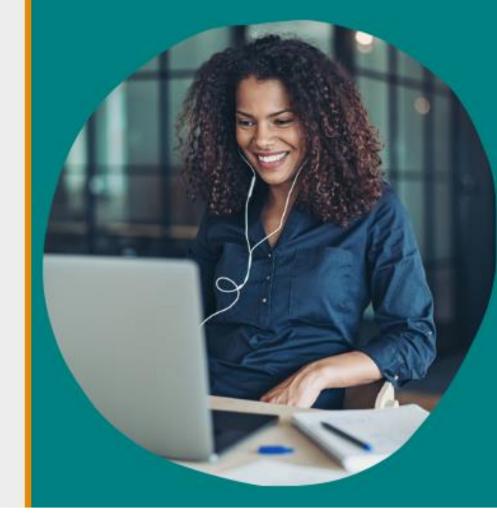# CHECK LIST TO FIND PROCESSES
TO AUTOMATE WITH RPA

CRITERIA FOR AUTOMATION

There are certain essential but routine tasks that may have low value but high costs. How can you distinguish if these tasks are good candidates for RPA? Well, you've come to the right place because there are 4 key characteristics in tasks that you should look for when identifying an opportunity for automation.

Repetitive - Tasks that are repetitive on a regular basis, mundane, or even tasks that make your eyes roll and those deep sighs hit.

Rule-Based - Tasks that are considered rule-based have a concrete set of rules that require simple choices such as yes or no.

High Volume - If the tasks occur in an extremely high volume, this is also a sign of being a good candidate for automation.

Prone to Human Error - The more manual a task is, the more prone to human error the task may be.

AUTOMATION EXAMPLES

The following are rule-based tasks that make great candidates for automation.

- Manipulating files and folders
- Launching and terminating apps
- Extracting data from documents with Optical Character Recognition (OCR)
- Querying databases

- Transferring data between systems
- Making calculations
- Typing text and filling in forms
- And more!

CUSTOMER SERVICE

- After-hours customer support
- Handling feedback
- Sending notifications
- Updating client's profiles
- Real-time updates on purchase status

FINANCIAL SERVICES

- Extracting billing information
- Processing financial transactions
- Invoicing
- Preparing data for audits
- Accounting reconciliation

HUMAN RESOURCES

- Employee surveys
- Onboarding
- Managing payrolls and benefits
- Handling compliance
- Time record validation

INFORMATION TECHNOLOGY

- Backups
- Data migration
- Automated testing of sites and applications
- Managing events
- Security and compliance monitoring

PROCUREMENT

- Order validation
- Purchase planning
- Processing of returns
- Managing contracts

SALES AND MARKETING

- Updating information in a CRM
- Campaign management
- Reporting
- Quoting
- Performing follow-ups and post-sale requests

The future of work is adopting an automation approach, but ensuring that it complements your workforce and eases their burden, freeing them up to focus on what they love. First we need to understand the processes that take the most time, evaluate and analyze the process and make tweaks as necessary. A bot is only as good as the process we secure around it. If it's a poor process, the bot will run a poor process. We will work with you to ensure we collaboratively identify the best process and then let the bot do its thing. Are you ready to explore your journey to automation?