

Bureaucracy must die

A beginner's guide
to workplace automation



Bureaucracy or your business: only one will survive

'Even companies that create innovative products rarely innovate when it comes to process,' says [Leslie Perlow](#).

Knowledge workers spend [an average of 41 percent](#) of their time on 'discretionary activities that offer little personal satisfaction'. Those processes are stealing time, money and motivation from your business.

Bureaucracy masquerades as a painful but essential part of business. For so long, it has been the only accepted way of handling processes like HR, purchases, communication and more. But while the processes might be necessary, the bureaucracy isn't.

This ebook exposes those hidden nooks and crannies where needless paperwork and mindless tasks lurk and shows you how a little automation can go a surprisingly long way.

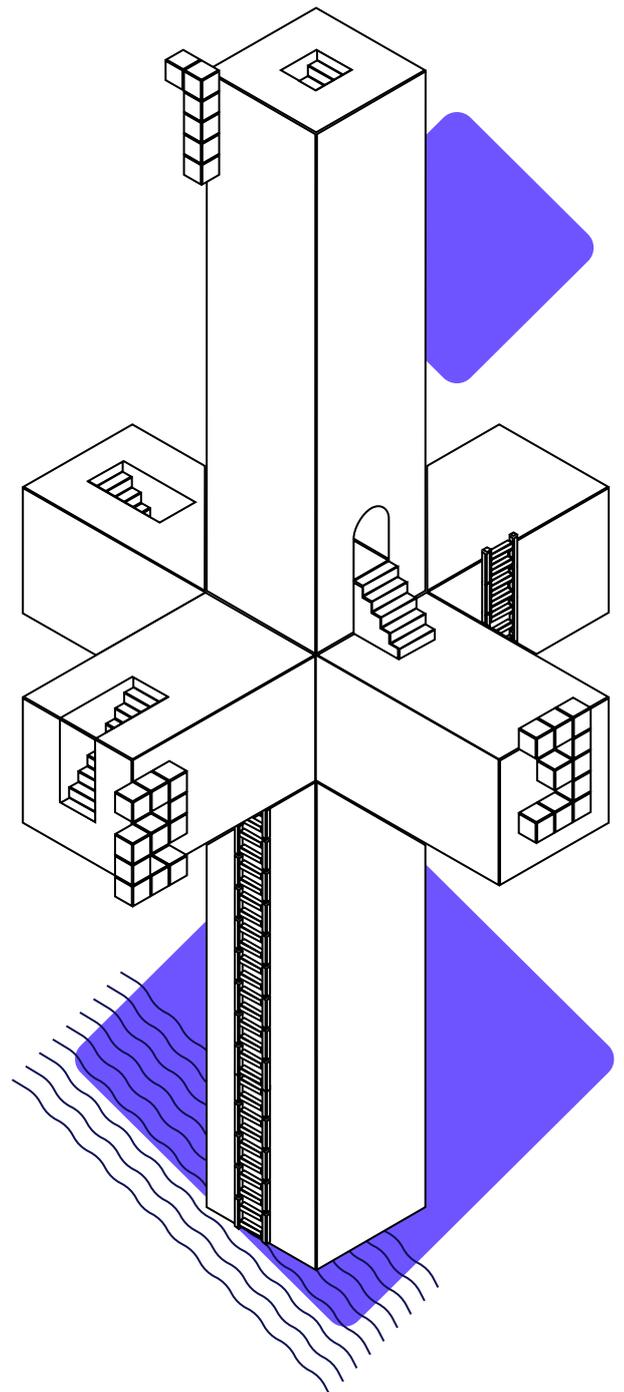
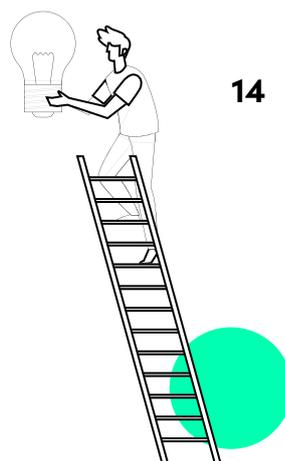
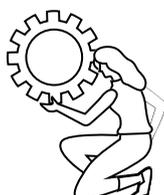
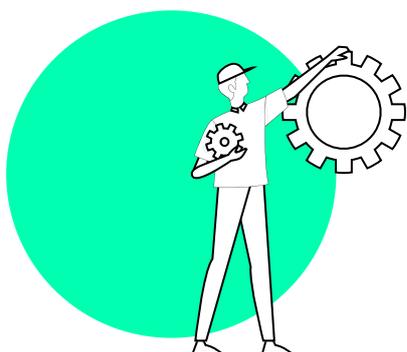


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Make time for what matters



'In today's knowledge economy, competitive advantage is increasingly coming from the particular, hard-to-duplicate know-how of a company's most skilled people...the goal is to redesign the role so that people are spending all their time at the high end of their skill set.'

