

# DEVELOPING AN AUTOMATION STRATEGY THAT DELIVERS RESULTS

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Automation promises to address many challenges facing healthcare organizations today by reducing costs, increasing efficiency and creating a 24/7 virtual workforce. However, successfully implementing automation requires more than just the purchase of a robot. To realize these results, organizations must create an intelligent automation strategy that aligns to the goals and objectives of your health system. An organization-wide automation vision should fuel this strategy, lead to the creation of an Automation Center of Excellence and assist in identification of the appropriate tools for tasks. Through this process it is critical to engage employees in these processes to increase buy-in.

## Define Your Automation Vision

Just like your organization-wide strategy sets the vision and defines strategic objectives, your automation strategy should do the same. Start by identifying your overarching goals for leveraging automation and the strategic areas that you feel could most benefit from automation (and what level of automation will be required). Consider

the human capital and technology resources that you have available to dedicate to automation and whether additional investment in people and technology will be needed.

To help define your automation vision, consider the following questions:

- **What are the business problems your organization is trying to solve through automation?**
  - Start with the end in mind and define the outcomes you are trying to achieve before you begin. While some organizations are focused solely on cost savings, others may prioritize increasing accuracy, enhancing the customer experience or reducing vendor utilization.
- **What does success look like in one year or three years?**
  - Be clear in how you will measure results by developing tangible goals such as the amount of time you want to save or the number of processes you'd like to automate in a certain time period.
- **What are the risks if you don't increase your level of automation?**
  - Consider the pressures your organization will face in the future and the risks associated with continuing with your current approach. Think about ways automation could give you a competitive advantage

in the market or if you could lose your advantage by not adopting more advanced automation technologies.

- **How committed is your organization to pursuing automation?**
  - If you want to be on forefront of automation, your organization will need dedicated resources and will need to make difficult decisions on where to prioritize resources against other organizational imperatives. To successfully achieve your objectives, a strong organizational commitment to automation is needed.

## Create an Automation Center of Excellence

Governance of your automation strategy is vital. How you set up an Automation Center of Excellence (CoE) is one of the most important decisions an organization will make. There isn't a one size fit all solution, tailor your approach to your organization's culture, goals and abilities. A successful structure is often one that blends centralized ownership of key tasks and empowers operational owners to execute on the strategy.

As you set up your CoE, consider the business owners' needs and technical skill sets. Business units that have embedded technical resources and are currently managing their systems can sometimes take larger ownership in the creation and maintenance of automated processes. A more comprehensive CoE is needed if business units aren't accustomed or well-suited for these responsibilities.

Responsibilities of a CoE include:

- Creating standard policies on what can or cannot be automated by assessing where automation could expose the organization to risk. Consider the worst thing that could happen if an automated process breaks or doesn't perform as planned.

- Coordinating between systems to ensure automation doesn't unexpectedly impact other technical operations. Your CoE can also assist in coordinating system access and password management.
- Creating a clear change management approach for implementing automated processes to ensure appropriate quality assurance and security checks are completed.
- Providing organizational training, success tracking and KPI review.
- Orchestrating the scheduling of the automation when multiple automations are in place. This ensures the most efficient execution.

## Develop an Approach for Automation Tool Selection

With multiple tools and techniques available for automation, there's not a single technology that fits every use case. Each has strengths and weaknesses that are important to understand – Robotic Process Automation (RPA) may be the best option when integrating automation across platforms, while using an existing interface or API can be more efficient in other cases. Use a scoring method to assess automation business cases and identify the appropriate automation technology.

As part of the scoring method and your technology evaluation consider:

- Cost to create and maintain automation
- Time until the automation needs to be deployed
- Availability of resources to execute on automation objectives
- Security and stability of the automation
- Number and complexity of automation systems that need to be managed
- The need to integrate with other technologies (i.e., optical character recognition or a machine learning tool) to perform automation

By learning what various automation technologies can and can't do and assessing the return on investment (ROI) of a given tool for a process, you can determine the tool to best automate a process. A well-designed automation suite will include tools that cover desired use cases without increasing complexity of maintenance or causing unnecessary cost due to selecting multiple similar tools that overlap in functionality.

## Align People to Your Strategy

Your employees are the key drivers of a successful automation strategy and need to be empowered to make an impact. By focusing on people throughout your automation journey, you can ensure organization-wide alignment to the broader strategy.

An automation strategy requires constant communication to key stakeholders. Since automation will shift the roles of some individuals, a change management approach that proactively communicates to these individuals and provides broad updates on the automation strategy is essential. Leadership can help manage change risk by:

- Communicating about the automation plan and vision across the organization so that all affected individuals can understand how automation will play into their future role at the organization.
- Providing transparency around the program to decrease fear that automation is going to replace jobs. Leaders can give staff an idea of the role the technology will play, how it could improve broken processes that exist today and the implications might be on their roles moving forward.

## Keep Process Improvement in Mind

To realize the full benefits of automation, the underlying processes must be optimized to provide the most value to the organization. Automating bad processes can create risk and minimize results. A sustainable program views automation as part of a holistic performance improvement process.

Before automating, consider the following:

- Is the process and all related decision-making principles standardized and documented, or is the process performed by individuals performing steps differently and making decisions based on different criteria?
- Are you looking through the lens of automation? Automation changes some of the key assumptions around processes. Simply replicating what is manually being done today doesn't take full advantage of an automation's capabilities.
- Are there many different hand-offs? Excessive hand-offs could be a sign that pieces of the process are currently redundant or unnecessary.

Some processes can exist in organizations for decades without being critically assessed. Therefore, before you try and automate, it's imperative that you step back and critically look at the process that's currently in existence.

With a strategy for automation, healthcare organizations can begin the journey in shifting from manual, labor-intensive processes to more automated strategies in a cohesive, goal-oriented way.

## Key Takeaways

To implement automation technologies or find opportunities to use them at your organization, begin to:

### Think differently.

Don't view automation as a series of use cases to be individually implemented, but as a part of your larger automation strategy.

### Plan differently.

Develop an automation strategy that holistically looks at the types of automation, business processes that could benefit from them and a roadmap for executing on the strategy.

### Act differently.

Seek user feedback and continuously explore opportunities to refine existing automation processes or implement new ones.



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18-0823