



TECHNOLOGY & OPERATIONAL INSIGHTS • AI & AUTOMATION

Before You Automate a Business Process, Understand Why It Exists

Automation works best when the underlying process is understood, simplified, and governed before software takes over repetitive steps.

READING TIME 5 min CATEGORY AI & Automation PUBLISHED BY Client Care Operations

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EXECUTIVE SUMMARY

- 01 Software can make a poorly designed process faster without making it better. Start with the decision the process supports, not with the tool.
- 02 Map the real work from trigger to closure, then remove steps that only compensate for older limitations before automating anything.
- 03 Use rules for stable decisions and AI only where unstructured information needs interpretation, keep humans in authority over consequential outcomes, and prove value with a small, measured pilot.

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The promise of automation is simple: less manual work, faster processing, and fewer opportunities for error. The challenge is that software can execute a poorly designed process just as efficiently as a good one. When an organization automates the wrong sequence of steps, it may get a faster version of the same confusion.

Imagine a service business where an employee receives a customer request, copies its details into a spreadsheet, forwards the spreadsheet to a manager, and waits for an email approval. A new automation could replicate all four steps in seconds. But it would preserve two unresolved questions: why does the spreadsheet exist, and which requests truly require approval?

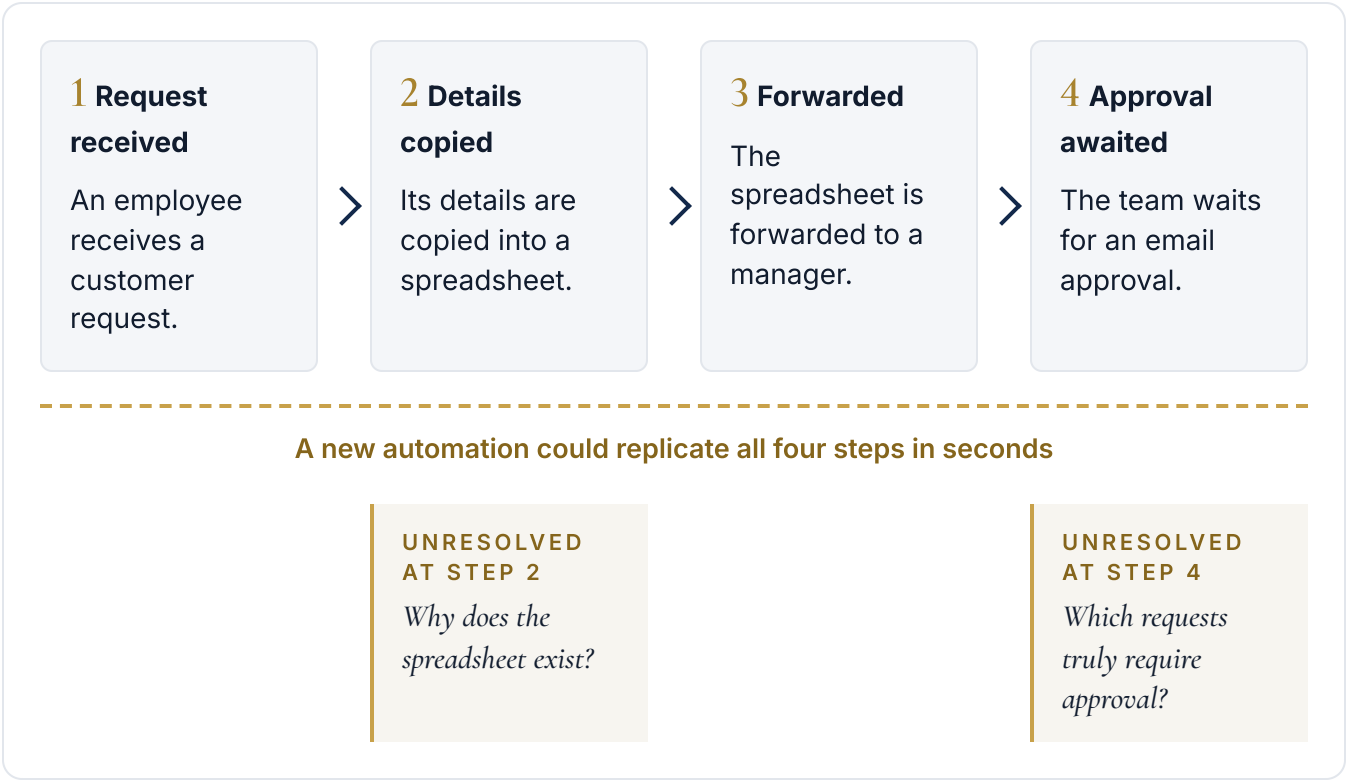


Figure 1 Automating the current process preserves its unresolved questions **ILLUSTRATIVE**
Original CCO diagram based on this article; example is hypothetical.