This insight comes from a [Harvard Business Review \(HBR\) article](#) on redesigning knowledge work, but the argument is applicable well beyond just knowledge workers. Virtually every position in a company should be earning its keep, adding to revenue or growth.

Take HR, for example. The department has no direct contact with clients and no role in product development. It is, however, responsible for the growth of the company and its skill set. Company culture, training, development and talent retention are vital to the success of the company, and that's how HR earns its keep. That said, with so much bureaucracy, HR professionals rarely get to spend time on those tasks.

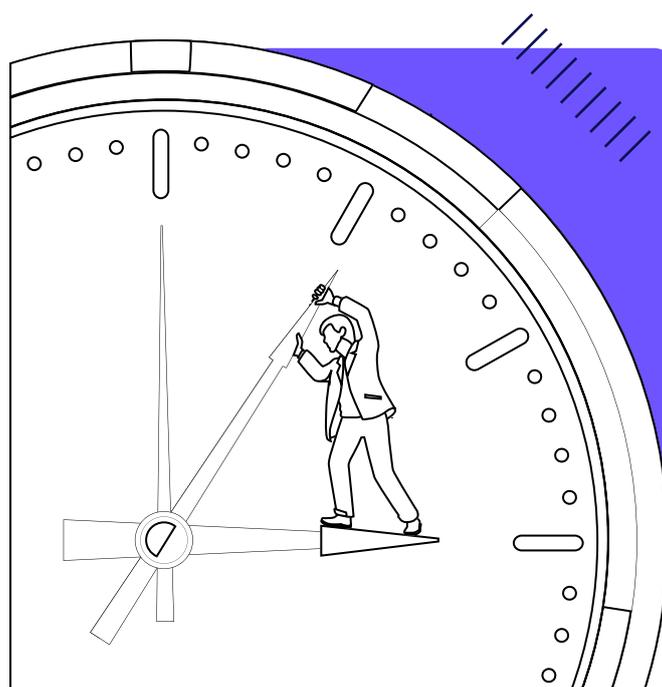
It is arguable that almost every person's role should be redesigned so they are 'spending vtheir time at the high end of their skill set.'

You can't make more time but you can increase its value

Time is money. It's an old saying, but a true one. Of course, any savvy business person should reply, 'how much money?'

Time spent filling in forms or answering emails is worth a lot less than time spent closing a sale or working on a client project. Many businesses, however, fail to make the distinction and are throwing money away in the process.

A few organisations do buck the trend and 'bring as much discipline to their time budgets as to their capital budgets,' say [Michael Mankins, Chris Brahm and Gregory Caimi](#). Such companies have identified low-value, high-time tasks and set very specific limits on them. They put approval procedures in place for any overspend, as you would a normal budget. Doing so has not only improved the productivity of individuals, but has initiated an organisation-wide shift towards greater efficiency and value.



Important vs valuable

Identifying which tasks need to be automated, delegated or eliminated is easy when you sit down, look at your to-dos and ask:

- What brings me personal value?
- What brings the company value?
- Am I the only one that can perform this task?
- Does this task even really need doing?

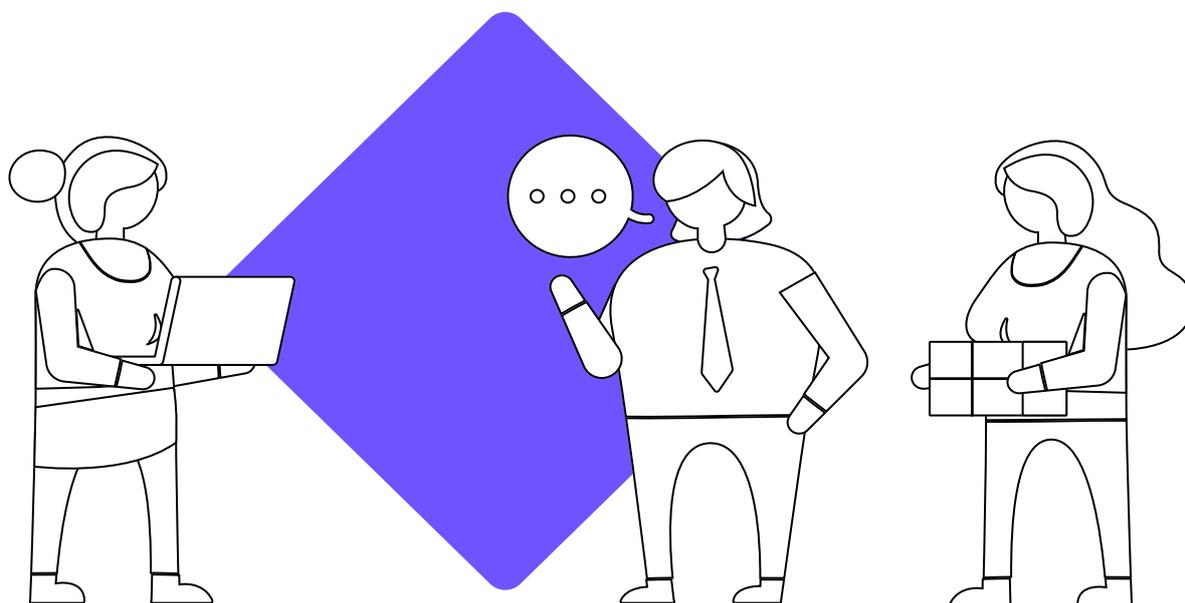
If you want a little help, the HBR even offers [an assessment tool](#) for figuring out what work matters.

