BUILDING BUSINESS AUTOMATION: KNOWING WHEN ENOUGH IS ENOUGH!

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Building business automation: understanding when enough is enough!

Business automation is a bit of a buzz word these days. Depending on where you go on the internet, and to whom you’re connected to on LinkedIn, you’ll probably have read blogs about it (oops!), have been bombarded with amazing success stories (undoubtedly exaggerated), or been inundated with terrifying warnings (also, of course, exaggerated).

I’ll put my hand up right away and admit to some bias: I’m extremely involved in designing and building business process automation for our clients using the Citrix Podio platform. I am decidedly NOT a neutral party.

And look, when it comes time to think about what parts of your business and your process you can automate, it’s important to remember the good, the bad and the tricky:

**Good** - automation can push key processes along, ensuring important elements and activities are not missed.

**Bad** - You can vastly over engineer your processes and overwhelm your teams with notifications and tasks, so much so that they’ll stop using your system properly (or even entirely).

**Tricky** - Finding the balance between these two is tough. I mean, really tough.

**Our Evolution**

I’ll make another confession. I first got involved using Podio about six years ago, and it wasn’t as an expert. It was as a small business owner desperately seeking a good tool to manage his growing business (and sometimes unmanageable projects) and his disparate team.

And guess what? My first Podio design was a disaster. Properly so. I can’t go back and look at it without twitching a bit.
Of course I didn’t know any better and, like a kid in a sweet shop who has just been given an all-you-can-eat pass, I took the basic tools available to me and started to try to automate every single step of our business.

Did we have a sales process? Sure we did! So why not make every step automated? That’s going to be great isn’t it? That will speed things up.

What about a project management process? Yep…we had one of those too…of course I can automate tasks, make warnings, move dates forward, close off project elements…

You name it, I built it.

You name it, I automated it.

You name it, I fucking hated it.

And so did my staff.

You see by automating all sorts of steps within each process, what I had ended up doing is creating a big, complicated mess that couldn’t actually stand up to the realities (and rigours) of running a live project.

We were constantly hit with warnings and tasks.

We were constantly having to re-assess timelines that had been automatically changed for us.

In short: our fancy new automated system was actually causing us to leave the system behind. My staff didn’t want to use it, constantly complained about it, and I found myself having a complete re-think of even the idea of business systems, business processes and business automation.
I went back to the drawing board, drastically simplifying the way the system worked, seriously limiting the interactions that the system enforced on the users and significantly streamlining the process of working within the system.

Within about a month we had increased our productivity by 30%. I knew we had a winner, and it set us on the path of becoming, completely accidentally, one of the top Podio Partners in Europe.

**Not just design, our thinking changed**

So how did we manage to turn around a system that was horrifically complicated and monumentally difficult to use, and transform it into a system that increased our capacity, increased our productivity, increased our transparency and increased our collaboration?

It wasn’t just about the design: we had to change our mindset. We had to change how we thought about business process development in general and, more specifically, about how business process development interactions with the people.

Systems are fine, but it’s still people who have to deal with them, so we had to re-engineer our thinking to start to develop a methodology for developing business processes based on people first, and systems second.

Cut to today, and we’re now designing and implementing Podio systems into companies of all sizes across ten countries.

What sets us apart is specifically the hard learning curve we went through when we first started with Podio. In essence, our mistakes redefined our mindset and set us up to become much better at what we do.

**An approach that works**

When we design systems now, we spend as much time analysing the business, the people and the processes as we do designing and building the systems. We have to, in order to ensure that the systems WE build fit the company, and the people, like a glove.

Over the years, we’ve developed a rigorous approach that simply, well, works. In brief it’s:
Bonjour

Business Analysis -
During the business analysis, we go deep into the company to really understand who they are, how they work, what they do and what they need. We pull lift under the rigs and pull back the curtains. We challenge our clients. We ask the questions “why”.

Business Needs -
We take everything we have learned about the company and we run it though our own internal analysis, coming up with a defined set of “Business Needs” specifications that we believe are critical to the client’s system. This is not a technically exercise. The questions isn’t “how” it should be built, but “what” does it need to do. This is a critical document as it guides the next phases of development.

Design -
The process gets simpler from now on. We take everything we learned during the first two phases and draw out the design of the system. We draw out key processes and key system features. We design how the interactions will go across the company and what key automations are to be included.

Build & Test -
I told you it gets simpler: we build everything. Everything. Integrations, Dashboards, Podio…you name it.

Data Migration -
This sounds simple, but depending on the type of company we’re working with it can mean carefully integrating hundreds of thousands of items and ensuring they are linked together across a complicated system. It’s not that easy, believe me.

Training & Support -
We provide numerous training programme options for our clients, and a comprehensive support setup that ensures that they, their system, and their data are completely looked after.
And now, back to automation

Sorry for what looked like a sales pitch, but it’s actually a critical part of understanding how automations can work for your business.

You see most people run when they should actually walk.

As the saying goes “just because you can do something, doesn’t mean you should”. Automation should be viewed exactly this way.

Don’t rush into automation just because you CAN do something. It’s critical you take the time to actually look at the business, how it works, and how the people work, in order to make sure that what you build is helping, and not hurting.

When it’s done right, business automation can have a significant and very real impact on your business, but do it wrong and you may receive an almost immediate (and relatively brutal) shock.

Sales pitch two: If you’re wondering about how you can develop the right business system, and the right business automation, for your business, hit us up with a message. At the very least we’re always happy to give a bit of advice, but you’ll be surprised what a good investment into your business processes, systems and automations will get you.
About Gamechangers

Our journey building amazing business systems started with our own. We initially investigated Podio as part of our own quest to find a system that could improve our internal efficiency.

In the first year we improved by 30% and I knew we had found something special. We’ve now built systems in eight different countries and are key members of the Podio/Citrix family.

Global Capability, Hands-On Support

With teams in both North America and Europe we can scale to meet the needs of any organisation – from ambitious local businesses up to large multinational corporations. We are capable of delivering 24/7 support where needed, and can provide hands-on training anywhere in the world.

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