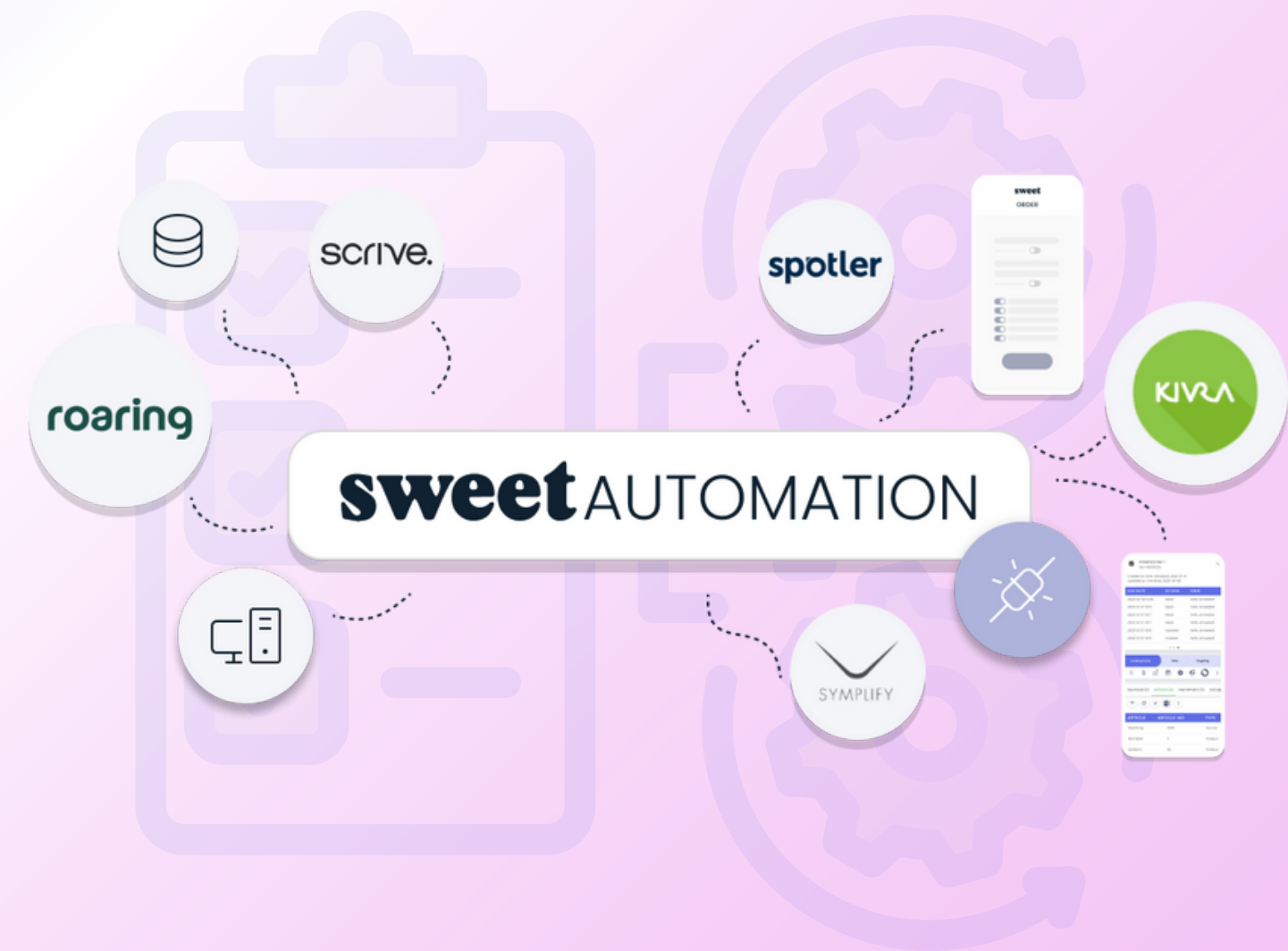# Efficient automation:
6 steps to find and determine the right automation tool

The path to the right automation tool

In this guide, we provide guidance on how to approach investing in a tool to automate tasks, processes, or larger parts of your business.

What is automation?

Automation involves replacing manual tasks or processes with system support that performs tasks sequentially in a specified pattern based on rules and selection. These rules can determine when the task should be performed, whether it's on-demand, triggered by a specific signal, or at a certain frequency.

The rules may also include which parameters or criteria need to be met and gather more information along the way before certain actions are taken.

