

# Unlocking ROI Through Strategic Process Automation for Your Business



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# Executive Summary



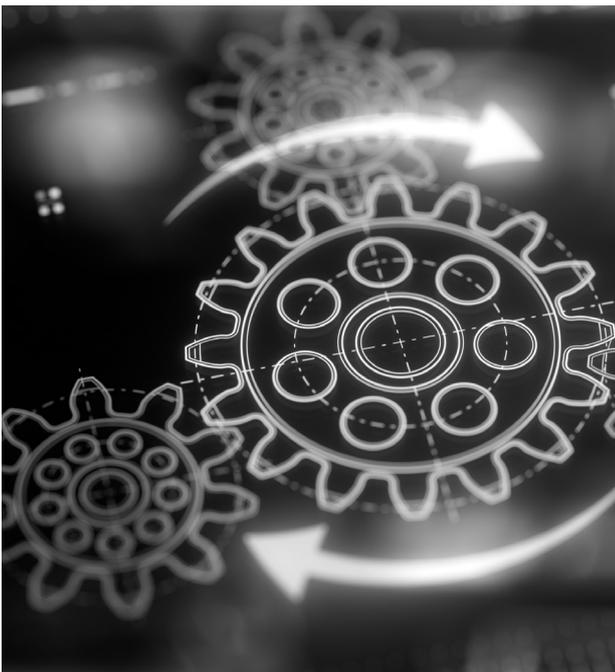
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Process automation has the power to transform businesses by improving efficiency, reducing costs, and enabling growth. However, many organizations face challenges in identifying the right processes to automate, calculating the true return on investment (ROI), and managing risks. This whitepaper serves as a comprehensive guide to overcoming these challenges. It translates its core insights into actionable strategies for business leaders and teams, empowering you to successfully implement automation projects and realize measurable value.

This guideline will help you identify automation opportunities, estimate ROI, mitigate risks, and design a phased implementation strategy that aligns with your business goals. Whether you're a decision-maker, team leader, or process owner, this guide will enable you to turn automation into a strategic advantage for your organization.

# Why Automation Matters to Your Business



Automation is no longer optional in today's competitive world—it's essential. However, not all automation efforts succeed. Common pitfalls include:

**01. Hidden Costs:**

Training, system integration, and downtime are often underestimated.

**02. Resistance to Change:**

Employees may view automation as a threat, slowing adoption.

**03. Overpromising ROI:**

Benefits like improved customer satisfaction and employee morale are hard to measure and often undervalued.

**04. Poor Alignment:**

Projects that don't directly support your business goals risk becoming costly distractions.

To overcome these challenges, this paper provides practical tools and frameworks to help your team implement automation successfully and with confidence.

# A Step-by-Step Approach to Process Automation

## Step 01: Identify the Right Processes

Not all tasks are suitable for automation. The most effective automation projects focus on processes that are repetitive, rule-based, high in volume, error-prone, and time-consuming.

Take, for example, an accounts payable department that manually processes thousands of invoices each month. The process involves data entry, cross-checking invoices against purchase orders, and obtaining approvals. Because this task follows a fixed set of rules, requires a significant amount of human effort, and is prone to errors, it is an ideal candidate for automation. By implementing an automated invoice processing system, the company can reduce errors, speed up approvals, and allow employees to focus on more strategic tasks.

The most relevant criteria are:

- **Repetitive Tasks:** Processes performed the same way every time, such as data entry or payroll.
- **Rule-Based Operations:** Activities governed by clear, consistent rules, such as invoice approvals.
- **High Volume:** Frequently occurring tasks offer the best return on investment.
- **Error-Prone Workflows:** Processes with high rates of manual error are strong candidates.
- **Time-Consuming Activities:** Tasks that take hours or days to complete manually are prime targets.

