

Can't Afford To Automate? (Maybe You Can't Afford Not To)



David K. Williams Contributor ⓘ

Entrepreneurs

Using the soft skills for organizational success

I recently re-connected with fellow entrepreneur and leadership expert Lyle Ball. Those of you who've heard his name may recall his roles in advancing Open Source technology for Caldera and Lineo, Bungee Labs and a number of other technology and venture capital firms. Most recently he is heading up a SaaS technology company, Avii, providing a unified practice management platform for tax, audit, advisory, management consulting and compliance.



Lyle Ball is cofounder and CEO of Avii AVII.COM

One of the things we discussed is automation in business. Few topics provoke more opinions or emotions, Lyle notes. And even in the most advanced organizations, there are plenty of people doing it wrong.

To help, he suggests people first recall the definition of automation-- the concept of setting up a machine or software process to perform work *automatically*. The main idea is to save on the costs of human capital, improve efficiency and reduce human error. To find the things you might best automate and to get started he offers the following helps:

1. **Consider any task you repeat more than three times in a given time period.** For example, a leading professional services firm on the east coast uses Google.docs as their means of secure document exchange with clients. But here's the challenge. This company, which works in the compliance space, requires a significant number of folders and subfolders for clients to load their documents in.

For each new client, a senior professional was taking up to four hours to purge out files from prior accounts to create a clean template with new names, new logos, etc., for the incoming client to use. This is something effective automation can accomplish in minutes—yet for every new account it they were spending four professional hours.

2. **If you're having a hard time judging whether automation is good or bad, start with your client relationships.** As a matter of principle, Ball suggests you never require your client to pay the price for your own delays in software automation. So, while you're trying the concept on for size, take the benefits to the client side first. You will benefit with stickiness to your service and satisfaction in the area where it matters the most. The clients will stay with you, will grow, will be satisfied and will tell others. This principle also applies to situations where you may want to automate, but stakeholders are digging in their heels. When you take the benefit to your clients, first, interestingly, everyone seem to soften their stance. Revenue and clients become the benefit that allows the newer decisions to flow.
3. **One of the biggest barriers to automation is trust.** Can you set the process up in a way that is safe without human oversight? For example, in the financial, advisory and auditing world, the fear might be the risk of outcomes such as losing a critical file and making your client noncompliant. Professionals may need to see a system in action before they are willing to trust an automated process with their critical files.

But here's another perspective that is central to the automation software Ball's company is working on now. In categories like project management, task management and secure document exchange, automation is particularly imperative for financial, advisory and compliance practices. In these arenas, access to big data is useful or potentially even required. Consistent process is vital, and uniform storage, security and access to documents can be a matter of life or organizational death.

Surprisingly, as companies worry about security, Ball notes that security loss for stored documents (due to issues such as system failure or getting hacked) is far less frequent than loss that occurs during the transit of documents.

“Think about the Brinks money truck driving out and to the location of delivery and back,” he remarks. “The risk of theft during transit is the piece that people often forget.”

While companies may store documents in a secure manner, they may continue to send secure and private or protected data through email, he notes. Even email that is secure and encrypted is hackable, he says. Or they may talk in email about the state of health of a business (their own or a client’s) which would be highly valuable information to a competitor. Additionally, people transmit trademarked or patented information or discuss trade secrets.

As advice, he urges organizations to think about automating the direct upload of any document containing HIPAA information, credit card numbers, SSNs and dates of birth and holding private dialogues only within a protected workspace.

