Automate Quickly Without Losing Control

Doing More With Less

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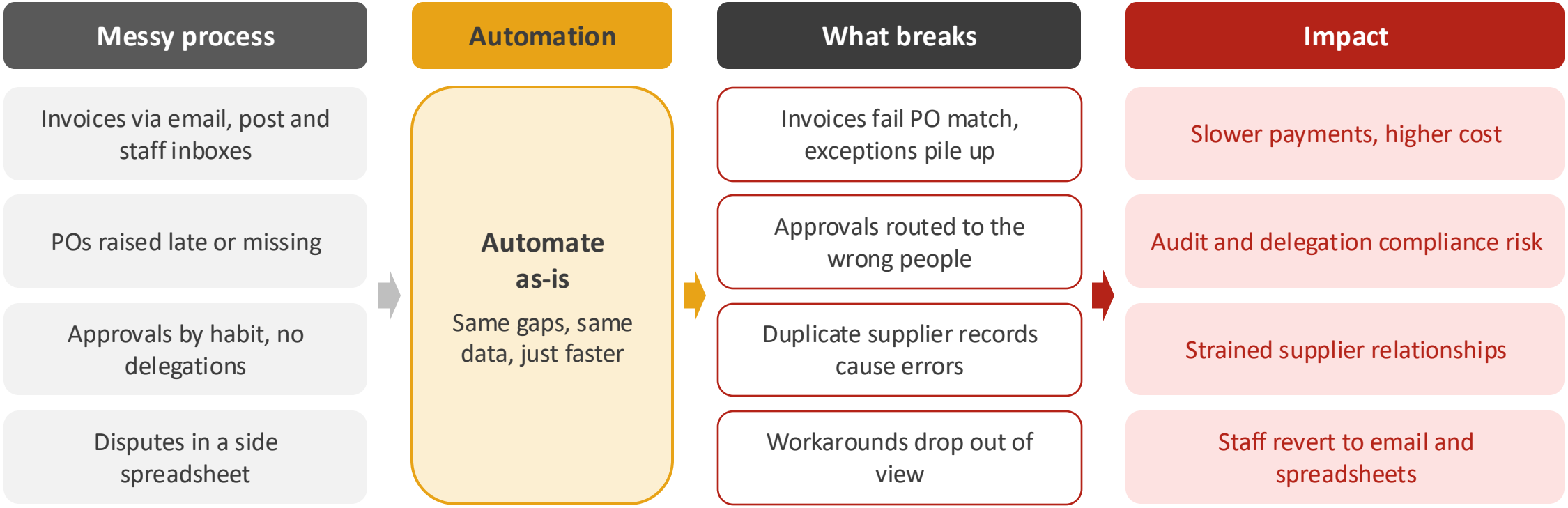
Welcome: Lunch and Learn



- Dialogue
- The recording will be available on our website
- Introductions

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Automating the Messy Process As-Is



Automation multiplies whatever it is applied to, including the mess.

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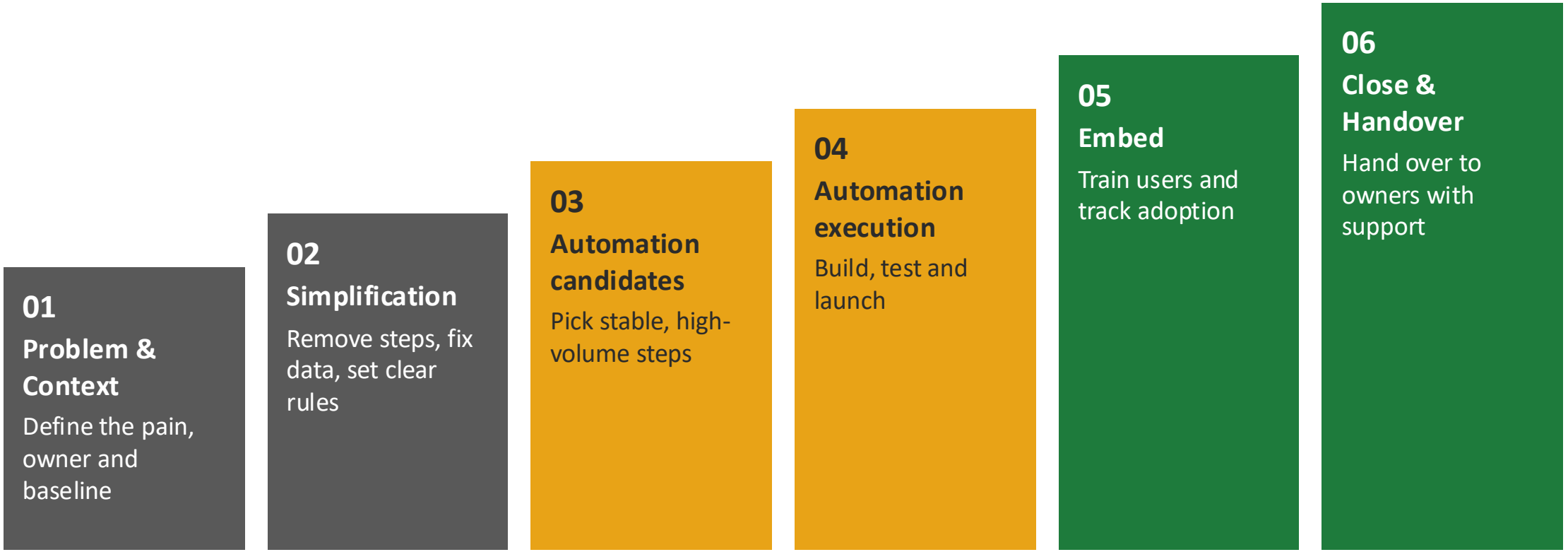
Automating the Simplified Process

