JOSEPH ABRUZZO
CLERK OF THE CIRCUIT COURT & COMPTROLLER
PALM BEACH COUNTY

Stepping into the 21st Century: Automation & Change Management

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Topics for Discussion

What is Business Process Automation?

- Examples
- Benefits

Change Management

- Challenges
- Best Practices

Our Office Experience

- Lessons Learned
- BA/Training Team

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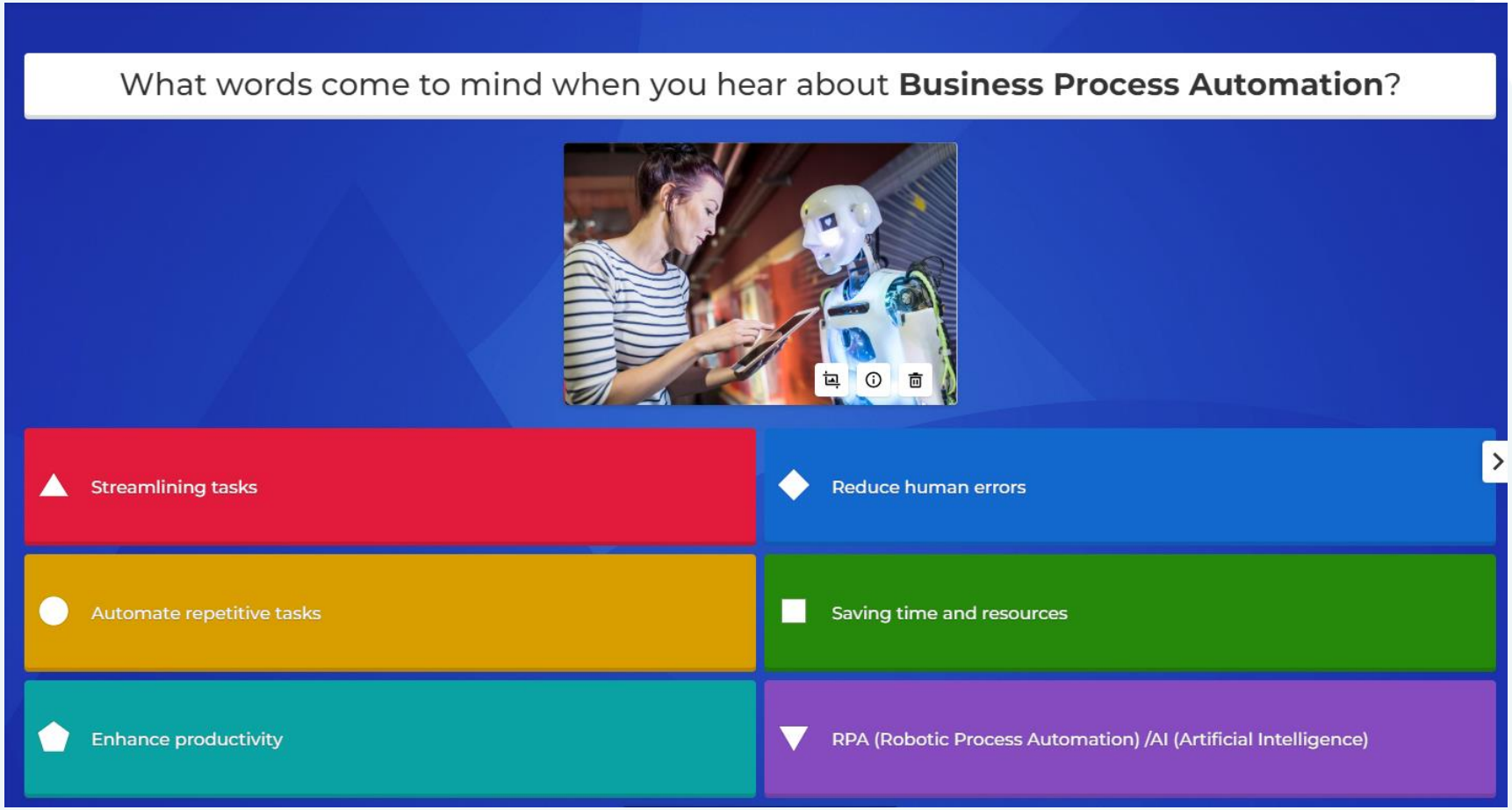

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WHAT IS BUSINESS PROCESS AUTOMATION?