Selections, determines whether something should occur and for what or whom, can also be controlled down to a detailed level provided that the right information is available for the decision.

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Start by assessing your needs

Navigating the landscape of automation tools can seem challenging given the number of solutions available on the market today.

So, how do you choose the **right automation** solution**?**

We've summarized **6 questions** you should ask yourself before selecting an automation tool:

1. **What tasks or processes do you want to automate?**
2. **What type of automation are you looking to achieve?**
3. **Where are these tasks or processes currently performed?**
4. **Which systems or solutions need to be involved in the automation?**
5. **What resources do you have to invest in and manage the solution?**
6. **What future automation needs do you anticipate?**

Once you have a clear understanding of your needs, it's time to explore different providers of automation tools. Compare their offerings, features, and pricing to determine which best suits your needs and budget.

Whit automation you can achieve

- Increased efficiency
- Decreased cost
- Happier customers

1 Which processes should be automated?

When it comes to determining which tasks or processes to automate, it's important to carefully consider the scope of automation and its potential impact on the business.

Depending on whether it involves individual tasks or multiple interconnected processes, different approaches and tools may be appropriate. For larger processes with various types of tasks, it's important to choose a versatile solution that doesn't restrict the ability to manage multiple processes simultaneously.

Here are some examples:

A Simple automation
If it involves individual, routine tasks or processes, a simple and readily accessible tool may be sufficient to streamline the work.

B More extensive automation
When dealing with more complex processes involving multiple steps and decisions, a more versatile and powerful automation solution may be necessary.

A Simple automation

Examples of such automation tasks could include:

1 Automatic e-mail responses:

By using an automation tool, you can configure the system to send a predefined email response to users when they submit an inquiry or contact request.

2 Creating business opportunities in the CRM:

Automate the process of creating a business opportunity in the CRM system every time someone shows interest in your product or service. ler tjänst.

3 Archiving digital documents:

An automation tool can assist in archiving contracts, applications, or other digital forms after they have been processed, saving time and reducing the risk of improper archiving.

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Ⓑ Extensive automation

When dealing with more complex processes involving multiple steps and decisions, a more versatile and powerful automation solution may be necessary. Examples of such automation tasks could include:

1 Digital handling of applications and onboarding:

Automate the entire process of applications and onboarding by allowing the system to make automatic decisions based on inputted information and respond to the user's actions or answers to questions.

2 Advanced contract signing:

Implement an automation system that can handle digital contract signing and automatically make decisions based on specified criteria or user responses.

3 Customer support and ticket management:

Implement an automated customer support solution that can manage and prioritize incoming tickets, provide automatic responses to common questions, and escalate complex issues to humans when necessary.

4 Data management and reporting:

Automate the process of collecting, processing, and analyzing data from various sources to generate reports and insights that can be used for strategic decision-making.

5 Compliance and risk management:

Automate the process of monitoring and maintaining compliance with rules and regulations within the organization, as well as identifying and managing risks proactively.

