10 factors in selecting an automation partner

March 31, 2021

Instead of choosing to deploy automation in house, organizations can look to reputable third parties. While technology chops are important, of course, the ideal partner will also have:

1. **Horizontal experience**: Look for someone who has done this before—dozens or even hundreds of times. They should understand what needs to go into a strategic roadmap, have mapped out process flows for hundreds of common business-process automation use cases, and know ho̶w̶ ̶t̶o̶ ̶platform into a business's individual goals. This will leȃd̶ ̶t̶o̶ ̶f̶a̶s̶t̶e̶r̶ ̶turnaround

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down automation and bot deployment.

2. **Vertical experience**: The right partner will obviously know how to implement automation for your industry. But when they have also provided solutions for a variety of organizations across several industries, they can recommend strategies or tactics tied to automation that your business might not yet be familiar with. This can give a business a competitive advantage—if no one else in your industry is doing it in a particular way, you quickly become a leader.

3. **Vertical–specific experience** (if you're in a highly regulated space): We highlight above that partners with a breadth of experience can bring fresh perspective and process expertise to the table. But in highly-specific, complex, or regulated industries like healthcare or financial services, it pays to find a partner who understands that environment. Best-case scenario? A partner that has experience across verticals and in your specific industry!

4. **A proven way to structure and prioritize**: A partner must understand how to rank and prioritize areas of potential automation, define ROI for each, and always be navigating toward business value. It's this combination of process expertise and technical chops that the right partner will bring to your business in order to support your automation efforts in a way that's hard to do internally.

5. **An eye for quality**: A partner should not only have designed and deployed automation technology, but they should also bring a deep understanding of the quality frameworks that must go into intelligent automation.

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should have worked within the regulatory constraints of your industry and/or geographical area(s), so they know how to account for them within both the technology and the strategy.

7. **An understanding of how to drive cross-functional collaboration**: A partner should know how to gain cross-departmental buy-in, and how to obtain the right information from different lines of the business—as well as what that "right information" is.

8. **An ability to start a business off on the right foot as well as commit for the long haul**: An automation program has to start off on the right foot, but it's also a years-long journey. Bots need fine-tuning and maintenance as common exceptions become apparent once the bot has been running for a while, and as technology changes. Additionally, all businesses change over time. Bots may need to "learn" new things and process new transactions as an organization evolves. Partners should be able to start an organization off on the right track, but also sign on for a long-term partnership, not a build-it-and-run scenario.

9. **A method for scalability**: Automation partners should approach projects with a holistic view. They should be able to see potential use cases for automation across the entirety of an organization— not just for a few tasks or within one or two departments—and understand how to scale automation to other parts of a business without starting from scratch each time.

10. **Chemistry**: It's not just for personal relationships anymore. Look for compatibility across communication styles, work cultures, and commitment to making the partnership work for everyone.

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