Of course those that can be eliminated should be. Those that fall in the category of not high value to you or the business, but which still need doing, are ripe candidates for automation.

The next few chapters look at a few of the most common examples of these tasks and how to automate them and increase the value of your time.



HR and purchasing



Time off requests, purchase orders, expenses claims: they're all a massive time-suck. Reams of paper, unfathomable spreadsheets and an endless back-and-forthing leaves employees feeling disempowered, managers frustrated and finance or HR struggling to keep track of staff availability and budgets. HR and purchasing are perfect candidates for automation. So how's it done?

Important vs valuable

Software as a Service is the answer to many automation prayers. Online apps like Turbine offer ready-to-go services hosted in the cloud. They can be updated and accessed from anywhere and on any device. Turbine specialises in [purchase orders](#), [expenses](#), [time off](#) and [employee records](#), but there are other cloud services out there to complement it, such as payroll and accounting apps like [SageOne](#) and appraisal apps like [Small Improvements](#).

By automating the workflow of many common HR and purchasing processes, cloud apps like this offer several time-efficient benefits:

- **Centralisation.** All your information is in one place so when you take an action, a single version of the truth gets updated. Everyone knows where it is and can see what's going on at any time. Employees can check if a holiday request has been approved and finance can see if a purchase order item has been received.
- **Self-service.** Many apps, Turbine included, are self-service. This means only one person is involved at each stage of the process. No asking for forms, sending an email or updating a spreadsheet. Someone sends a request, a manager gets notified and approves (or not). It's all logged as you go so there's no updating of any databases necessary.
- **Accessibility.** Cloud apps let you access data from anywhere on any device – all you need is an internet connection. This means the little bit of time you still have to spend on administrivia can be done on the go and without delay.

