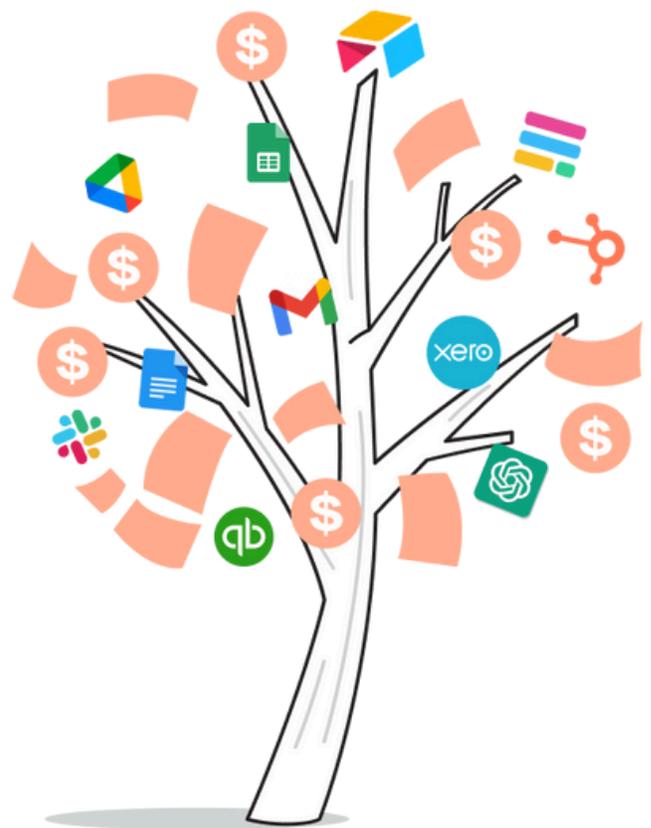




# Creating a Business Automation Plan

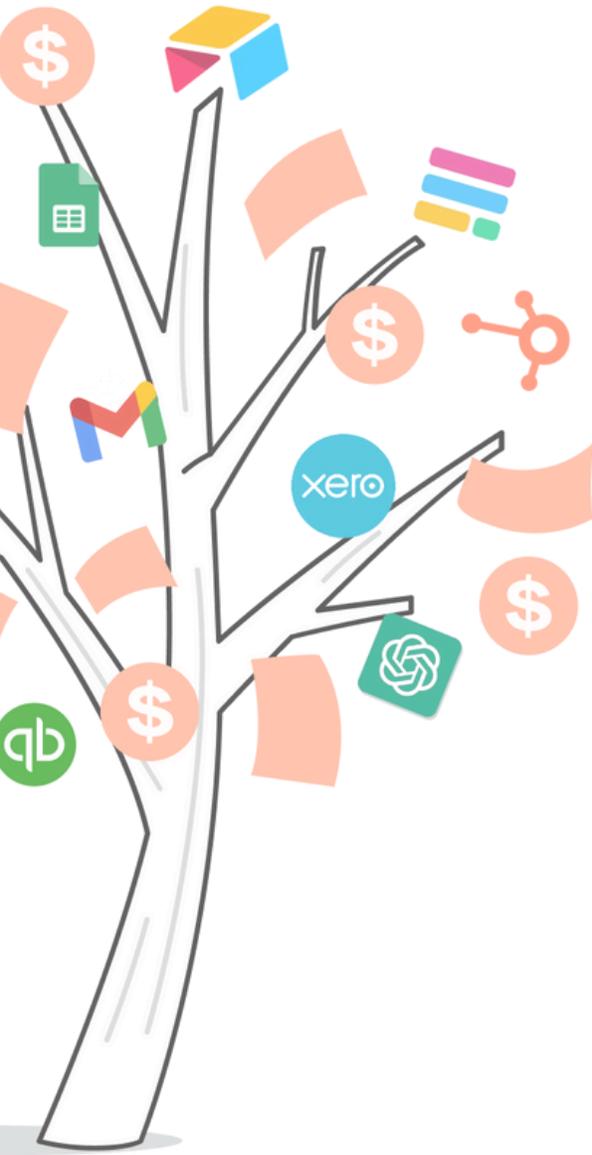
By Aaron Anderson



**Automation is not about replacing jobs; it's about augmenting human capabilities.**

**By automating routine tasks, we empower your talented professionals to focus on strategic decision-making and growth.**

**At Integrate, we believe in harnessing the power of automation to unlock your team's full potential and elevate your productivity to new heights.**



# Table of Contents

04	Why Prioritize Automations?
05	Become an Automation Champion
06	Designing Your Automation Plan
07	Prioritizing Automation Options
08	Research Integration Capabilities
09	Communicate Automation Value



# Why should your team prioritizing automations?

With an array of tools - from project management platforms and CRM software to finance, data analytics tools, and digital marketing applications - our customers are increasingly productive. However, the real power is harnessed when these tools are seamlessly integrated using our unique Integrate method, thereby bolstering productivity.