The use of technology and software to automate business processes, streamline workflows, and centralize information with minimal human intervention.

Examples of Business Process Automation

Basic/Simple Automated Improvements

- Electronic Forms
- Utilizing “Shared” Software (SharePoint, File Share, One Note)
- Automated Workflow
- Vendor Payment Search Portal

Major Implementations

- New Software
- CMS (Content Management System)
- Contract Management System
- AI/RPA (Artificial Intelligence/Robotic Process Automation)

Benefits of Business Process Automation

Increase

- Increased Productivity
- Increased Reliability

Reduce

- Reduction of Human Errors
- Reduced Time & Costs
- Minimize & Mitigate Risk

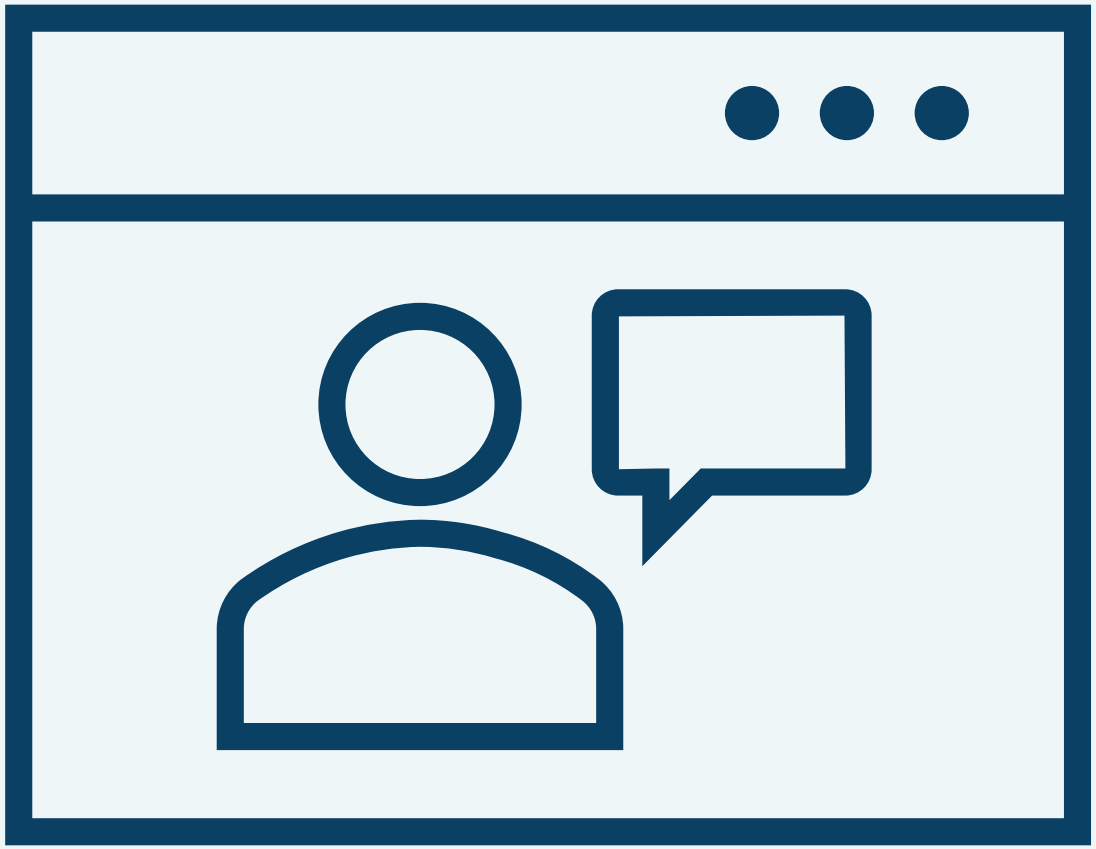
Facilitate

- Reporting & Forecasting
- Facilitates Remote Work

Improve

- Improved Customer Satisfaction
- Improved morale and teamwork

Video Placeholder



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What are the Change Management Challenges through Employee's point of view?

As long as the new system does exactly what our current system does, we are ready to change.

We have a problem!