## Step 02: Calculate ROI

Understanding the financial impact of automation is key to making a strong business case. ROI is calculated by dividing net benefits (savings and efficiency gains) by total costs (software, implementation, training, and ongoing maintenance). For example, a company that automates invoice processing might spend EUR 50,000 on software and integration but save EUR 30,000 annually in reduced labor costs and error-related expenses. With these numbers, the company can determine how long it will take for the investment to pay for itself and demonstrate the long-term financial benefits.

The formula for ROI is:

$$\text{ROI}(\%) = \frac{\text{Net Benefits}}{\text{Total Costs}} * 100$$

- **Net Benefits include:**
  - Time savings (e.g., reducing repetitive work)
  - Error reduction (e.g., eliminating costly mistakes)
  - Strategic benefits (e.g., scalability or compliance improvements)
- **Total Costs include:**
  - **Upfront Costs:** Software, hardware, and implementation
  - **Recurring Costs:** Maintenance, updates, and training
  - **Hidden Costs:** Integration, downtime, or employee onboarding

## Step 03: Start Small with Pilot Projects

Rather than committing to a company-wide automation rollout, a smart approach is to begin with a smaller, high-impact project. A sales team, for example, may be spending hours each week manually updating customer relationship management (CRM) records. By implementing a simple automation tool that synchronizes call logs, email interactions, and customer updates automatically, the team can cut administrative work in half. The success of this project builds momentum and proves the value of automation before expanding to other areas of the business.

## Step 04: Involve Your Team Early

Successful automation isn't just about implementing technology—it's about people. Employees should be involved early in the process to help identify inefficiencies and suggest improvements. Instead of presenting automation as a job threat, businesses should highlight how it allows employees to shift their focus from repetitive tasks to more meaningful work. Providing proper training and support ensures that automation is adopted smoothly and delivers the expected benefits. To encourage adoption, in a nutshell:

- **Engage Employees:** Involve your team in identifying processes to automate.
- **Communicate Benefits:** Highlight how automation can reduce repetitive tasks, allowing employees to focus on more valuable work.
- **Provide Training:** Offer hands-on training and support to ensure employees are comfortable using new systems.

# Real-World Examples of Automation Success

Automation is a long-term strategy for innovation and expansion rather than only a temporary efficiency fix for companies trying to stay competitive in an ever digital environment.

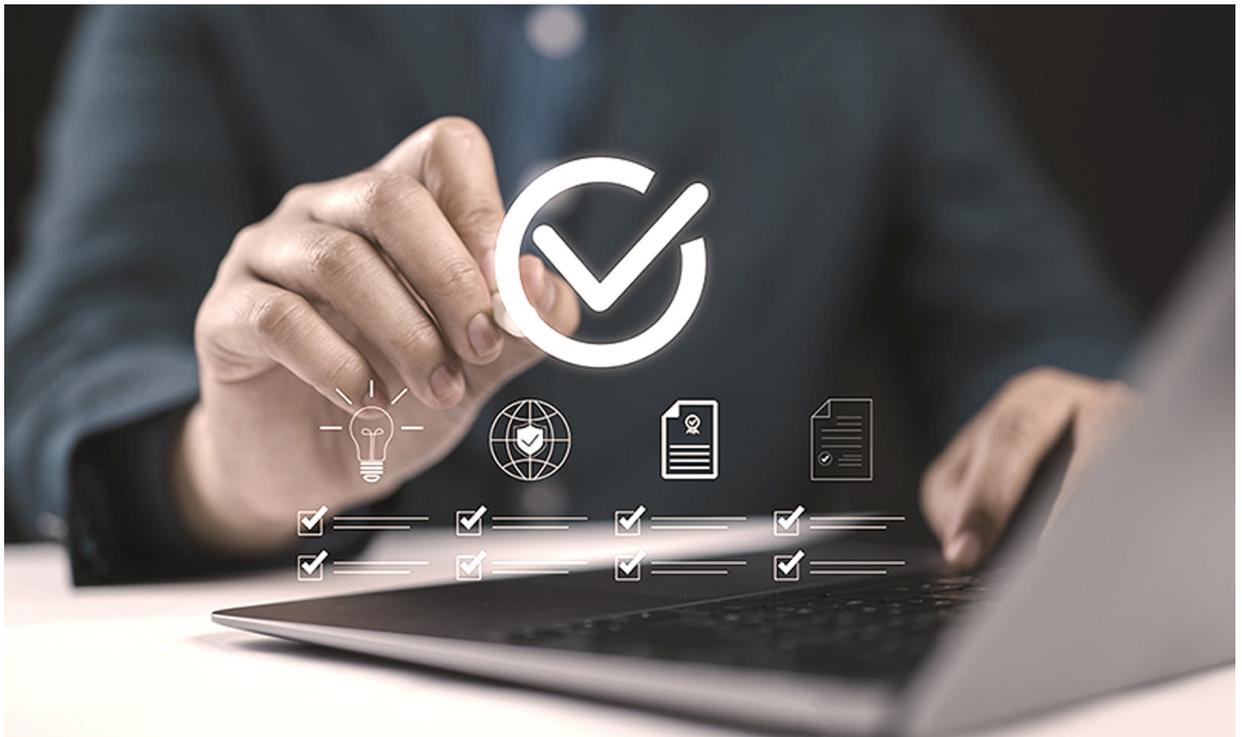
## 01. Processing Invoices for a Large Company