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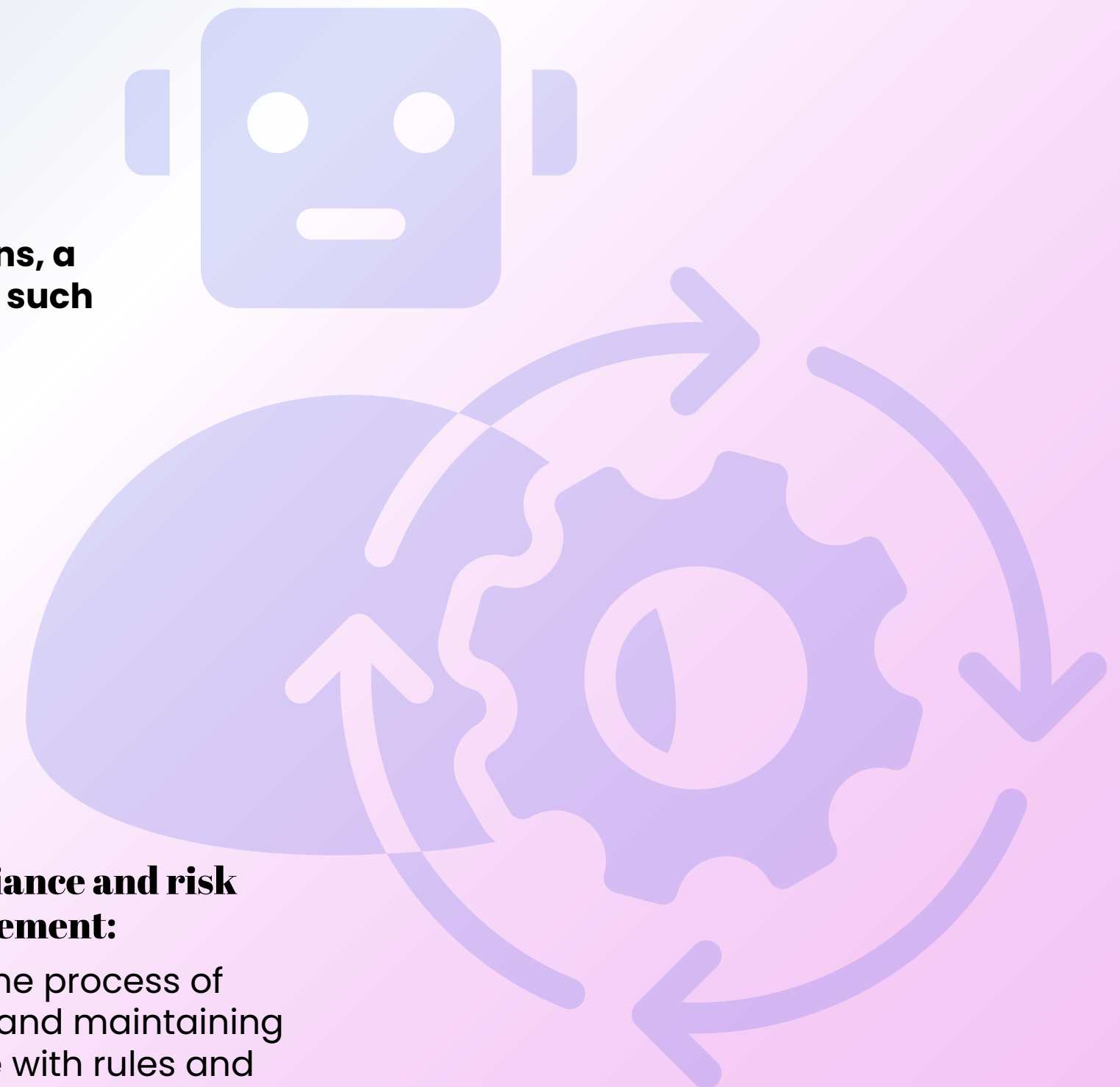
2 Different *types* of automation:

The type of automation chosen becomes a key for which door to choose. Let's look at some different types of automation. Here are some common types to consider:

Robot Process Automation (RPA)
Used to automate repetitive tasks and processes using software robots or "bots". These bots are designed to mimic and perform human-like activities on computer systems, such as clicking, typing, dragging and dropping, as well as communicating with other systems and applications.

Workflow Automation
Automates and coordinates workflows between different systems and users.

Integration Automation
Focuses on integrating various systems and applications to facilitate data flow between systems and provide a cohesive view of information from different sources.

Sales Automation
Automates the sales process by managing and following up on leads, sending quotes, and handling contracts, often in conjunction with Marketing Automation.

Business Process Automation (BPA)
Is an overarching term used to describe the automation of business processes in their entirety. It involves the use of various automation tools and techniques to streamline and automate processes within an organization.

Marketing Automation
Automates marketing activities such as email campaigns, social media, lead nurturing, and analysis of marketing results.

AI-driven Automation
Uses artificial intelligence to analyze data and make decisions without human intervention.