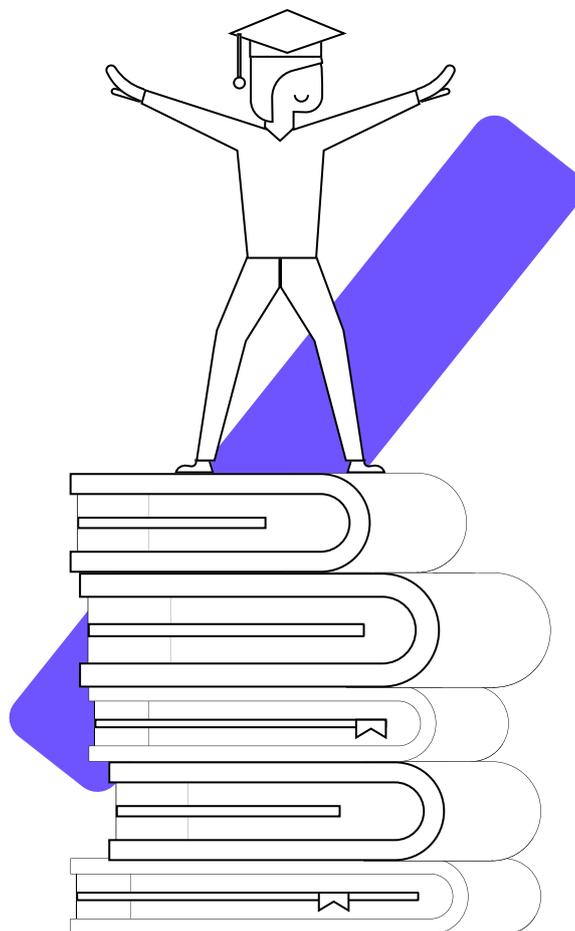


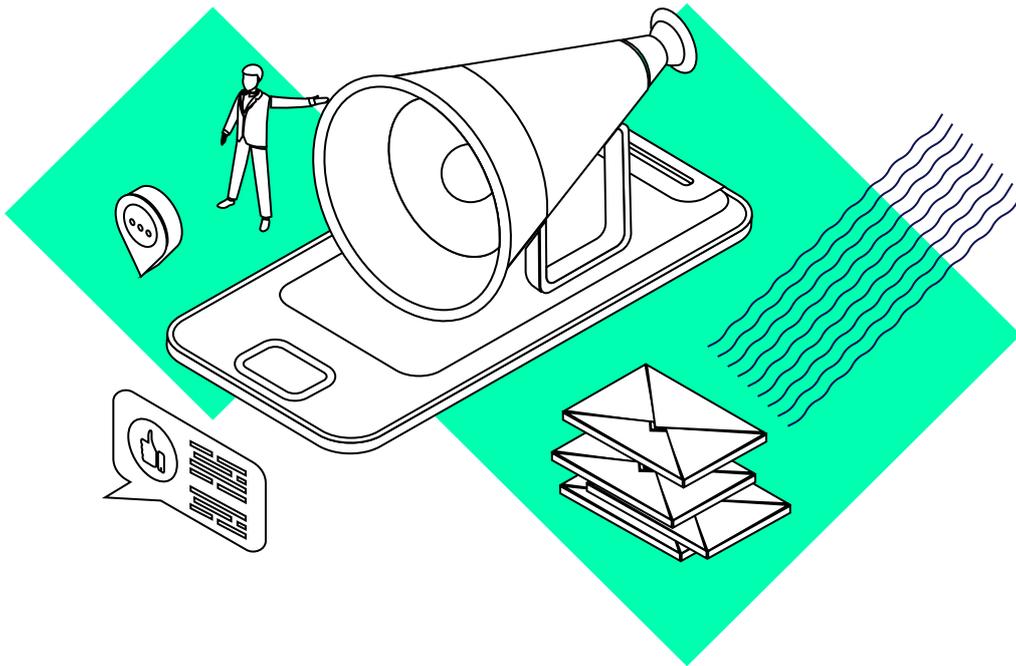
Knowledge is power

Beyond the immediate time-saving benefits of zHR automation, there are also more long-term perks that are great for your business.

Once you start automatically logging transactions, tasks like attendance monitoring and budget control become easier. Turbine, for example, lets you export data to help you track and visualise stats like peak sickness periods across the business. This way you can:

- Ensure consistency in expenses approval
- Prevent vendor over-invoicing
- Watch for burn out due to untaken holidays
- Reduce the risk of fraud or negligence with consistent audit trails and approval rules





Communication

Communication is vital – whether it's between teams, clients or one-on-one.

Keeping up to date with your team, knowing when a document has been updated or even just managing your calendar are all important, but these processes tend to take up more time than they're worth.

Luckily, there are a few tips and tricks to automate some of the drudgery and get straight down to the communication.

The basics

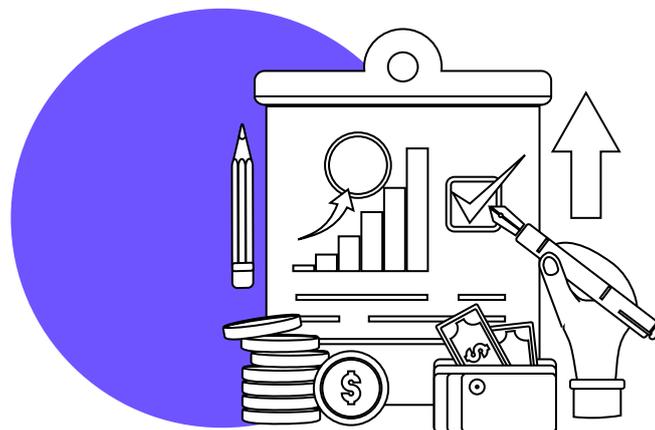
You can set up repeat meeting reminders for team catch-ups or progress-update calls with clients. Send the invitation out once, people accept once and it pops up in their calendar regularly. No messy back and forth every time.

Shared calendars mean people know when their colleagues are free for a chat or working flat-out to prepare for a client presentation. The [Google Apps](#) or [Office 365](#) calendars are shareable and kept up to date as long as there's internet access because they're hosted in the cloud. (Just FYI, [Turbine](#) syncs with your calendar to update any time off, too).

Progress reports

Knowing what your colleagues are working on and what progress they've made is incredibly useful. It can increase motivation and help them understand how their work fits into the bigger picture. On the other hand, meetings suck the life out of people faster than you can say 'calendar invite'.

