Gaining Efficiencies through Automation
Evaluate, Assess, Select and Implement

This Presentation is built on the idea that change can occur

Open your minds with me and “THINK”

(e-mail me for presentation – notes are added to each slide - this is the first step in thinking about automation😊)
What is Automation

**Definition**

- The act of implementing the control of equipment with advanced technology; usually involving electronic hardware; "**automation replaces human workers by machines**" [www.wordreference.com/definition/automation](http://www.wordreference.com/definition/automation)

- Office **automation** refers to integrating clerical tasks such as typing, filing and appointment scheduling. [www.pcmag.com/encyclopedia_term/0,2542,t=automation&i=3...](http://www.pcmag.com/encyclopedia_term/0,2542,t=automation&i=3...)

The key is that replacing human workers is a difficult conversation within organizations and often times the most expensive aspect of budgets. I mentioned the word “think”; think about your organization.

As Finance Directors, CFO’s, VP’s, have you honestly dissected each position within your organization? Where do opportunities lie? Ensure each member within the work unit has a balanced workload and is as efficient as possible (an example - a staff member had a single feed scanner, scanning being a regular routine of the position spending – 3-5hrs of time each week, after speaking to the employee about what is one thing that could make the job more efficient, the staff member mentioned, “a quicker scanner” – for less than $500.00, this staff member now spends less than ½ hr scanning documents), if we would not have asked, we would have never stopped to realize this! This one small thing was a display of our dedication to reducing costs and becoming more efficient.
Automation during 1970s – 1980s

THE INTEGRATION OF OFFICE INFORMATION FUNCTIONS, INCLUDING WORD PROCESSING, DATA PROCESSING, GRAPHICS, DESKTOP PUBLISHING AND E-MAIL. THE BACKBONE OF OFFICE AUTOMATION IS A LAN, WHICH ALLOWS USERS TO TRANSMIT DATA, MAIL AND EVEN VOICE ACROSS THE NETWORK.

ALL OFFICE FUNCTIONS, INCLUDING DICTATION, TYPING, FILING, COPYING, FAX, TELEX, MICROFILM AND RECORDS MANAGEMENT, TELEPHONE AND TELEPHONE SWITCHBOARD OPERATIONS, FALL INTO THIS CATEGORY. OFFICE AUTOMATION WAS A POPULAR TERM DURING THIS TIMEFRAME AS THE DESKTOP COMPUTER EXPLODED ONTO THE SCENE.

“Think” about it, we have automated almost each of these functions
This drawing was made by the author in 1981 to depict an integrated terminal in the office of the future. All these functions are available on today's computers.

In some fashion this particular depiction is very accurate, change occurred and we embraced it, possibly more than one would imagine. “Think about the next generation”! The Mobile Device is changing everything gain!
Enterprise Resource Planning

• **Enterprise resource planning (ERP)** is an Integrated computer-based system used to manage internal and external resources, including tangible assets, financial resources, materials, and human resources. It is a software architecture whose purpose is to facilitate the flow of information between all business functions inside the boundaries of the organization and manage the connections to outside stakeholders. Built on a centralized database and normally utilizing a common computing platform, ERP systems consolidate all business operations into a uniform and enterprise-wide system environment.[1]

• An ERP system can either reside on a centralized server or be distributed across modular hardware and software units that provide "services" and communicate on a local area network. The distributed design allows a business to assemble modules from different vendors without the need for the placement of multiple copies of complex and expensive computer systems in areas which will not use their full capacity.
Enterprise Asset Management (EAM)

- **Enterprise asset management (EAM)** means the whole life optimal management of the physical assets of an organization to maximize value. It covers such things as the design, construction, commissioning, operations, maintenance and decommissioning/replacement of plant, equipment and facilities. "Enterprise" refers to the management of the assets across departments, locations, facilities and, in some cases, business units. By managing assets across the facility, organizations can improve utilization and performance, reduce capital costs, reduce asset-related operating costs, extend asset life and subsequently improve ROA (return on assets).