Customer Service Automation
Automates customer service processes by providing self-service options, automated responses to common questions, and handling customer issues.
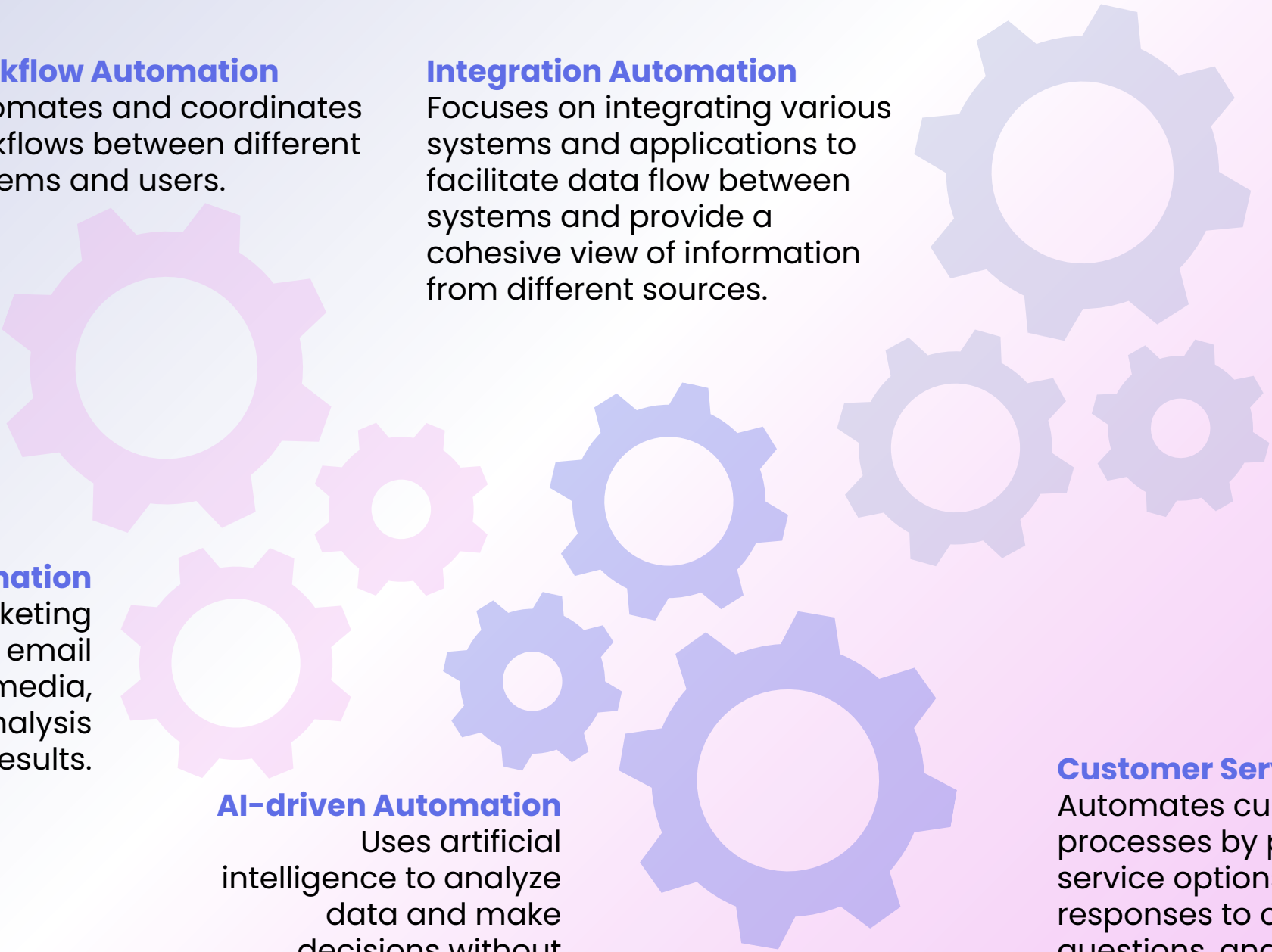
By choosing the right type of automation you can optimize your result, increase overall efficiency and maximize ROI.

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3 **Where** are these activities currently managed?

Is the information underlying what you want to automate already digital? Is the starting point and the rest of the process digital?

If the answer is no, you need to decide whether to transition to a digital way of handling all steps of the process or what will constitute the start of automation and how it will proceed. It's possible to combine a manually triggered start with both automation and manual elements, but opting for a fully digital process is preferable to achieve maximum efficiency and consistency.

If you need help digitizing your processes, see if it's possible to find a provider that can offer support for digitization.