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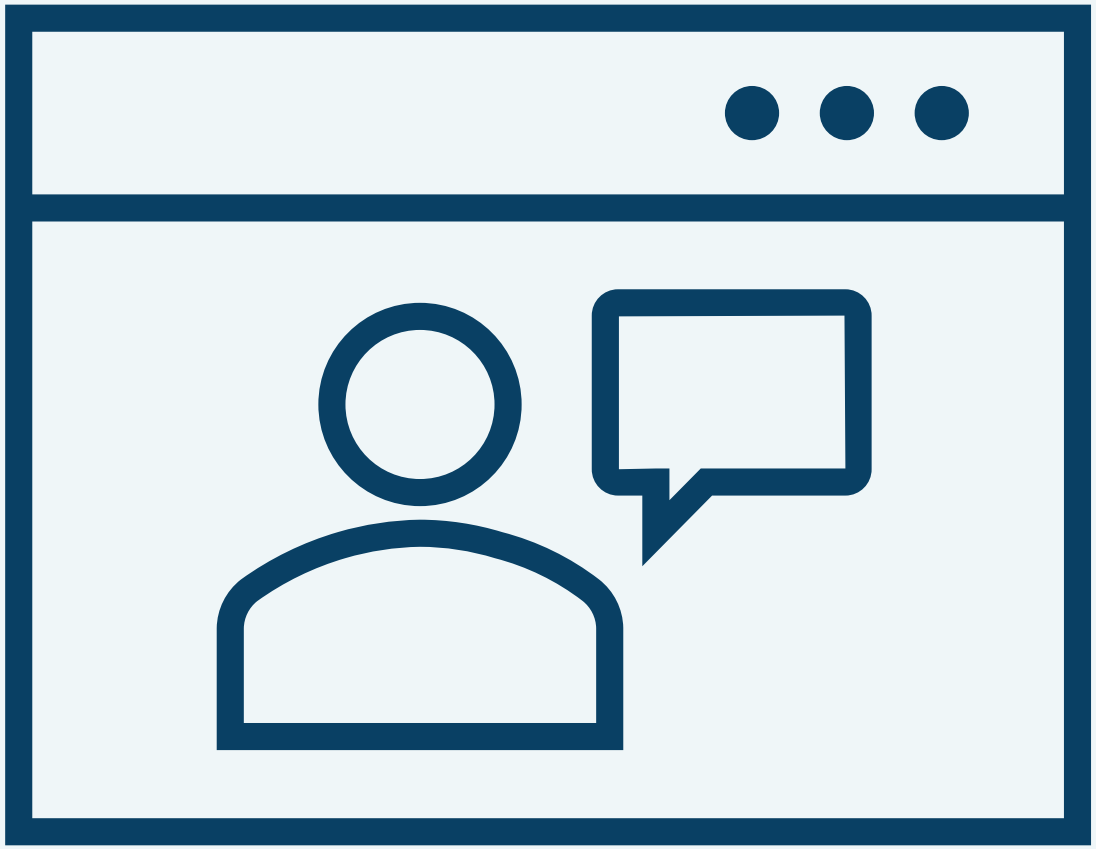
Change Management Challenges Employee Concerns

- Change creates uncertainty and stress.
- Will they be included in the process?
- How will this change effect job duties?
- Will there be an impact to staffing?
- Concerns with learning new technology.

