## Business Process Automation Worksheet

Your business is made up of core processes your team repeatedly performs. The goal is to increase profits and keep costs down while keeping your team, vendors, and clients happy.

So, when is it time to standardize your processes and use automation effectively?

* Your team is out of bandwidth, leading to errors and mistakes
* Slow processing times cause frustration with vendors or clients
* You’re unsure if you’re doing well or could be doing better
* Preparing for audits or proving you’re managing PII and company information securely is cumbersome.

To reap the benefits of automating your core business processes, you must first understand what they are, identify bottlenecks and opportunities, and separate the “thought tasks” from “business rules.” You’ll accomplish this here. You’ll then work with the DocuXplorer team to implement your strategic process.

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**Department**:

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**Business Process**:

## Your Current Process

**Step 1: Creation**

What starts the process?

Where does the record originate?

Do you generate it in-house? Do you receive it from a client or vendor?

What format is it in? (Email PDF attachment? Physical paper? Word Document? Online form?)

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**Step 2: Business Process**

What steps does the record go through?

*Does it get reviewed? Revised? Validated against other records? Approved? Reminders? Signatures?*

List out each step, who is involved, what technology you use, and estimate how long it takes

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| --- | --- | --- | --- | --- |
| STEP | ACTION | TECHNOLOGY | USER | TIME |
| 1 |  |  |  |  |
| 2 |  |  |  |  |
| 3 |  |  |  |  |
| 4 |  |  |  |  |
| 5 |  |  |  |  |

**Step 3: Retention**

How long are you required to retain the record? Do you get audited on these records?

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**Step 4: Access**

Who can edit this record? Who can view this record?

Can users share this record outside of DocuXplorer? (Print? Email?)

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| --- | --- | --- |
| **EDITOR** | **VIEWER** | **OTHER RESTRICTIONS** |
|  |  |  |
|  |  |  |
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**What’s not working today?**

Look at your process steps in step 2; what issues come up over and over?

***Bottlenecks:*** *Is one person responsible for making information available to others?*

***Handoffs****: Does information move from one person to another, and things fall through the cracks?*

***Validation****: Do users need access to other records to complete steps?*

***Tracking****: Is it unclear what comes next or what the status is?*

***Security****: Can a record go missing?*

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**What’s the impact on the business?**

How do these challenges create risk or loss for the company?

*Examples include underbilling clients, late payments, failed audits, and undelivered products or services.*

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## Where does DocuXplorer come in?

Now you understand what you’re doing, who’s doing it, how long it’s taking, and what’s at stake. From this information, you can determine how much it costs if you make no change.

Your DocuXplorer advisor will review this process and identify strategic opportunities to use automation and AI to **reduce costs and risk** and **improve accuracy and efficiency**.

Schedule a review session