A Beginner's Guide to Business Process Automation

Contents

Introduction

Business Process Automation (BPA) is rapidly growing among businesses all over the world, with McKinsey & Company conducting a global survey that found **70%** of businesses were piloting solutions to automate at least one of their processes. This had grown from **57%** in 2018, to **66%** in 2020, and to now **70%**, showing a substantial increase in the number of businesses looking to automate their processes.

What is BPA?

BPA is the use of technology to automate mundane repetitive tasks in an organisation. To fully understand what this means, being able to define a "business process" is key. A business process is a task or multiple tasks in a business that will accomplish an organisational goal. An example of this is the process of creating an invoice for an order. Automation streamlines invoices with ready-made invoice templates and organised client information, making the process much faster and easier for a staff member to complete.

Companies all around the world are adopting BPA due to the vast benefits on offer. Michael Georgiou has shared a statistic showing that **97%** of organisations believe that BPA is very important for digital transformation. With so many businesses now piloting BPA software, it is more important than ever to consider adopting software to remain competitive. This whitepaper will explore why BPA is so important and why it is becoming a necessity for businesses to remain competitive, drive growth and be profitable.

> We are passionate about empowering the adoption of business automation across industries and regions, worldwide. Our solutions are designed to significantly impact business topline and bottom line by improving time and resource utilisation, removing manual processes and human error, boosting productivity, driving sales and cost efficiencies. A significant number of businesses across the regions we operate, worldwide are yet to adopt business automation. And this remains our mission to help automate these businesses for growth.

Ashish Raina
CEO at TEBillion

> From both primary and secondary research we have found that many organisations within our target market are yet to adopt technology to improve their business processes. Many still use tools such as Excel and Google Sheets which can be limiting as businesses strive to grow and expand their clientele. It is our ambition to help these businesses maximise their potential and drive significant growth with business automation.

Noor Khan
Senior Marketing Executive at TEBillion

> Some key challenges that many businesses face with their sales include lengthy quote turnaround time, tracking leads and visibility of sales data. We speak to prospects daily and have helped many businesses overcome these challenges to gain powerful insights, push revenue and accelerate growth. We look forward to helping many more.

Akash Revo
Senior Business Manager at TEBillion

Business Process Automation in different industries

No matter the industry, BPA can be adopted to automate tasks to improve efficiency. Examples of multiple different industries in which BPA works brilliantly are manufacturing, healthcare, logistics, and electronics. These industries have adopted BPA and have seamlessly integrated it into their businesses to make their processes more streamlined.

Manufacturing

The manufacturing industry can automate a wide variety of processes, with the most notable being physical processes. For example, we can see machinery being employed to carry out physical tasks. However, manufacturers can significantly benefit from the automation of business processes too. With automation, manufacturing companies make their business more efficient by automating processes such as scheduling tasks like installing equipment or testing procedures.

Manufacturers use process automation for their operations which helps improve their workflow and reduce their manufacturing lead time while also improving operational management. As well as this, automation helps manufacturers keep track of stock accurately, allowing them to access important insightful information on processes such as inventory management. This results in manufacturing businesses making data-driven decisions to drive growth and profitability. Below are some of the processes which can be automated in manufacturing:

- Production management
- Supply chain management
- Inventory management
- Sales processes including lead and quote management

Healthcare

Healthcare has been an industry that has greatly benefited from automation in several ways such as reducing human error when recording patient information, streamlining administrative tasks and offering a better service to patients. Furthermore, administrative tasks can be automated for doctors, allowing them to focus more on treating patients rather than on time-consuming administrative tasks. This will result in patients having more time with their doctor, improving the outcome for both the doctors and the patients.