Simplified process	Automation	What works	Benefits
One invoice inbox for all suppliers	**Automate the clean process** Clear rules, clean data, done faster	Invoices auto-match to POs	Faster payments, lower cost
POs raised before every purchase		Approvals reach the right people	Audit-ready, delegations enforced
Clear approval delegations		One record per supplier	Stronger supplier relationships
Clean, single supplier list		Every step visible in the system	Staff handle exceptions, not admin

Automation multiplies whatever it is applied to, including efficiency.

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Automation Ladder



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How to Simplify?



Eliminate

Options, scenarios, edge cases, exceptions



Allocate One Owner

One owner each for Data, Process, System



Master Data

One source of truth: Customers, Employees, Inventory



Improve Process

Limit decision loops and jumping of flow between teams

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How to Simplify?

Example: simplifying invoice approval before automating it (illustrative)

Simplify lever	Before	After
Eliminate	7 invoice types and 12 approval exceptions	2 invoice types; every exception goes to one queue
One owner	IT, Finance and Procurement each patch parts of the flow	Finance owns process, Procurement-> data, IT-> system
Master data	Same supplier entered 3 times by different teams	One supplier record, maintained by Procurement System
Improve process	Invoice bounces between AP, buyer and manager 4+ times	One pass: match, approve, pay

Result: a short, owned, clean process that is ready to automate

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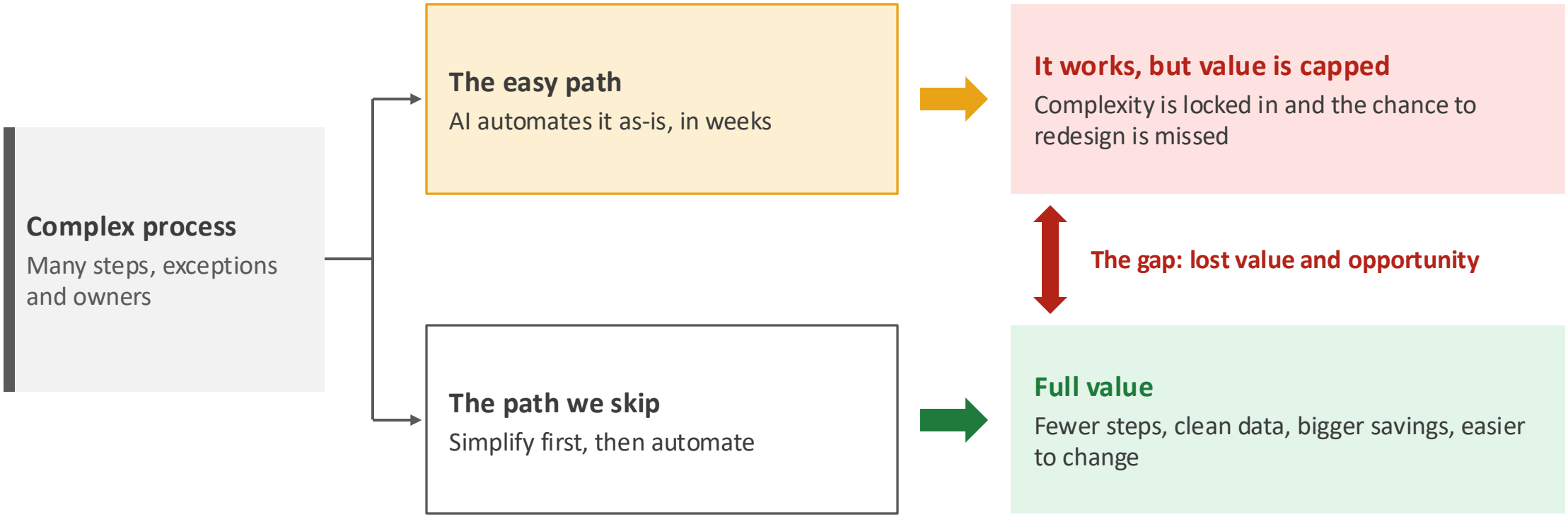
Power of AI

Automating a simple process vs automating a convoluted process

	AI on a simple process	AI on a convoluted process
Example	AI reads invoices from one inbox and matches them to the purchase order	AI reads invoices from five channels, with missing purchase orders and ad-hoc approvals
Value	**High:** most invoices post untouched; staff review only exceptions	**Low:** AI guesses at the gaps, so people recheck most of its output
Pain	**Low:** clean data and clear rules make AI output easy to check and trust	**High:** wrong matches and wrong approvers multiply faster and are harder to trace

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Risk: It is so easy to automate complexity that we skip simplifying



Because complexity is now cheap to automate, simplification gets skipped, and the value goes with it.

