

THE SIX ELEMENTS

Take control, be proactive, and allow your team to focus on positive interactions with your clients.

BUILD A CULTURE FOCUSED ON AUTOMATION

Right People



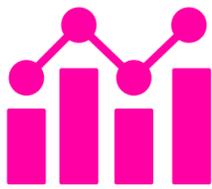
In order to build a proactive mindset, bringing your team on board is key. Provide peace of mind that automation isn't about replacing them, but making their job more efficient. When you invest in an internal resource and support them, you can watch the whole team grow and shift their mindset to think of ways to continue to be proactive automators.

Solid Documentation

Documentation can be a hard process to prioritize, but it is essential to become automated and shift to being a proactive team. Operationalizing the task and documenting it provides a roadmap for the engineer building the automation. If you can get metrics from your documentation system, you can identify what SOP pages or checklists are referenced the most to identify automation focus areas.



Great Data



If a process is documented correctly, you can spot trends where automation is necessary. Leveraging your tools to capture and organize the data you collect can become incredibly useful. Without being organized, it is hard to track and adjust your services. If you are not collecting that data properly, you will not know where to look for automation opportunities.

Automation Engagement

As much as AI has become a popular topic, it still needs a foundation built on people's ideas. Your people cultivate the shift of your team. Find automation opportunities by discussing it in meeting regularly and rewarding your team's efforts towards automation.



Dedicated Resources



In an expensive labor market, you bridge the gap through dedicating a resource to automation, which allows the rest of the team to spend time with their clients. Do more with less, create efficiencies, and develop environments that continue to grow with MSP's needs. Whether it is a third party like Stack Advisors, an internal resource, or even a hybrid model, having a person dedicated to driving automation is crucial.

Iterative Automation

Build a foundation around automation by creating a cycle to follow. Brainstorm an idea, develop and test it, document the process, deploy the solution, track the progress, and then modify based on what works. Never create a new automation and then forget about it, as there is always room for improvements down the line.