The management positions in the healthcare industry will also benefit from automation with streamlined easy processes. A report from Statista shows that in healthcare, **79%** of large healthcare organisations have reported that revenue cycle management was made a lot easier through automation, with **60%** also saying that supply chain management had benefited from automation. A list of some of the automated processes that the healthcare industry could benefit from:

- Appointment scheduling

- Patient data retrievals

- Patient data transfers

- Lead management

Pharmaceuticals

Meticulous Research shows that automation in the pharmaceutical industry is expected to grow to be worth **USD $18.2 billion** by the year 2029, continually getting more popular in this industry. Automation in the pharmaceutical industry allows businesses to significantly reduce costs, improve productivity and increase efficiency. Automation reduces the risk of human error and having to spend time and resources correcting a mistake. Furthermore, automation in the pharmaceutical industry allows companies to have better control and visibility over their inventory with live updates on stock, keeping businesses aware of any inventory management challenges that they face today in the future. This allows companies in the pharmaceutical industry to reduce the risk of these difficulties while providing a better service for their consumers. A list of some of the processes that can be automated in the pharmaceutical industry:

- Order management
- Packaging e.g. labels
- Inventory management
- Correct dosage calculation

Logistics

The automation of logistics has countless benefits that can be listed. Firstly, with CRM software with automation features, managing high volumes of order management data will become streamlined. Automation software manages and tracks the data for businesses in the logistics industry, reducing the risk of human error while saving time and resources. This is important for the logistics industry as 6 River Systems share a statistic that **62%** of respondents revealed that the number one reason for inventory fulfilment issues is human error. Logistics automation will also allow complete tracking of goods during transit, allowing everything to be tracked efficiently while enhancing the customer experience. The data that automation software collects, and presents is very beneficial data on transit times and client summaries which helps management reduce the chance of potential delays and missing packages. Overall, a business in the logistics industry would greatly benefit from looking into adopting CRM software that includes BPA. Here are some processes which can be easily automated by logistics businesses that will significantly improve productivity.

- Order management
- Inventory management
- Invoice management
- Get information such as freight rates in real time

Business automation in different departments

Manual management in departments across a business, including sales, marketing and HR can be costly in time and resources. Therefore, many businesses now are adopting automation software. McKinsey & Company have shared that now 30% of all sales-related activities can be automated, making more businesses interested in adopting automation software to help improve efficiency across all departments. Here we will look at how automation can help businesses in sales, marketing, and HR.

BPA in sales

Lead, opportunity, quote, order and billing processes can all be fully automated, allowing businesses to increase efficiency and productivity significantly across sales. The automation of the sales cycle can help in making connection time with leads speedy while capturing client information seamlessly. Automation software also allows team members to assign new leads and opportunities to other team members in a streamlined easy way, allowing sales teams to operate efficiently and collaboratively. This will help each deal be negotiated in a productive and streamlined way for both the business and the client, likely resulting in more deals being won. In sales, automation also helps businesses manage their information database, with data about clients being automatically stored and ready to be viewed by team members and management. With the adoption of software for sales, you are collecting data as you go in one central space, this can provide invaluable benefits to businesses including:

- Get a better understanding of your customers
- Re-engage lost opportunities
- Get a full insight into your sales journey
- Make well-informed data-driven decisions

BPA in marketing

Marketing departments can also find similar benefits to sales, such as a better understanding of your target audience to create personalised marketing content to drive lead generation. Additionally, BPA software will enable better collaboration between departments such as marketing and sales which sharpens the focus on achieving organisational goals. Some processes that can be easily automated within marketing are:

- Social media post scheduling

- Automated emails such as confirmation orders, specific event-based emails

- Campaign and project management

- Customer experience and gaining feedback
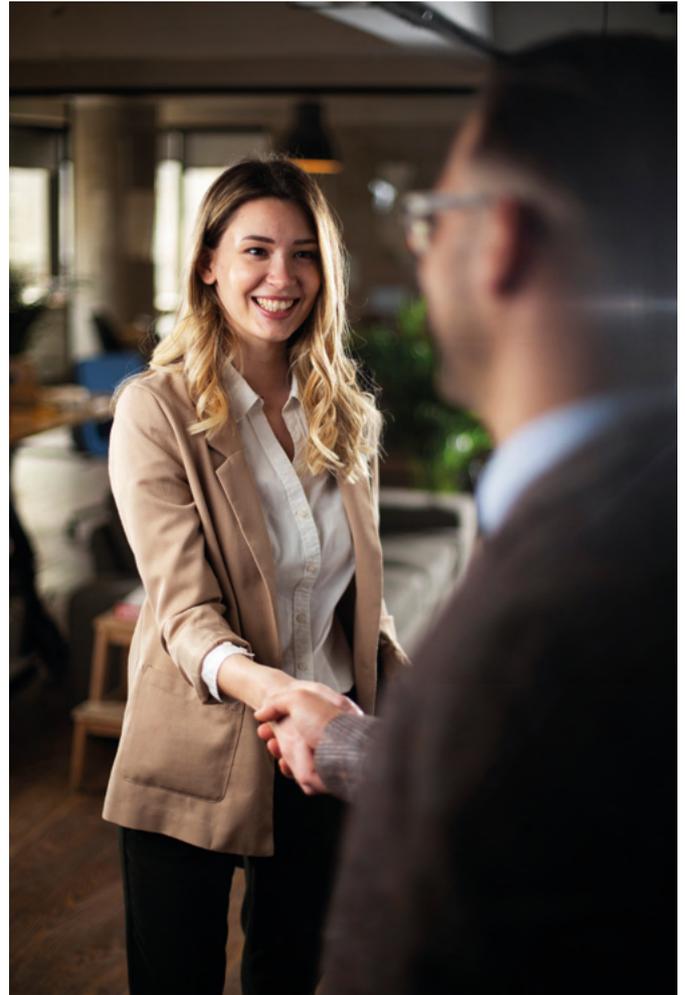
BPA in HR