- [iDoneThis](#) is a simple little tool that sends you a daily email asking 'what have you done today?' All you have to do is reply. You can just keep track of your own progress, or use the team setting to share it with your colleagues. A little automatic reminder can go a long way.
- [IFTTT](#). The If This Then That tool has all sorts of uses. One handy way we use it is to automatically post to Slack when a blog post goes live. We have a few writers from our sister company, Articulate, who write for the blog but they don't always know when their work will publish. This lets them and the rest of the team see their writing, without any need for human intervention.

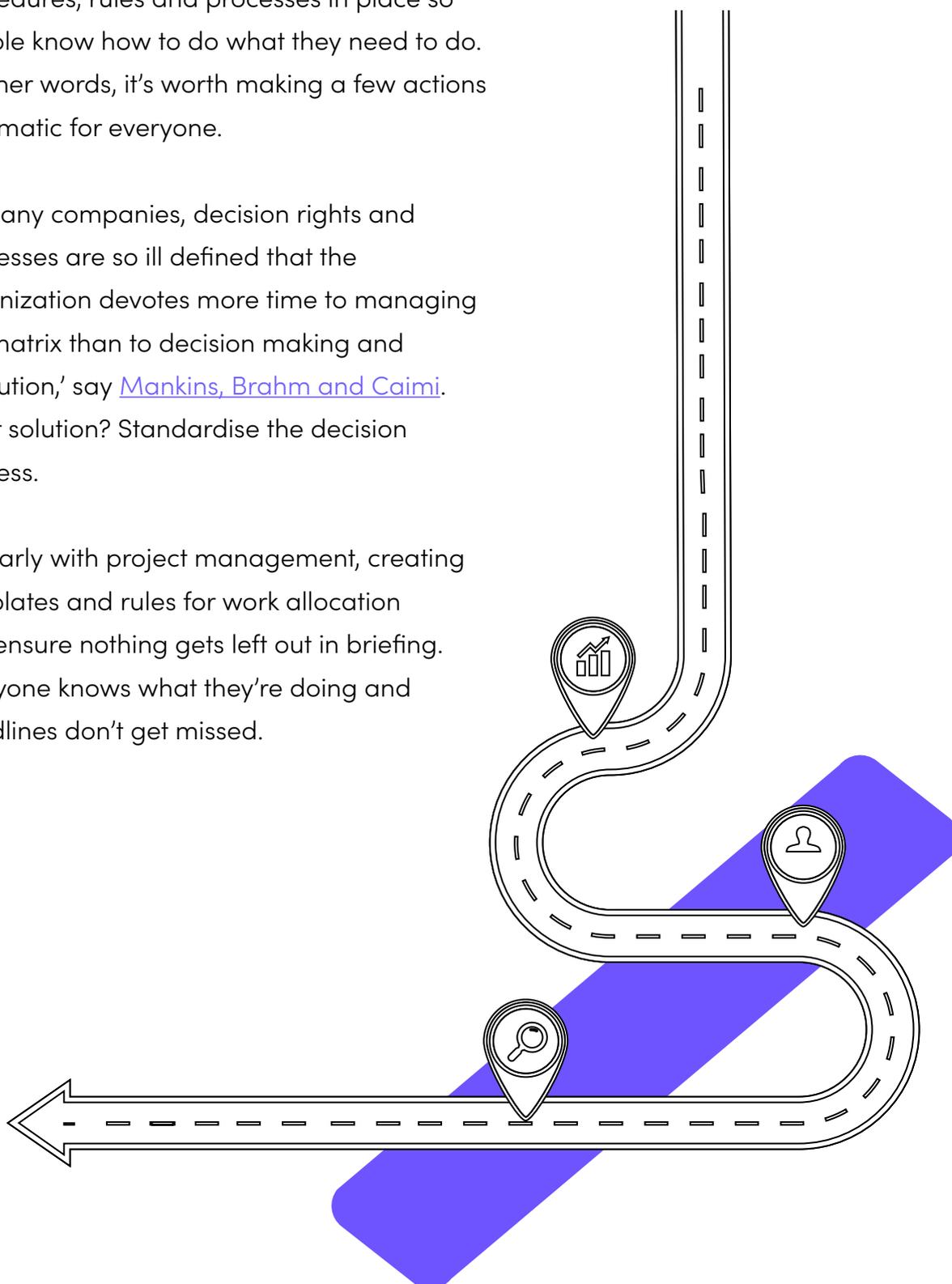


A few rules for good measure

We've already established that bureaucracy is bad. But that doesn't mean you shouldn't have procedures, rules and processes in place so people know how to do what they need to do. In other words, it's worth making a few actions automatic for everyone.

'At many companies, decision rights and processes are so ill defined that the organization devotes more time to managing the matrix than to decision making and execution,' say [Mankins, Brahm and Caimi](#). Their solution? Standardise the decision process.

Similarly with project management, creating templates and rules for work allocation can ensure nothing gets left out in briefing. Everyone knows what they're doing and deadlines don't get missed.