The better starting point is not *Which tool should we buy?* It is *What decision is this process intended to support?*

Software can execute a poorly designed process just as efficiently as a good one.

KEY INSIGHT

First, observe the work as it actually happens

The documented procedure and the real procedure are often different. People introduce shortcuts, duplicate records, rely on informal messages, or work around technology that does not fit their responsibilities. These adaptations can be intelligent responses to a flawed process.

Map a representative case from its initial trigger to its final outcome. Identify the individual or system responsible for each hand-off, the information required, typical waiting time, and what happens when the case does not fit the usual pattern. Where systems generate suitable event data, process-mining techniques can help reconstruct workflows and expose delays or variations. Microsoft describes process mining as a way to understand real workflows and identify improvement opportunities; it is not a substitute for speaking with people who perform the work.^[1]

A useful workflow map answers five questions:

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- 01 **Trigger:** What event starts the work?
 - 02 **Inputs:** Which information is required and where does it originate?
 - 03 **Decision:** Who decides what happens next, using which criteria?
 - 04 **Exceptions:** What happens when the information is incomplete, sensitive, or unusual?
 - 05 **Closure:** What evidence shows the request was resolved correctly?
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Remove unnecessary steps before automating them

A workflow may contain steps introduced to compensate for older limitations. A manager might approve every request because the previous system lacked transaction limits. Teams might send daily status emails because nobody can see a shared queue. Automating those steps preserves the cost of the workaround.

For each activity, ask: What risk does this control reduce? Is that risk still present? Could the same result be achieved with a clearer rule, better interface, or shared record? Keep essential controls; eliminate duplication; clarify ownership; then choose technology.

ILLUSTRATIVE EXAMPLE

A small multi-location company records maintenance requests through email. Before building an AI classification workflow, it defines a short intake form, a severity scale, one accountable owner, and a closure rule. The resulting automation is simpler and easier to test because the operating model has already been clarified.

Separate rules-based automation from AI-assisted judgement

Not every task needs artificial intelligence. A deterministic rule works well when the inputs, conditions, and desired outputs are stable: for example, routing an approved invoice below a threshold to the accounting queue. AI may be useful where unstructured language must be summarized or categorized, but uncertain outputs need validation and oversight.

A responsible design gives humans authority over consequential decisions. It also defines what the system is permitted to do, which data it may access, how results are checked, and what happens when the service fails. NIST's voluntary AI Risk Management Framework organizes these concerns around governance, context mapping, measurement, and risk management.^[2]

Pilot the smallest meaningful workflow

Choose a process with a clear owner, frequent enough activity to evaluate, low-to-moderate consequences if something goes wrong, and a measurable outcome. Establish a baseline before changing anything. Possible measures include median turnaround time, rework rate, manual touches per case, overdue exceptions, and the proportion of cases closed with an audit trail.

Run a controlled pilot. Compare cases handled by the new workflow with a representative prior period or an appropriate comparison group. Review exceptions and staff feedback. A successful automation should improve the process without weakening its safeguards.

A practical test before you invest

Before asking for a proposal, write a one-page process brief: what the workflow accomplishes, where it starts and ends, which systems it touches, who owns the outcome, what data is sensitive, and how you will recognize success. If those questions are unanswered, the priority is process discovery, not automation development. The answers form the diagnosis that automation should follow.

CCO PERSPECTIVE

Technology should strengthen a coherent operating system, not conceal its weaknesses. CCO's automation work begins by understanding how information, decisions, and accountability move through an organization.

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Prefer to talk it through? Discuss a process you are considering automating:

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Sources and further reading

- [1] **Microsoft Learn**, *Overview of process mining in Power Automate*
<https://learn.microsoft.com/en-us/power-automate/process-mining-overview>
- [2] **NIST**, *AI Risk Management Framework Playbook*
<https://www.nist.gov/itl/ai-risk-management-framework/nist-ai-rmf-playbook>

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