HR automation brings benefits such as better efficiency and productivity in the department in many ways from the recruitment process to onboarding staff to managing staff holidays and absences. Automation of HR processes can enable the team to prioritise high-value tasks by mitigating the need for manual work. Some key processes that can be automated in HR include:

- Record management

- Contract management

- Holiday authorisation

- Onboarding process

Read the article on 8 things that your business can automate.

BPA vs RPA

Whereas BPA is a tool that is focused on automating a process that includes multiple tasks, Robotics Process Automation (RPA) focuses on the automation of just a single isolated task.

BPA focuses on streamlining multiple tasks in a process for a business that has an end-to-end process, for example, the sales process can be streamlined. BPA can streamline workflows at the process level. As well as this, BPA can support analytical data, making it not just an automation tool but also a tool for optimising, streamlining, and analysing processes and data.

RPA focuses on streamlining one individual task for a business rather than multiple tasks of a process. This is done through code that is programmed to complete specific tasks to mimic tasks that a human would do. For example, bots can read invoices and log into applications. RPA is generally used for tasks that are simple and rule-based like these. Although BPA and RPA differ in what they do for businesses, many organisations rely on both BPA and RPA to have their business running at its full potential.

Here is a table to summarise the differences in key features of BPA and RPA.

BPA	RPA
Automates entire end-to-end processes	Automates individual isolated tasks
Creates new applications and systems to automate entire processes	Applies automation to tasks within existing applications and processes
Reduces costs by re-engineering entire underlying processes	Reduces the costs and resources by employing robots
Increases efficiency across a business process by linking automated steps in a process together	Increases efficiency on an individual task with robotics automation

The need for business automation

BPA has multiple massive benefits for companies in every industry, making it very important for businesses to consider adopting it. The main benefits are reduced costs, a better customer experience, improved efficiency, overviews of data and higher employee morale. It is important to have a good understanding of all these benefits it can bring to your business.

Reduced costs

Firstly, a huge benefit that every business will experience with BPA software is a reduction in their costs by saving time and resources. The reduction in costs comes from automated processes in a business that would usually be done manually, saving time and resources for the business. Reduced costs will come from:

- Improved productivity
- Team members able to focus on high-value work
- Improved efficiency
- Reduction in human error

Better customer service

BPA enables businesses to provide smooth and streamlined customer service. Automation software enables you to have speedy and efficient communication with leads, increasing the chance of conversions. Additionally, all customer data is collated and stored in a centralized location which enables a better understanding of the customers' needs and requirements to enhance and improve customer service with a personalised approach.

Improves efficiency

BPA improves efficiency across the entire business. Processes will be automated in a business, reducing the risk of human error while allowing team members to focus their resources on other mission-critical tasks. As a result of this, a business's efficiency and productivity will be increased, leading to increased revenue and profitability.

Overview of data

Good BPA software captures, collates and centralises business data. This can provide businesses with invaluable insights to drive intelligent decision-making. Having access to collated data can help the leadership make investment decisions, plan business strategies and forecast and predict trends.

Higher employee morale

BPA helps improve employee morale by helping your team save time and remove repetitive, monotonous tasks from their day to day activity. This enables them to direct their attention to high value work. As well as this, a business will improve staff loyalty, allowing businesses to retain staff and reduce recruitment costs.