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Use AI for simplification

How to use it

1 Copy the prompt into your AI assistant

2 Replace the [brackets] with your process

3 Review the before/after with the process owners

4 Automate only the simplified process

Prompt

Act as a process simplification coach. Before we automate [process name], help me simplify it:

1 Problem: summarise the pain, the owner and the baseline (volume, time, cost).

2 Eliminate: list options, scenarios, edge cases and exceptions we can remove.

3 Owners: name one owner each for the process, the data and the system.

4 Master data: find duplicate or unowned records (suppliers, customers).

5 Flow: show where work loops between teams; redesign it as one pass.

6 Automate: rank remaining steps by volume and stability; flag what isn't ready.

Return a before/after table and the simplified steps. Current process: [paste steps, volumes, exceptions]

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How do we know if we are simplifying?

The test		What good looks like (invoice example, illustrative)		
1	**Measure before and after** Track the numbers, not opinions	**18 → 7** Steps	**12 → 4 days** Cycle time	**30% → 8%** Exceptions
2	**Ask and seek feedback** Users, approvers and suppliers	Approvers say “I see fewer, clearer requests”; suppliers stop chasing payments		
3	**Explain it with ease** The one-page test	A new joiner explains the process on one page, in two minutes		

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It is not easy

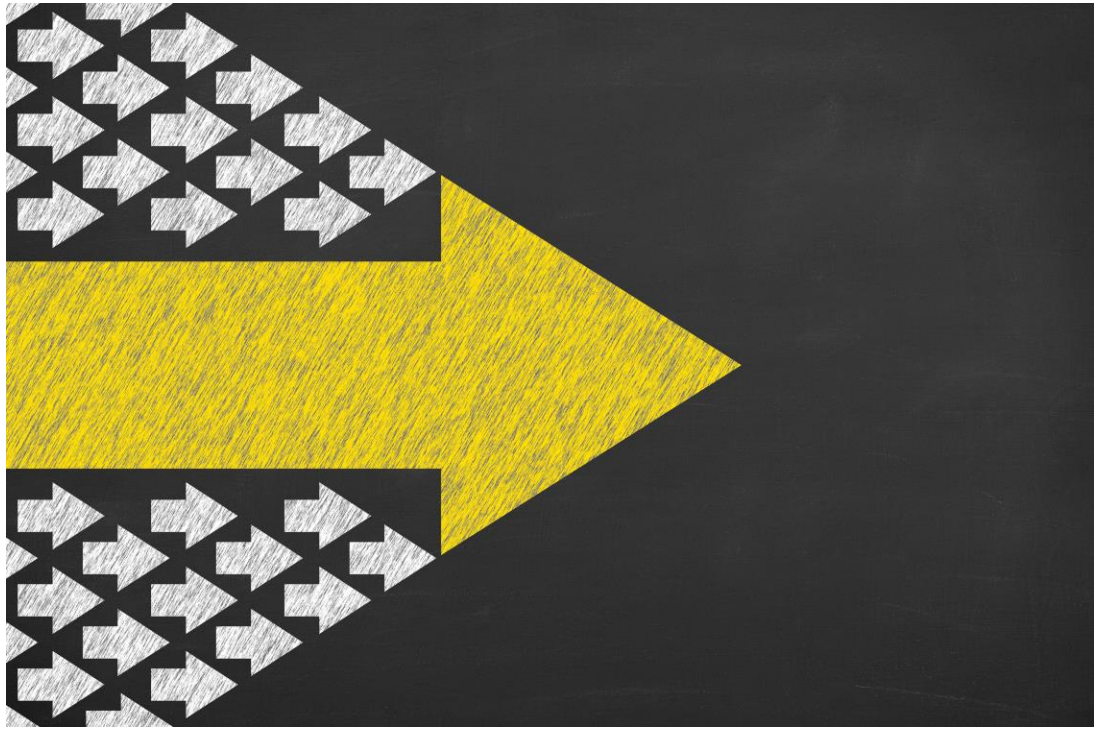
Change	Politics	Biases/“Waste of time”	The right thing to do
People prefer the familiar way, even when it is slow **How to get past it** Show the before/after numbers	Teams guard their steps, data and budgets **How to get past it** Agree one owner each for process, data and system	Pressure to skip straight to automation **How to get past it** Point to the value lost by automating as-is	**Fewer steps** **Clean, owned data** **Automation that delivers full value** *Worth the effort, even when it is hard*

The simplification journey

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Closing thoughts

- Automation is a part of process Improvement
- It is not about tools, it is about discipline
- Develop a process and framework and seek endorsement before execution



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