Marketing

You might not think of marketing as a hub of bureaucracy, but the ad-hoc processes do persist. They make for an inefficient sales funnel and potentially lost leads.

Switching from analogue to digital

Old-school marketing meant pushing out messages and hoping someone listened. Email blasts, advertising campaigns and one-sided conversations told customers what companies wanted them to hear.

Things are different now.

- [80 percent](#) of buying decisions begin online, usually by typing a question into a search engine

- The average buyer gets 60 percent of the way through the buying process before they are willing to speak to or engage with a salesperson.

Reviews, websites, social media and the pervasive mentality of 'Google it' mean that businesses can no longer control the messages customers receive, but you can still be part of their learning process.

Following customer footsteps

Much of a customer's buying decision takes place online, so there's an opportunity to see where they go for information and what problems they're trying to solve.

You can then build marketing campaigns tailored to a typical buyer journey that delivers useful content and nurtures them into a customer. Even after a sale, it's worth watching where the customer goes to continue delighting them.

This concept is known as [inbound content](#) marketing, which in itself isn't automated, but the tools you can use to deploy it are.

Marketing automation

There are many tools out there, such as [HubSpot](#) and [Marketo](#), which not only track digital footprints, but also link them together and store customer data. This allows you to categorise leads by behaviour and put them into automated workflows.

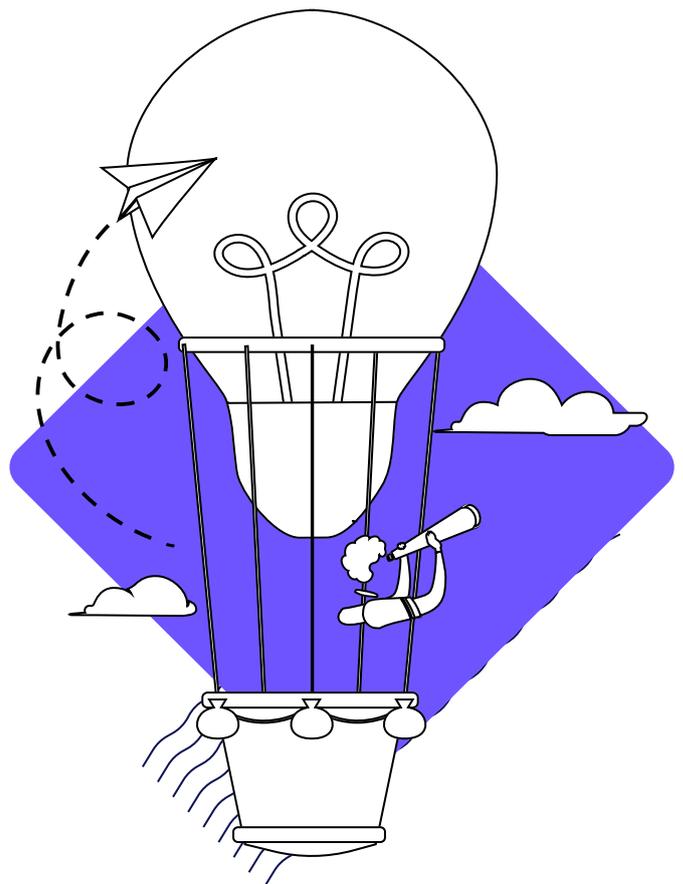
Say, for example, someone visits your website and downloads an ebook designed for CEOs of tech startups, one of your [ideal buyer personas](#). They fill in a lead-capture form, giving you a name and an email address at the least. They are then enrolled in a workflow for that particular type of buyer and will automatically receive tailored emails. Alternatively, the sales team will receive their details for a follow up call. 'The process is fine-tuned continuously in response to which leads convert into what kind of deals, to changes in the competitive marketplace and changes in the company's product and service offerings,' [explains David Tebbutt](#).

Better business

Marketing automation lets you focus on the most promising and appropriate leads, making your time better spent.

In larger businesses, this introduction of software into the marketing process is an opportunity for marketing and IT to work together. This collaboration increases the efficiency and growth of the business.

'If the CMO and CIO get their heads together and agree on what's important from both points of view, and harmonious with the company's goals and priorities, then they can go into an MA [marketing automation] purchase confident that both short-term and long-term objectives can be achieved,' [concludes Tebbutt](#).