The Integrate method aids you in connecting your tools, enhancing their individual capabilities, and creating a synergistic effect. This method has helped our clients streamline their operations, reduce manual work, and foster better collaboration between teams, resulting in significant time savings.

Automation is nothing new.

According to McKinsey's report, "[Generative AI and the Future of Work in America](#)", the timeline for automation adoption could be sharply accelerated.

The proliferation of systems has contributed to an ever-growing need to connect tools. The one-stop-shop concept popularized during the move to the cloud in the early 2010s is now transforming into a niche-and-integrate model. Applications can perform specific tasks with incredible precision, leading to increased tool usage across teams and departments. This creates hyper-productive teams but can result in a disjointed business. Data tracked in multiple systems with different sources of truth has become a leading problem for businesses.

According to Merge.dev's 2024 "[State of Product Integrations](#)", organizations have to build integrations with several software categories.

The top categories are:

- **CRM:** SalesForce, HubSpot, PipeDrive
- **Project Management:** Monday.com, Asana, Trello, SmartSheets, GoogleSheets, and MS Business Products
- **Help Desk:** ZenDesk, Intercom, FreshDesk



# Become an Automation Champion

As an automation champion, you will have a thorough knowledge of your processes, your industry, your applications, and your stakeholders' challenges and objectives.

Your role is to bring automation ideas to the table and lead the way on saving your team time and money. You'll be the key point of contact for drafting the Business Automation Plan, enabling executive buy-in, overseeing automation projects, prioritizing integrations, and communicating value. Design will be the first step in your Automation Champion journey.

Next, we'll prioritize your organization's needs and find which integrations provide the highest level of return on investment.

## **What an Automation Champion is Not: A technical expert.**

You don't need deep technical expertise to prioritize what to build. That's where Integrate would come in.



# Designing Your Automation Plan

Begin with a Visual Design Map to capture a snapshot of your current operations, identifying inefficiencies and areas ready for automation.

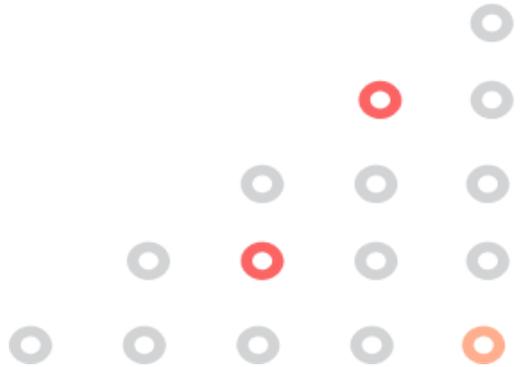
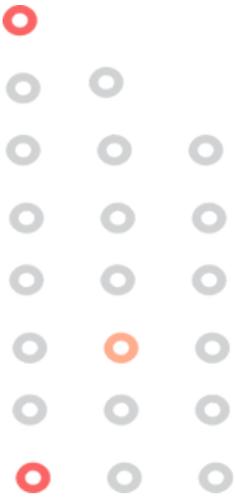
Use these steps to understand the nuances of your existing processes to start designing a focused, effective automation strategy that aligns with your business goals and delivers measurable improvements.



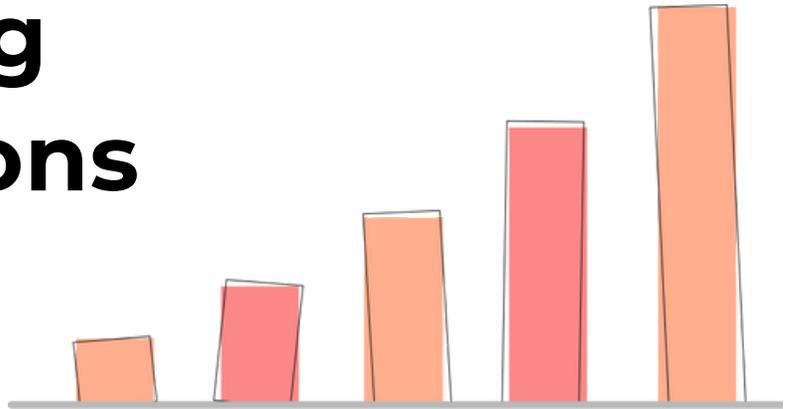
**1** Identify your stakeholders & their challenges

**2** List your applications and their uses

**3** Create a current state process map, highlighting areas that take the most time



# Prioritizing Automations



Strategically select and prioritize automation projects based on their potential return on investment. This structured approach helps analyze your business processes, calculating the time and financial costs associated with manual tasks, and identifying the automations that promise the greatest returns.

