

Breakout Session 3

Work Automation: Getting faster and more organised with Templates & Request Forms

Mark Rudden,
Sales Manager Wrike



Benefits of Automation

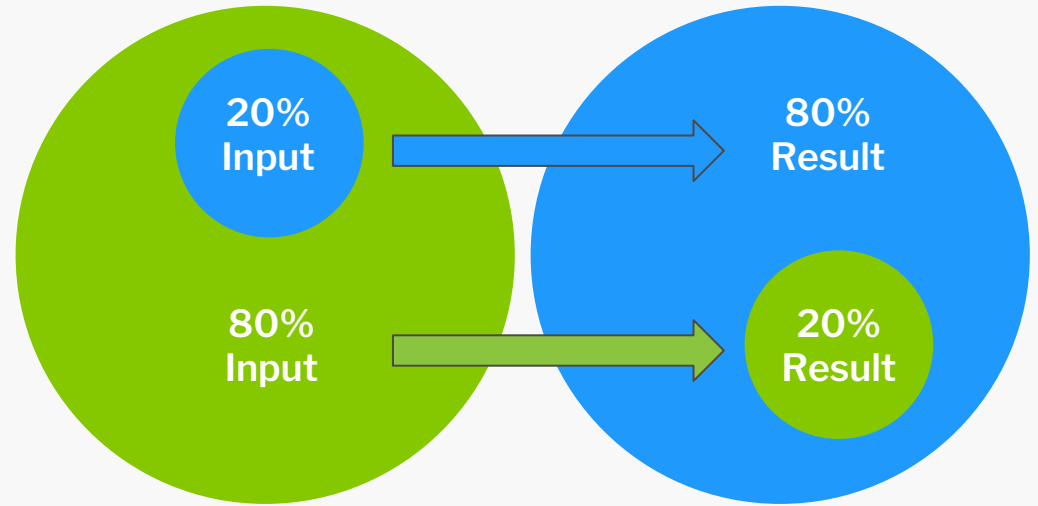
- Accenture forecasts 30% to 40% gains in employee productivity gains in the next three to five years as a result of automation.
- Eliminate repetitive manual tasks.
- Create accountability
- Decrease the chances of things falling through the cracks



80:20 Rule

Work can be operational or projectized. It can be simple or complex. Hone in on work that is **collaborative**.

Look for repeatable processes to help give process definition, make it easy to start work, and improve performance by reducing errors and improving speed.



Time is a Precious Commodity - Where to Start?

- Simplify the process of starting work. Create 1 avenue to accept project or operational requests from the team.
- Remove team members from the role of trafficking so they can focus on execution.
- Methods of Intake: Request forms, Production Schedules, Strategic Plans, Monthly or Weekly recurring operational work
- **Think of one avenue for your team**



Request Forms - Tips & Tricks

Determine **who & when** requests will be submitted to the team

Use request forms to gather the information you need to effectively plan work

Consolidate requests into a single form, when possible.

Determine who will traffic the requests & assign out work to the team

What % of requests will your team take on?



Templates - Tips & Tricks

Use templates for the process taken 70-80% for initiatives

Combine inputs and outputs into a singular task. Utilize each task for the end-to-end process of planning and executing on a deliverable.

Minimize the tasks and subtasks. Only use subtasks if there are strict dates & change in assignments.

Add in relative durations and utilize dependencies for easy re-schedules and hand-offs



Questions?