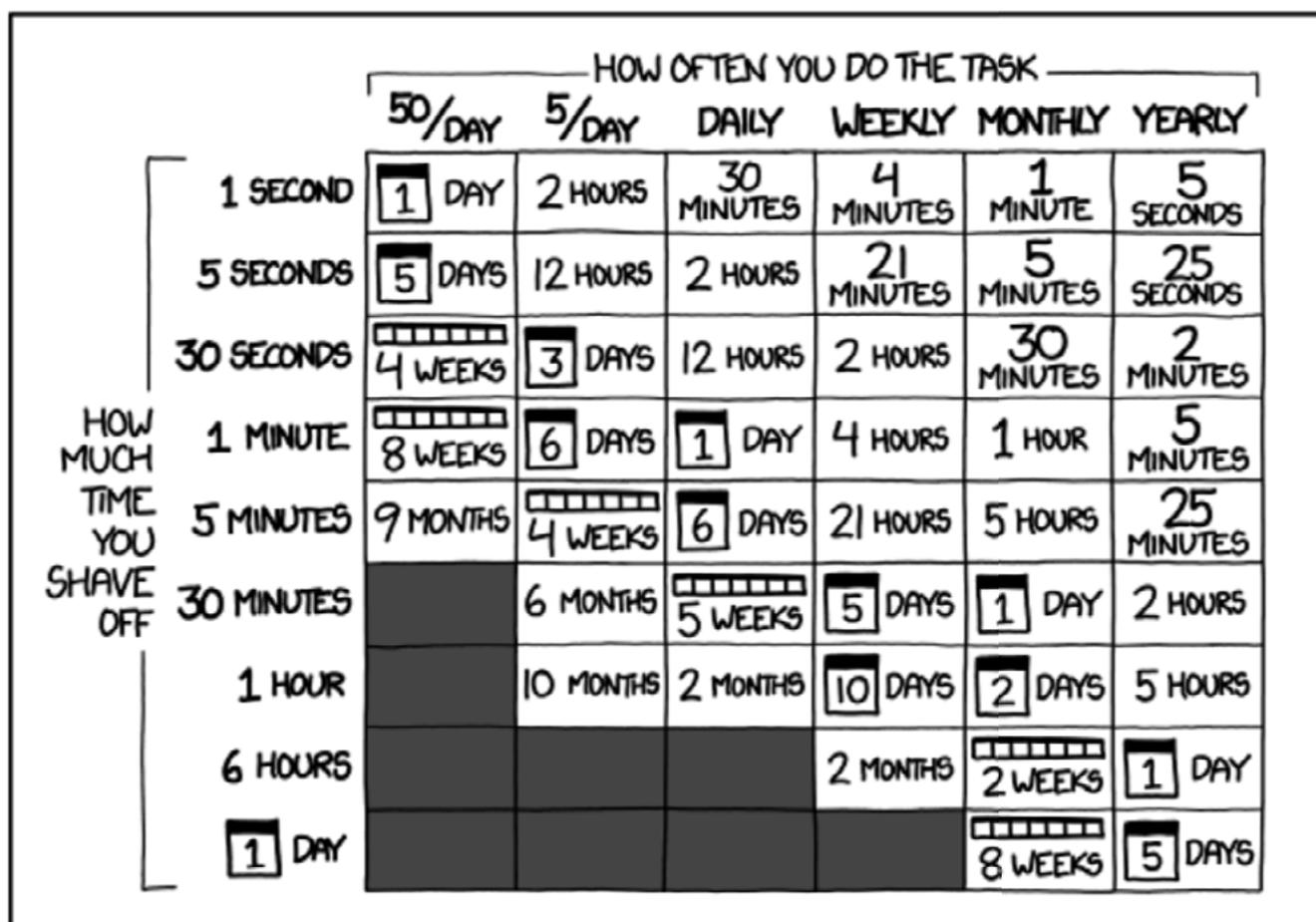


Admin

And so we reach those truly demotivating tasks that fill our working lives: administrivia. Every 'I'll just' and 'before I do...' adds up to a major productivity drain for you and your business.

'Is it worth automating such little tasks?' you wonder. Well consider this: eliminating a task that only takes 30 seconds, but which you perform ten times a day will save you six days over five years. Take a look at this graph from [xkcd](#):