- The functions of asset management are **taking a fundamental turn** where organizations are **moving from historical - reactive (run-to-failure) models** and beginning to embrace **whole life planning**, **life cycle costing**, **planned and proactive maintenance** and other **industry best practices**.
Automation Acronyms

Content Relationship Management (CRM)

- **Customer relationship management (CRM)** is a broadly recognized, widely-implemented strategy for managing and nurturing a company’s interactions with customers, clients and sales prospects. It involves using technology to organize, automate, and synchronize business processes—principally sales activities, but also those for marketing, customer service, and technical support.

- The overall goals are to find, attract, and win new clients, nurture and retain those the company already has, entice former clients back into the fold, and reduce the costs of marketing and client service. [1] Customer relationship management denotes a company-wide business strategy embracing all client-facing departments and even beyond. **When an implementation is effective, people, processes, and technology work in synergy to increase profitability, and reduce operational costs**
Meaningful Automation

Examining opportunities for automated processes at it’s most basic form in Government

Getting started is Easy ”if”

- Evaluate functions, processes or purpose
- Analyze data – Define requirements
- Select samples to test
- Implement Systems
Automate Business Processes

Most Basic Form – Phase I

Review highly repetitive, transactional processes that are tedious or of low-value. If the process is of low-value or tedious then…

- Determine who interacts with the data
  1-2 individuals, City Council, School Board, Entire Constituency
- Measure the length of time staff member(s) spend
- Evaluate the use of the data – take inventory & determine if the data is actually being used (you might be surprised that the time spend by knowledgeable-high value staff member(s) is not being used or even necessary) – Think about this, if you stopped doing something, would someone notice?

Phase I Goal – Achieve Higher Work Productivity on value oriented processes, tasks, or new projects (Conduct Cost-Benefit)
Automate Business Processes

Most Expensive Form – Phase II

Review the functions within workflow or processes that are the most expensive each Month or Fiscal Year.

• Think outside of your organization
  - Internal or External or City wide government functions
  - Business to Government functions
  - Constituent to Government functions

• If the function, purpose or process is breaking the bank, think of ways to do things differently or replace it via automated tools that can cut costs quickly

Phase II Goal – If law allows and board approves: Begin (Project Planning – System Selection – System Implementation)
THINK about the computer you use every day to do your job. Think about the car you drive to take to work. Think about the bag phone versus the I-Phone, the bathroom sink here in the hotel with the motion control sensor the food you eat; water you drink; and appliances you use to store, prepare, and clean them. Think about the television you watch or the music system you listen to.

Think about any modern convenience or necessity. Just about anything you can think of is the result of complex processes. Without talented individuals to design, build, improve, and maintain these processes, these technological advances would never have occurred and future innovations would be impossible.

Things that were a convenience are now considered necessity! (i.e – mobile device) It is absolutely critical to begin thinking!

http://www.automationfederation.org/Content/NavigationMenu/General_Information/Partners_and_Affiliates/The_Automation_Federation/About1/What_is_Automation_/What_is_Automation_.htm
What’s your “Ideal” Treasury Look Like?

Collaboration - Open Communication costs nothing. Is it possible that you could create greater “Buy-off” by department heads if you told each of them to be creative, “find efficiencies within their departments and report back areas of improvement or opportunities to automate functions” versus asking them to “cut-their budgets?”

1. Determine Priorities
   1. What is the most tedious task that can be automated immediately?
   2. What is the most expensive task that can be automated?

2. Assemble Key Stakeholders – assign a project manager
   the more that time passes, the more likely your project will lose focus, commitment and urgency as well as the potential savings!

3. MAKE “TIME” a priority
   1. Set Milestones
   2. Report Progress
   3. Start Saving
Think You 😊

Automation

Doing more with less is now doing things differently and more efficient.

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