We at
sweet
can help you

Manual

Automated steps   **Digital**

Some automated processes

Fully automated business processes
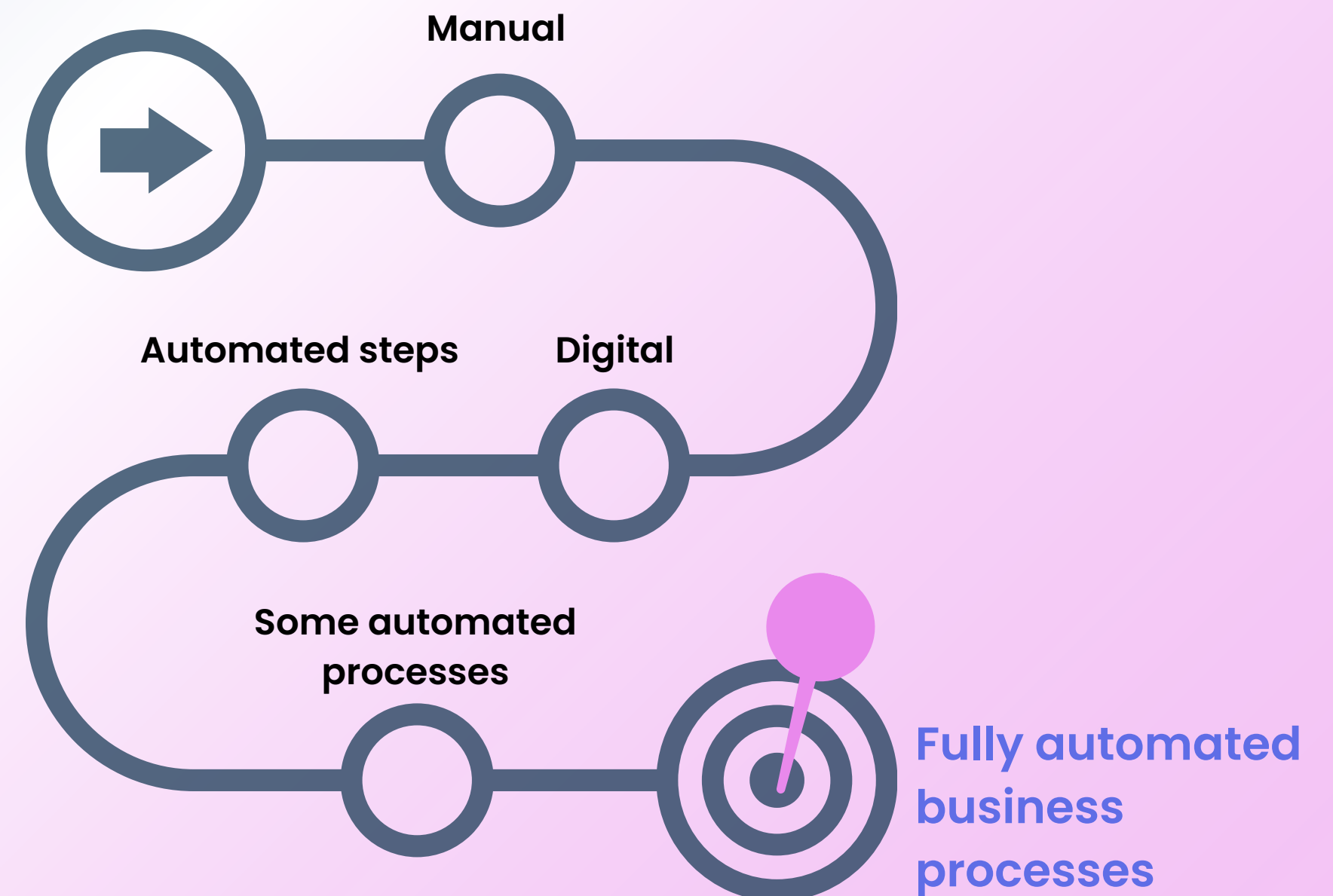
4 Which internal or external systems has to be integrated?

For digital activities or processes, it's common for activities to take place in different locations, such as activity on the website or web shop triggering a process that is handled or ends up in the customer database, order system, or ticketing system.

To achieve a seamless automated process, integration between these solutions is essential – and it's important for the automation tool to have integration capabilities, preferably of various kinds.

An automation tool that supports integration via APIs, direct database integrations, and can handle webhooks and message queues is preferable. As it stands today, not all systems have APIs available for integration, and other variants are necessary. Start by reviewing the capabilities of the provider and your own systems to determine the needs.

It's crucial to investigate the integration capabilities of the tool beforehand to avoid creating a lock-in effect that ultimately doesn't support the integrations you need.

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5 Resources for automation

Automating is a step in a change that also demands requirements from you as a buyer; your time and commitment are essential. Either in the form of creating your automation flows yourself or, as a client, specifying your needs for the provider to assist you.

You need to have a clear idea of how you want the creation and management to be handled, then choose a provider and solution. Additionally, you need to consider your infrastructure requirements. Where should the solution be hosted, and how should it be made accessible?

There are various parameters to consider:

A Who automates?
– us, the provider, or both?

B Where the solution is hosted?
– SaaS or On-premise?

C Price model
– Fixed or variable price?

A Who automates?

