vendors. Look at features, cost, support, integration capabilities, etc. But also consider where your future lies and if it maps to the vendor's vision and roadmap. If you're working to run a modern business do you really want a vendor that is not keeping up? Or isn't investing in their technologies? Choose a scalable solution that can accommodate future growth and changes. None of us really know what's coming, but having a partner that can adapt and work with you can make a big difference, especially when time is constrained and business is challenging (is it ever not?).

☐ **Assess risk:** Identify potential risks and plan mitigations for each risk. Automation is not a panacea. What it can do is eliminate the simple, frustrating, and time consuming errors that crop up any time you use operational information in accounting. This frees you up to spend more time analyzing and preparing that data for others and focusing on the bigger risks and challenges in your business.

☐ **Manage change:** Prepare your team for changes brought about by automation. Get them involved early and take their concerns and input seriously. They'll have some good ideas and some that will be eye-opening for you!