Learn to apply this quantitative framework to decision-making, ensuring that each automation project you undertake significantly boosts efficiency and profitability. Here's how it works:



- 01 | Select a process
- 02 | Define the annual hours it takes to complete process
- 03 | Multiply by the average hourly rate of that team
- 04 | Repeat for other processes

**1,500** hours saved per year

**\$120,000** saved per year



# Research Integration Capabilities

To ensure your automation efforts are effective, follow these steps to research your application's integration capabilities:



## Evaluate Current Applications

Look at the applications you're currently using. Search their website for APIs or integrations.

This can provide a wealth of possibilities for automation.



## Utilize Integration Resources

Dive into resources like [Zapier.com](https://zapier.com) or [Make.com](https://make.com).

These platforms can help you discover whether the app you're considering for automation already exists.



## What to Look For

Your goal is to determine whether the required actions and triggers exist.

Just because a website lists integrations or an app exists on a 3rd party low-code tool, it doesn't guarantee the presence of the right triggers or actions.



## Access the Applications

Obtain access to the applications you're planning to automate.

You can do this either by using a free trial or getting added to the application itself.



## Rank Integration Difficulty

Rank the automation step by integration difficulty:

- High: Requires APIs.
- Medium: Close to meeting requirements but with some reservations.
- Low: Actions and triggers align perfectly with requirements.



## Prioritize Based on Cost and Manual Work

With these rankings in hand, sort by the lowest cost and the highest manual work.



# Communicating Automation Value

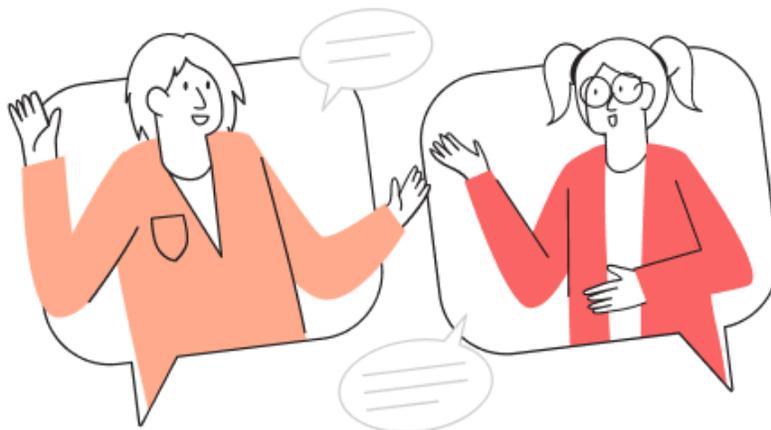
No matter how brilliant your automation plan, it can only succeed if it lands well with your team, stakeholders, and decision-makers.

**The magic ingredient is visualization.**

Walk your team through the journey. Start from your current challenges, then unfold the existing state, and finally, present them with the proposed future state.

Your main spotlight should be on the time savings realized by automation.

Show them how, instead of spending countless hours on manual tasks, their time can be repurposed for strategy and creative thinking.



# About 1ntegrate

Time is money - 1ntegrate will save you both.



## Design

Create effective automation strategies that t your business needs.



## Build

Deep technical expertise to build fast & reliable automations.



## Maintain

Provide ongoing support and monitoring to ensure the integrations operate smoothly.

**Airtable** Google Sheets Xero Google  
Slack **Hubspot** CRM **Notion** Google  
Microsoft Calendar Google **Docs** Go  
**Google Forms** OpenAI GPT-3 JSON  
Outlook Fillout **Email** Make **Zapier**  
**Smartsuite** Softr Airtable Google S  
Google Email API **Slack** Hubspot C  
Calendar Microsoft **Calendar** Docs



# AARON ANDERSON

## CO-FOUNDER OF INTEGRATE

Aaron is a San Diego native with a passion for solving complex technology challenges. He thrives on making sense of incoherent application ecosystems, often found with a digital whiteboard and process map, asking questions to understand and improve customer workflows.

With over a decade of experience, Aaron has led over 200 international implementations of end-to-end technology solutions.

[aaron@Integrate.com](mailto:aaron@Integrate.com)