A multinational corporation battled a delayed and prone to error invoice approval system. The accounts payable team had to manually enter invoice data into the enterprise resource planning (ERP) system, cross-check amounts against purchase orders and locate manager approvals every month. Late payments, supplier conflicts, and inefficiencies followed from delays and mistakes.

The business automated invoice data collecting, validation, and approvals using an RPA system. The outcomes were startling: the company saved almost EUR 45,000 annually in administrative expenses, processing time was cut by 70%, and mistakes dropped dramatically. Employees who had been hooked into manual data entry also might concentrate on more important supplier negotiations and financial analysis.

## 02. AI Chatbots improving client service

Human agents working long hours answering repeated questions about order status, returns, and product availability for a mid-sized online store confronted growing customer service expectations. Long waits caused consumer annoyance and missed sales.



To answer regular consumer questions, the company used an artificial intelligence-powered chatbot. The chatbot answered quickly, freeing human workers to concentrate on more difficult consumer problems. Customer satisfaction ratings climbed, customer service response times dropped by thirty percent, and the business noted a clear rise in client retention. The retailer improved service while saving EUR 100,000 yearly by cutting the demand for extra support staff.

### 03. Financial Services' Compliance Automation

Rising regulatory obligations for a financial institution called for comprehensive compliance reports. The manual compilation of these reports took time and was prone to mistakes, therefore raising the possibility of fines and reputation damage.

The company cut the time needed to create reports by automating compliance processes, therefore boosting accuracy and lowering compliance-related expenses by EUR 60,000 a year. Automation let the compliance staff concentrate on proactive risk management instead of data collecting on repeat basis.

# Managing Risks and Ensuring Long-Term Success

“The road to effective automation is about making strategic decisions that create observable value for your company, not only about implementing the newest technologies.”

Mario Smeets

## Control of Risks and Guarantee of Long-Term Success

Although automation has many advantages, it also has hazards that, if improperly controlled, can cause budget overruns, staff opposition, or inability to produce promised results. Businesses that want long-term success have to be proactive in spotting and reducing these risks while also allowing flexibility to meet unanticipated problems. The main risk concerns in automation projects are investigated in this part together with doable solutions for overcoming them.

## 01. Technical Risks: Will the technology behave as anticipated?

Whether the technology will seamlessly fit current systems and procedures is one of the most often voiced worries about automation. Many times, companies believe that automation technologies will „plug and play“ with their present system only to find compatibility problems, data migration difficulties, or the necessity for expensive adjustments.