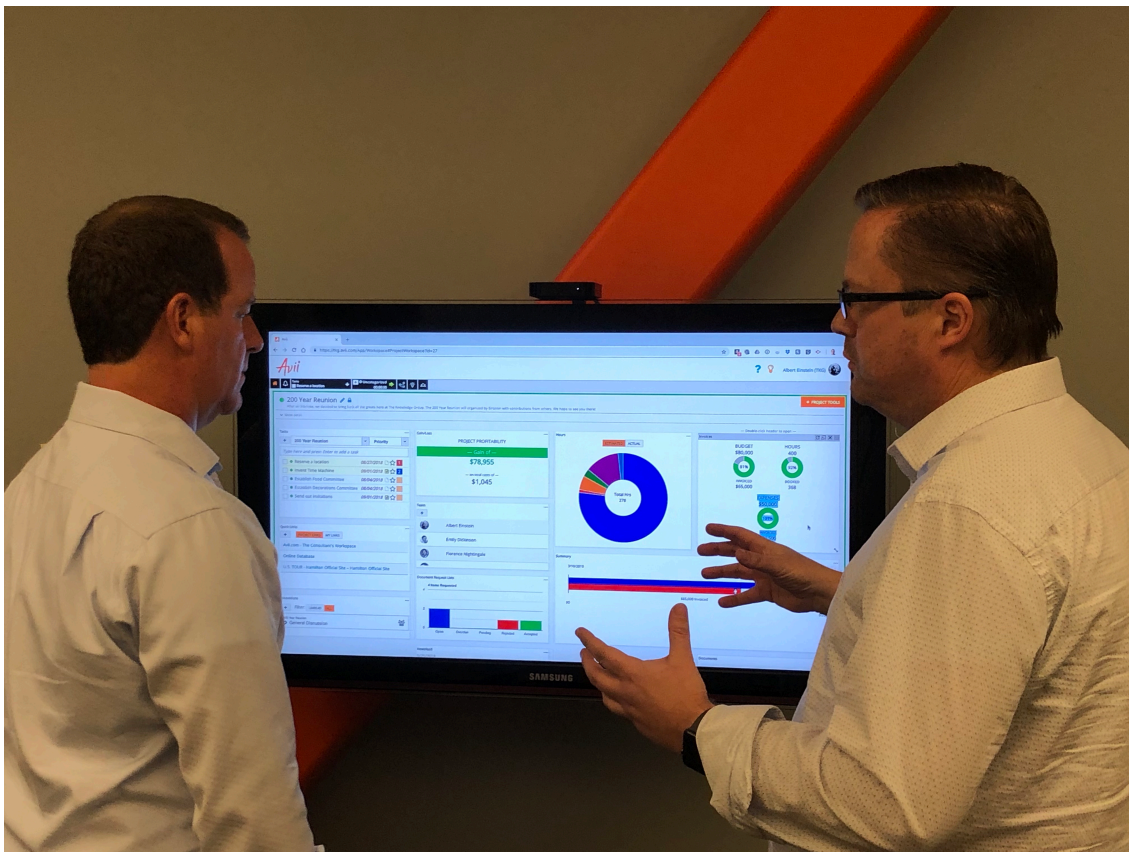
In all, there are 12 categories of automation Ball considers most key to a finance, advisory or audit organization in particular:

- 1. Client Onboarding**
- 2. Project Setup**
- 3. Workflow**
- 4. Technology Integration**
- 5. Dashboards and KPIs**
- 6. Secure Data Exchange and Storage**
- 7. Fieldwork and Review Cycles**
- 8. Engagement Optimization**
- 9. Report and Submit Outputs**
- 10. Knowledgebase**
- 11. Continuous Engagement**
- 12. Communications**

Of all of categories, communications may be the most vital of all, Ball notes. We should only rely on text and email for very limited purposes, he believes, and not as a means of exchanging documents and seeking updates.

“We overload our text and email inboxes because we’re using them for things that should be visualized live on a dashboard,” he says. “Instead of incessant texts and messages about a project, imagine seeing only an alert to let you know if a part of a project has fallen behind or is coming due.”

This facet is one of the most exciting aspects of automation through the “SaaS Hub” implementation Ball and Avii espouse. The incessant bells, chimes and alerts from inside and outside of organizations make it hard for even the most disciplined professionals to stay on task. Imagine the value of automation that removes distractions and shows you (and your employees and clients) only the value-add notifications they really need and want to see. Productivity and satisfaction would soar.



Lyle Ball, Avii CEO, and Jason Caldwell, Avii CTO AVII.COM

In all, spreadsheets, email and Instant Messaging are rampant for things that are not optimal. For anyone looking to automate, these are the areas that most benefit from bringing out the big guns to eliminate, Ball says.

Automation should enhance and empower human interactions by providing continual access to meaningful data and business intelligence for client. It must also allow individuals and teams to use their time for things that give them and their firms highest value, not cutting and pasting in a spreadsheet.

Most importantly, automation should increase the creativity and connection between consultants and clients, while also ensuring that service levels increase. The human aspects are the invaluable jewels that give meaning to every transaction or interaction. Any automation that doesn't strengthen and uphold the principles of courtesy, respect and enrichment for the lives it touches, Ball maintains, is destined to fail.

In the case of Avii, Ball notes that his company has created a single workspace to unify key functions within a single platform for both practitioners in the company and their clients—something Ball has defined as a “SaaS Hub.” It interconnects many things we may not be used to automating.

On the matter of SaaS, Ball notes, many if not most companies have no idea how many disparate SaaS products they're using. When they step forward to automate, they find duplicate systems and redundant products and functions. Because the products come in through differing avenues for access to a particular feature or two the scattered products bring inconsistency and risk to the workplace. The company will also typically have no idea how much money they are spending on SaaS because many of the purchases come in on expense reports, not through IT purchasing. Imagine suddenly finding you're spending or saving \$1,000 a year per professional, let alone the task of managing the logins and passwords and auto renewals employees tend to forget. Now imagine you could spend much less to bring these functions together into an automated and unified hub.

By now it should be clear that automation can be the lifeblood of your personal and business success, but will never be an effective replacement for the human support and interactions employees and customers crave. In fact, the better we understand and respect the interplay between humans and automation, the more successful, fulfilled (and profitable) we will be.



David K. Williams

I am the founder and chairman of DKW Ventures. I am a serial entrepreneur, have led divisions and companies and a C-level executive for companies ranging from startups t... **Read More**

Reprinted from Forbes

8/28/19