



Save Time and Work Smarter with Workflow Automation

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Automation is everywhere. Complex, tedious tasks that would take hours or days can now be done in just a few short clicks thanks to automation. Luckily, it's not hard to find software that won't break the budget. The right automation tools are also data driven to give you the most optimized processes possible.

When you've been used to doing something a certain way, especially for years, it can seem more complicated to change or automate that process. While they may come with a slight learning curve, workflow automation tools have become so user friendly that you'd see the benefits almost immediately. Automation can maximize your time and efficiency and propel your business in the right direction.

You'd be surprised to see just how much time and money you could save with a workflow automation tool. Let's take a look at some common automation applications that you may not have heard of.

Document Creation

Building an everyday document from scratch is a waste of time. Even a template doesn't go far enough when you have automation available to you. If you know what documents you typically need to create and have past paper or digital copies, you can easily create automated digital documents that you can find at the click of a button. Add in a few customized fields, and voila—something that took 30 minutes now takes two. Depending on the action that was taken, your workflow solution can also pull up the correct document just by knowing what specific task you are working on.

Accounts Payable

Don't lose track of an invoice or customer's invoice history ever again. Automate the process so you can track your invoices, push them to the right person, and help you remember when to send another invoice or reminder to purchase. This is also a great way to keep track of data—the more you have, the better!

Compliance Requirements

Many industries have complex compliance requirements that need consistent adherence, which can be a daunting task—especially if

compliance requirements change frequently or if there are too many of them to follow. Your automation software can be programmed to know your requirements inside and out, giving you notifications when something is noncompliant or when new documents or training are required.

Human Resources

Hiring a new employee means sifting through stacks of paperwork. A workflow automation can be set up to provide your HR staff with the exact documents they need at each stage of the onboarding process. A new employee comes into the system, and they're pinged with each payroll, contract, and other documents your company needs so that nothing is missed. Automation can also help HR managers maintain performance notes and other yearly review information in one easy-to-find system that helps them better manage employee productivity.

Task Management

Everyday tasks can easily get lost in the shuffle. With a consistent, automated reminder of what needs to be done, you can be sure that tasks are not accidentally getting missed. If an employee is sick, their tasks (such as customer service requests) can be programmed to automatically push to another employee who is clocked in, without any need to manually check or delegate individual tasks. Automating task management is one of the best ways to win back your precious time.

Data Collection

You receive hundreds of emails a day that you leave sitting in your inbox. Do you know how much data is waiting to be collected? Automation programs can be written to save information from each email you get. For example, the program could save a name, the sender's invoice, their product, the date, their contract, and more. You can use this data to send re-engagement emails or reminder emails

about payments or contracts coming to an end. This is one of the best ways to help your company retain customers longer.

Final Thoughts

The truth is that we haven't even scraped the surface of all that a workflow automation tool could do for your business. For every unique industry and need, there is an automation tool that could save you time and money in your everyday processes.