Implement BPA into your Business

To implement BPA into your business, there are multiple steps that you will need to go through to make sure you get the right software for your business to perform at its full potential. The stages that a business will usually go through when adopting automation software are; identifying the biggest business challenges, finding a suitable automation software, training employees to use the software and then tracking your progress.

Identifying the biggest business challenges

A business will first identify the challenges in their business that they are currently facing. For example, this could be a process that is taking a large amount of time and resources to complete. An assessment will have to be made on how this process hinders the organisation's goals, and how much the business will benefit from the automation.

Identifying an automation software

There are multiple automation software that a business can consider when searching for the right automation tool. Start your research with some baseline criteria such as:

- A simple-to-use software with a low learning curve that comes with support to help with any problems that may arise

- Software that can seamlessly integrate with existing business processes while giving all the benefits needed such as increased efficiency and productivity

- A cost-efficient software that is within the budget

Training employees to use software

Once the software is chosen by a business, now the employees will need to adjust and learn the automation software. Depending on the choice of automation software, this stage should not take very long, with employees being able to learn and adjust to the software quickly and happily. This will have a much higher likelihood of happening if the automation software chosen includes training for the staff, as well as support to make sure the teams do not encounter any problems.

Tracking your progress

Finally, the automation software will be embedded into the business and working efficiently, ready for the business to now start tracking the progress made with it. Businesses can monitor the performance of sales and teams by setting KPIs. Additionally, you may want to set KPIs to track the performance of the software and how much your business benefits from it. Some KPIs you might want to set include:

- Number of leads converted with the software (compared to the previous period)

- Number of quotes sent (compared to the previous period)

- Quote turnaround speed (compared to the previous period)

The key challenges of adopting Business Process Automation

Despite the many benefits of adopting BPA, businesses may face some challenges. Here are some key challenges and how you can overcome them:

The cost

The cost can be a challenge for businesses. Finding the right automation software that has all the necessary features a business needs while fitting into the company's budget can be difficult. Some automation software can be costly, with businesses possibly not requiring all the features included with the software, meaning the cost may not fit into the business's budget or be necessary because of unused features. With research into different automation software, this can be resolved as a business can choose the best software suited to them.

The adjustment period

Another challenge when implementing business process automation into a workplace is the staff adjustment period to the software. Depending on the software picked for automation, there can be a steep learning curve and the need for extra staff support to learn how to use the software. However, this problem can be solved by picking the correct business automation software that comes with support.

Compatibility with legacy features

Implementing BPA into a business to be compatible with your legacy systems can be challenging. When automating processes, you must be able to implement the automation software into existing business application processes which could be difficult and possibly incompatible when a business is using outdated applications. In this scenario, a business should consider updating its legacy systems as they are likely to gain benefits from better efficiency and easier workflows with the addition of further benefits from implementing automation software.
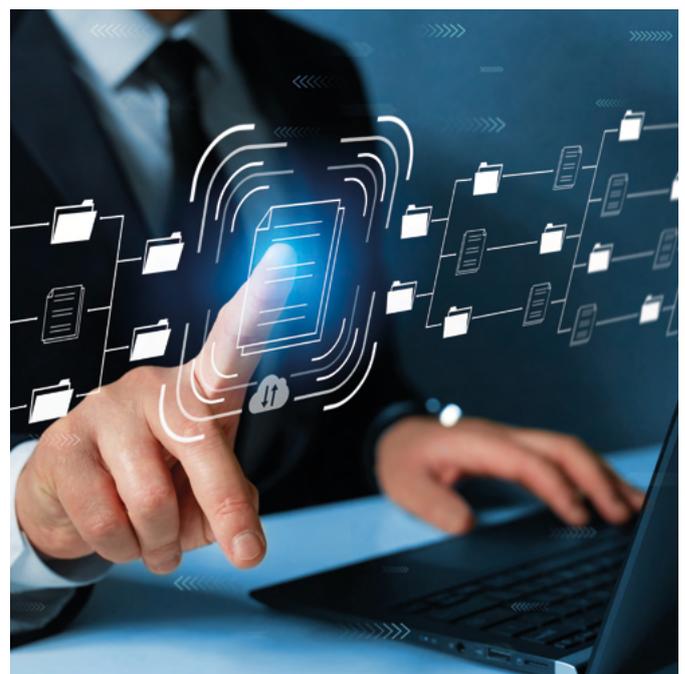
The future of Business Process Automation

The business automation market is everchanging with interesting data and speculations being presented about the future. Firstly, MarketsandMarkets have presented a statistic that the BPA market is expected to grow from a **USD 9.8 billion** market in 2020 to a **USD 19.6 billion** market by the year 2026. This substantial increase in the market value is because of a lot of different factors, from the growing number of SMEs to an increase in cloud adoption.