Do-It-Yourself-solutions (DIY):
- Several providers offer the possibility to create and maintain automated activities and processes yourself.
- Utilizes "low code" or "no code" principles for easier creation without deep technical knowledge.
- The level of support for more complex automation varies depending on the solution.

Consultation:
- Several providers offer consulting services to build automation, create integrations, maintain, and guide the work.

Suitable for organizations with internal resources and expertise who want full control over their processes.

Suitable for organizations that lack the technical know-how, interest or can't allocate resources to perform the work themselves.

Ⓑ Where is it hosted?

The hosting model determine cost and responsibilities.

Software as a Service (SaaS):
- The software is provided as a cloud-based service.
- No local installations required; accessed via a web browser with a subscription fee.
- Easier to get started with since all maintenance is handled by the provider.

Suitable for organizations that want to avoid technical complexity and focus on their business goals.

On-Premises Software:
- Some organizations prefer to retain control over their systems and data by purchasing and installing automation software on their own servers.

This solution provides a high degree of control and customization but also requires investments in hardware and maintenance.

Ⓒ What pricing model?

The provider's payment model is crucial for the pricing structure; it can vary from variable costs such as "per transaction," "per API call," or more fixed and predictable models such as price per software installation or license per company or user.

Try to form an early understanding of how many users you will have, what integrations you need, and which pricing model you feel most comfortable with. Many feel a great sense of security in choosing a provider with a fixed price to gain predictability compared to a completely variable model that can quickly exceed the budget if automation rolls on.

By exploring different types of automation solutions, organizations can find the one that best suits their needs, resources, and strategic goals. It is important to carefully consider factors such as user-friendliness, cost, flexibility, and scalability when choosing an automation solution.

6 What does the future need for automation look like?

While doing everything at once may seem tempting, it contributes to both a higher threshold to get started and higher initial costs. However, starting small by automating individual actions is a good plan that often involves learning and gaining insights along the way, which can be applied in continued automation efforts.

To ensure success in the automation strategy, it's crucial to choose a system that supports the long-term plan.

Additionally, there is an opportunity to achieve ROI on the investment, creating room for further development. Therefore, it is both smart and economical to start small with processes that are relatively simple but quickly yield significant impact or relief.

Once these are in place, it's easier to take automation to the next level, while also accumulating valuable insights for what constitutes a good next step. Just ensure that your choice of system supports the long-term automation plan to avoid unpleasant surprises along the way.

Calculate the ROI

**Before making a decision, make sure to calculate the expected ROI for the chosen automation tool.
Consider costs, time savings, and improved efficiency to determine if the investment is worthwhile.**

$$ROI = \frac{(Profit - Cost)}{Cost} \times 100\ \%$$

Many choose to measure, for example, the time spent on a process currently and try to estimate the time saved when automation is in place, to translate it into how much resources are saved or freed up.

By following these **6 steps**, you can ensure that you choose the right automation tool for your business and get a good return on your investment.

Good luck!

! Coach's Tips

Fredrik Gunnarsson, the godfather of Sweet Automation, explains why integration between your and other systems is so important:

- **Bridge the gap:** We bridge the gap between scattered data sources and ensure that all relevant information flows seamlessly between systems - for the user. It constitutes the core of automating business processes.
- **Start small, dream big:** Many integration initiatives start with specific tasks in mind, and Sweet Automation offers a holistic approach that allows you to grow and integrate your IT ecosystem, step by step.
- **Automate across the organization:** With integrated solutions, you can automate processes that are scattered throughout your organization. Say goodbye to isolated silos, departments, and fragmented workflows!

Fredrik Gunnarsson
Product specialist

sweet AUTOMATION

Sweet Systems offers a powerful automation solution for managing activities and processes, acting as an integration engine between systems, but also as a unified data source to make informed decisions based on data from various sources.

Here, it is possible to automate most types of processes:
Everything from sales work, marketing communication, ticket handling, and customer service processes to advanced decision-making processes. We help our customers daily to onboard their customers automatically, validate information against underlying sources, send reminders, emails, or notifications about important information, or communicate with their customers. Also, to sequentially perform activities according to given patterns. All thanks to the automation engine, Sweet Automation.

Our solution gives you the freedom to create automated flows yourself, but we also offer our consultancy services if you prefer. If you want to know more, please feel free to **contact us** for a free demo, **read more about Sweet Automation**, or take inspiration from, for example, **Nordnet's success story** where they automated their customer onboarding and saved several full-time positions.

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