Video Placeholder



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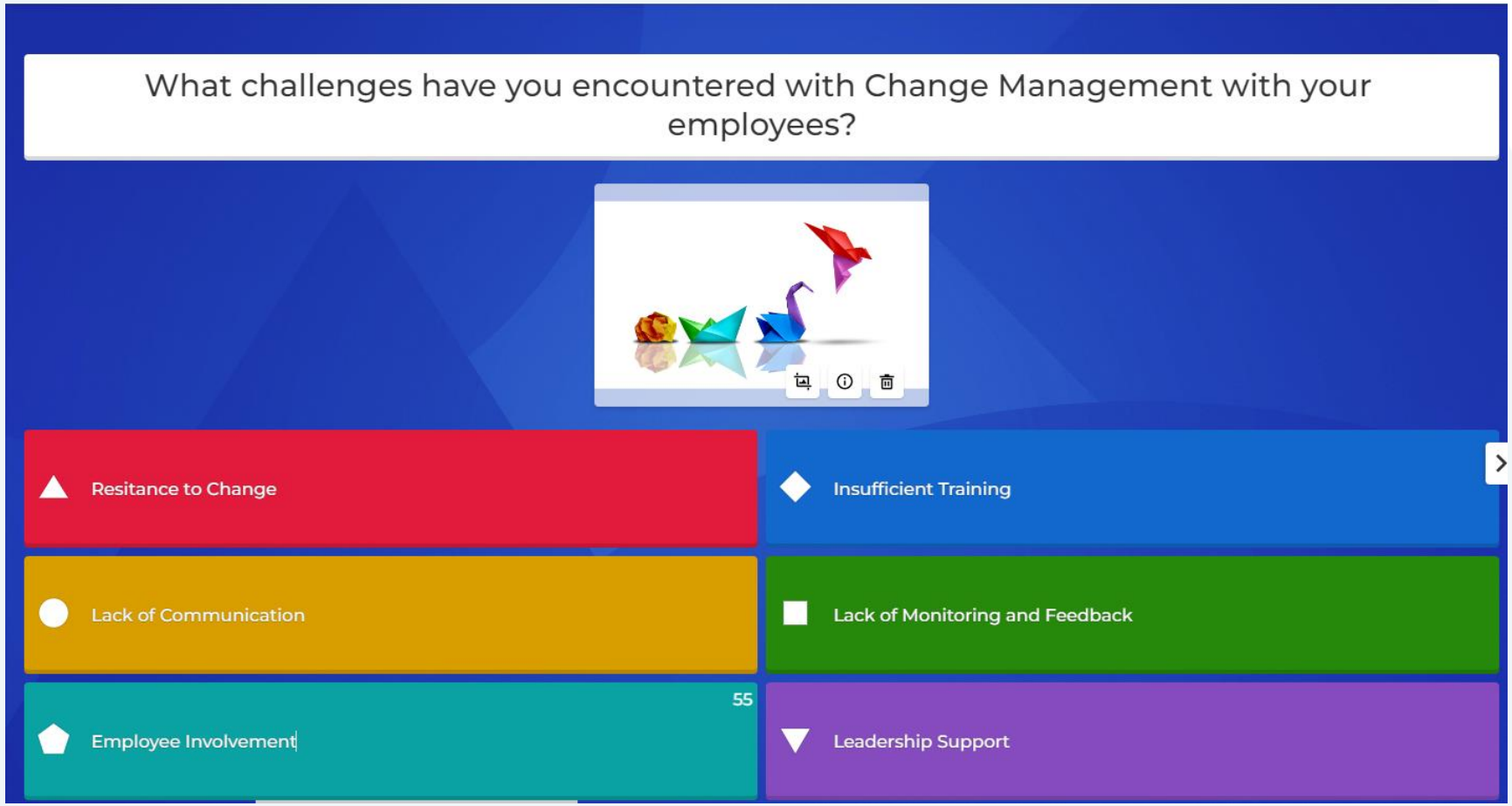

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Change Management Best Practices

- Pre-Implementation
- During Implementation
- Post-Implementation

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Change Management Best Practices

Pre-Implementation

- Employee buy-in
- Identify & involve ALL stake holders
- Identify new business requirements and pain points
- Actively engage employees of all levels and experience
- Document current processes
- Training strategy

Change Management Best Practices

During Implementation

- Create detailed project plan and timeline
- Create testing scenarios and detailed scripts
- Testing Region/Sandbox for employees
- Meet with testers regularly to review issues
- Provide Training (various platforms)
- Conduct Pilot or Mock Go-Live sessions

Change Management Best Practices

Post-Implementation

- Provide on site support for challenges and issues
- Provide additional training if needed
- Expect post go live issues
- Plan for drop in productivity during initial first few weeks
- Lessons Learned Meeting

Our Experiences – Lessons Learned

- Identify/include **ALL** stakeholders
- Communication and clear documentation
- Documenting detailed current business process

Our Office's Approach

- Create a new team of Project Coordinators, Business Analysts, Trainers, and/or SME's
- Filled with existing employees from various functional areas
- Expanded the team over the last 5 years to meet office needs

Our Office's Approach

- Gap between IT and Functional teams
- Functional team advocate that could understand and communicate with both technical and business team's "translator".

- Business Analysts
- Trainers

- Business process documentation and requirements
- Create testing scenarios and scripts
- Coordinating & facilitating testing
- Provide end user training

Questions?

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