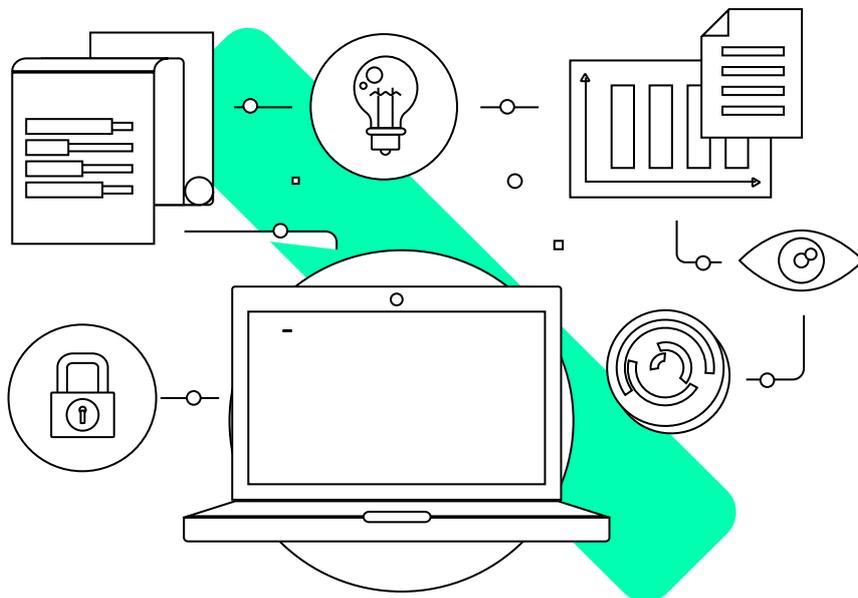
HOW LONG CAN YOU WORK ON MAKING A ROUTINE TASK MORE EFFICIENT BEFORE YOU'RE SPENDING MORE TIME THAN YOU SAVE?
(ACROSS FIVE YEARS)



Every second counts

Here are a few automated time-savers for earning those extra hours, days and weeks back:

- **Email.** Set up [some inbox rules](#). If the sender is x, move to file one. If the email contains keyword y, move to project file two. And so on. It's maybe an hour of your life to set it up, for a lifetime of automatic filing.
- **Backup.** Look in to cloud storage like [Dropbox](#) or OneDrive so saved files are automatically backed-up to the cloud. Cloud apps. A lot of apps now wirelessly sync across different devices. Take Evernote for example: add a note or clip a web page on your PC and access it later on your laptop or phone.
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- **Single sign-on.** When you're shopping about for new apps to use, look out for whether they offer single sign-on. You can log into Turbine, for example, using a Google account.

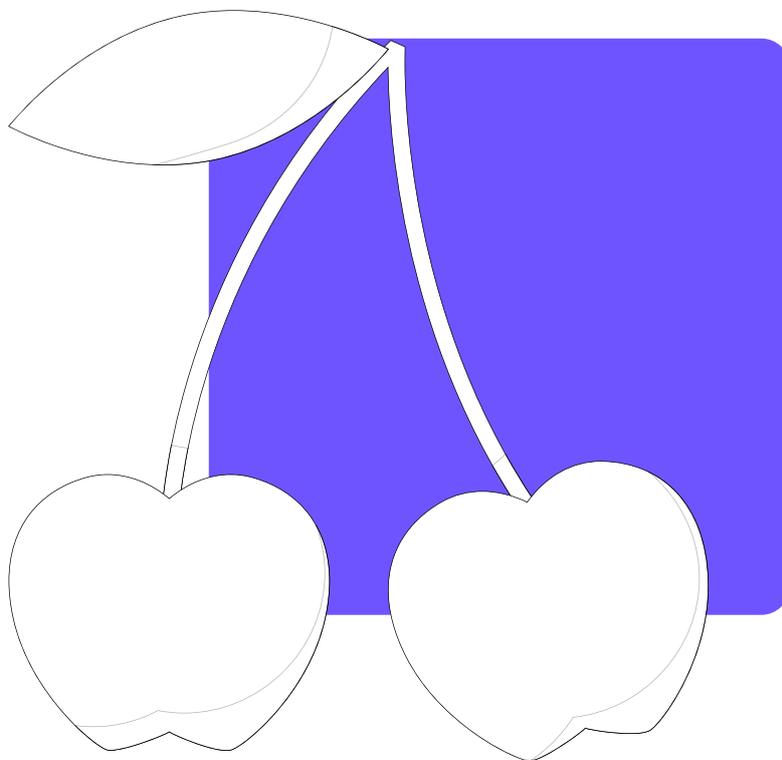


The cherry on top

Of course, if you enable automation through shared files and cloud syncing then you also enable mobile working. This allows people to work the way that's best suited to the task at hand. Once again, this increases the value of your time and theirs.

Nicholas Bloom, co founder of the Chinese travel website Ctrip, [ran an experiment](#) where he allowed half of his call centre staff to work remotely. 'It is estimated that it saved \$1,900 per employee for the nine months,' says Bloom.

Of course, mobile working is a whole other topic, involving a change in [how you manage employees](#), keep track of a [distributed workforce](#) and ensure you keep [everyone in touch](#). But automation is a helpful step towards an agile and ever-more productive company.



A little bit about Turbine



We love the paperwork you hate.

Instead of paper forms for purchasing, expenses and time off, Turbine lets you take care of everything online.

You can get control of spending, see exactly who's off and why and complete your admin any time, anywhere.

Why not [take the tour](#)? Or [get in touch with us](#) to see what Turbine can automate for you.