With a growing number of SMEs on the rise, we will see a rise in the adoption of BPA across industries and within multiple departments as business look to save costs and improve productivity. If a business does not adopt BPA, they may be putting themselves at a disadvantage.

Another reason why the BPA market is expected to continue growing at a rapid pace is because of the need for businesses to have optimised resource utilisation streamlined through automation. Businesses aim to be efficient as possible by optimising their processes to suit their business's needs, and automation is the best way for businesses to do this. Businesses can keep their processes personalised to them and their brand while still automating their processes and using their resources optimally.

We can expect to see a huge rise in hyper-automation for businesses, with a report from Prolifics stating businesses are expected to be able to lower costs by one-third by the year 2024. Hyperautomation consists of automating multiple processes for a business through AI to save costs, meaning now is the time to invest in business process automation to remain competitive.

TEB, The Game Changer

Business process automation adoption is growing year on year among businesses due to the invaluable benefits on offer. The future of BPA is beginning to shape in a way where it is becoming a necessity for businesses to stay competitive and perform at their maximum potential.
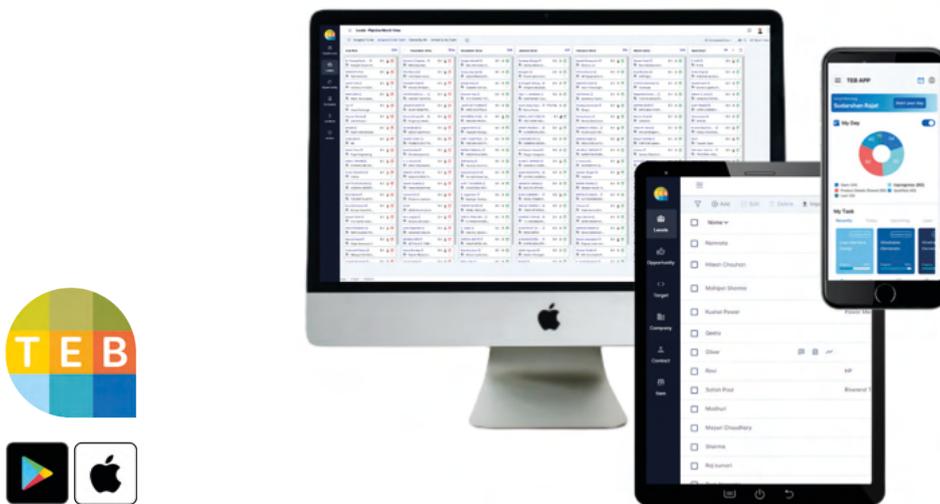
TEB, the business automation software automate sales to streamline your entire sales cycle from lead through to billing, increasing efficiency and productivity across the business. TEB enables granular-level customizability from workflow stages to customisable filters. Accelerate growth with TEB and its winning features including:

A user-friendly interface – Easy for teams to adjust to the software

Cost efficient – Pick the TEB package you need to suit your budget

Fully customisable – Customise TEB to suit your way of doing business

Kanban-style pipeline – Easily drag-and-drop pipeline cards to move prospects through the sales cycle

Storyboard feature – Get a full overview of each customer journey

Data reporting and analysis – Make data-driven, well-informed decisions with TEB's intelligent built-in data engine

The following are just some of the benefits our customers are gaining with TEB, and you can too:

Speedy lead communication to maximise conversions

Quick quote turnaround to get ahead of competitors

Fast-track ROI with data-driven decision making

Facilitate collaboration

Improved productivity with teams focusing on high-value work

See TEB in action at a time that suits you to drive growth, accelerate ROI and boost profitability.
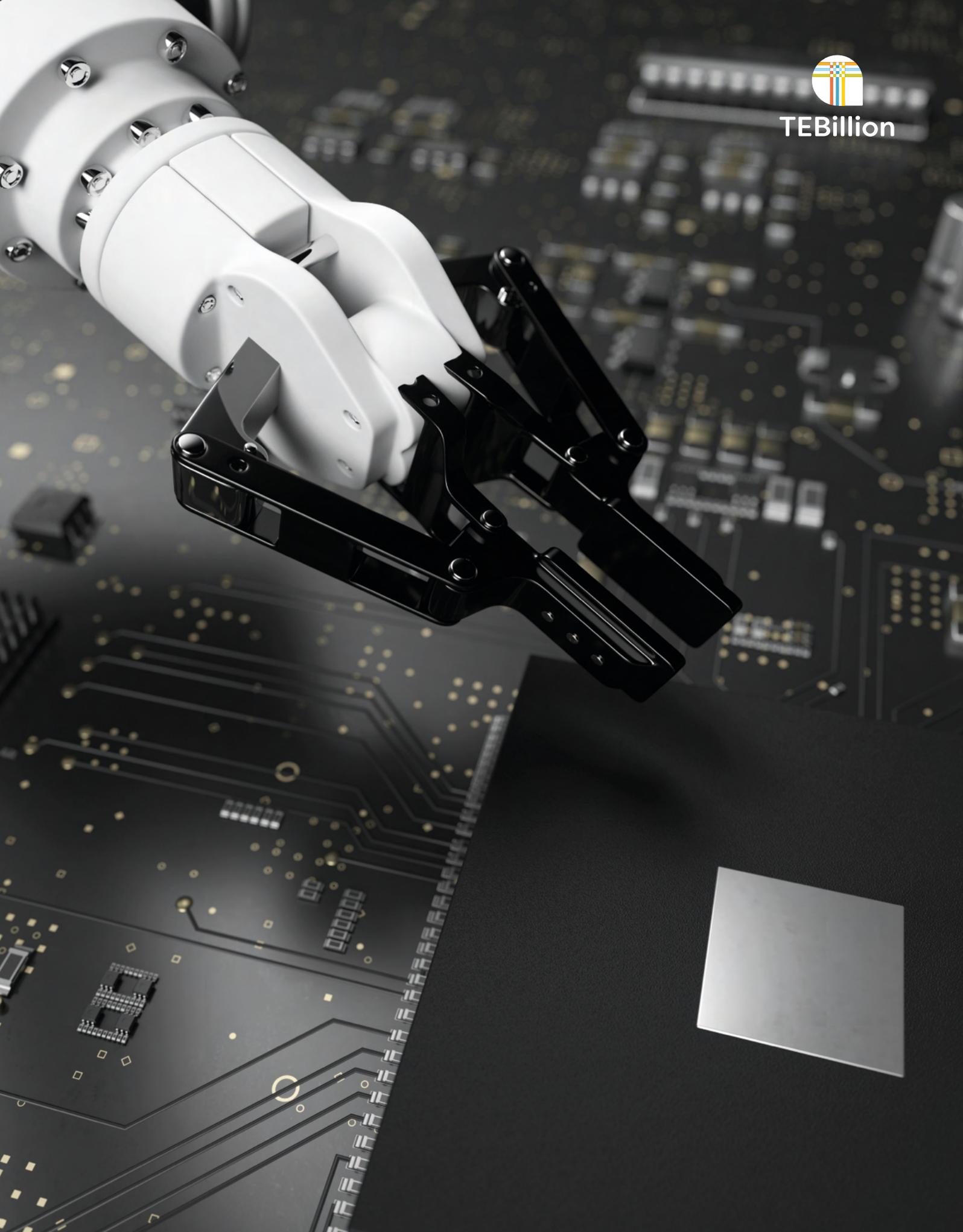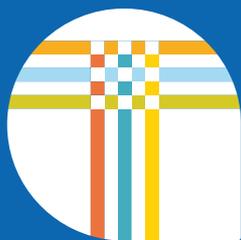
TEBillion

Technology for Intelligent Enterprise

Book a demo

Get in touch

Website: www.tebillion.com

Email: sales@tebillion.com

Address: TEBillion UK,
723 Capability Green, Luton,
United Kingdom, LU1 3LU

TEBillion

tebillion

TEBillion

tebillion