### Managing this risk:

- Run a feasibility study: See how well any automation technology fits your current systems, databases, and processes before using them. Find any early possible obstacles.
- Begin with a pilot project. Test the automation on a tiny but comparable procedure rather than a whole-scale deployment. This helps you to spot technical problems before committing more money.
- Choose dependable suppliers: Work with reputable automation companies who have shown success in your field of business. To find their dependability, ask for client quotes and case studies.
- Guarantee IT Involvement: Early in the process, involve your IT staff to assess technical fit, security issues, and long-term maintenance needs.

## 02. Operational Risks: Will Workers Appropriately Adopt and Use Automation?

If workers reject or misuse even the most sophisticated automated systems, they are useless. Many automation initiatives fail not because of technical flaws but rather from inadequate uptake. Workers can be afraid that automation would replace their employment or might lack the required skills to properly apply the new tools.

### How to Control This Risk:

- Talk about the advantages, unequivocally: Position automation should be seen as a tool improving output rather than a replacement for staff. Show how it lets employees concentrate on higher-value work by removing tiresome chores.
- Engage staff early on. Employees who have a say in spotting automation prospects are more inclined to embrace and apply the technology.
- Give practical training. To guarantee staff members are comfortable utilizing even simple automation solutions, they need training. Provide workshops, user guides, and continuous help.
- Assign an internal champion. Assign informed staff members to support automation and help colleagues adopt it.

## 03. Financial Risks - Will the project remain on budget and yield return on investment?

Because of hidden costs like system integration, process modification, and lengthy training durations, many automation initiatives surpass first cost projections. Companies may sometimes overestimate savings or undervalue the time needed to pay off financial gains.

### How to Control This Risk?

- Create a whole cost model. Think through running expenses (maintenance, training, updates) in addition to upfront charges (programs, licensing, consultancy fees).
- Budget for unanticipated expenses. Usually accounting for 10 to 20 percent of the budget, set aside a contingency fund to cover unanticipated costs.
- Employ a phased approach: Start modest with low-risk, high-impact automation projects then grow. This lessens financial risk.
- Analyze sensitivity in this regard: To see how financial risks might affect the project, model many scenarios—best-case, worst-case, and most likely results.



## 04. Strategic Risk: Is Automation Complementing Business Objectives?

Many companies hurry into automation without making sure it advances their more general strategic goals. Although automation can increase productivity, not all projects involving it create significant commercial value.

### Methods of Managing This Risk:

- Match automation to corporate priorities: Make sure automation helps important goals including regulatory compliance, customer satisfaction, or revenue increase.
- Steer clear of automated ineffective processes. Automating a poor process might just hasten the negative outcomes. Analyze and improve the process first then apply automation.
- Calculate Success Beyond Only Savings: Not only should ROI be the success indicator. Think on additional elements such as shorter turnaround times, better accuracy, and better customer experience.
- Review and adjust often. Business needs change; automation should change with them. Periodically evaluate projects involving scale or refinement of automation.

## 05. Management of Change: Guaranteeing Extended Success

Automation is an ongoing change rather than a one-time endeavor. Companies who neglect to keep an eye on and improve their automation projects run the danger of losing momentum and passing on future gains.

### Manage this risk by:

- Establish a long-term automation plan. Create a road map emphasizing, depending on business effect, automation projects.
- Provide KPIs for ongoing observation. To evaluate automation achievement, track important performance metrics including staff adoption, error rates, and process efficiency.
- Iterate and Improve: One should consider automation as a dynamic instrument. Frequent process improvement helps to increase performance and enable adaptation to changing corporate needs.
- Promote an innovation culture. Allow staff members to propose fresh automation solutions and keep ahead of sector trends.

# Key Takeaways for Your Business



## **01. Start Smart:**

Use structured criteria to identify processes with the greatest potential for automation.

## **02. Prove the Value:**

Calculate ROI and present clear, data-backed business cases to stakeholders.

## **03. Engage Your Team:**

Address resistance by involving employees early and providing the necessary training.

## **04. Scale Strategically:**

Begin with pilot projects and scale incrementally based on measurable successes.

## **05. Think Long-Term:**

Prioritize projects that align with your broader business goals, ensuring sustainable growth and competitive advantage.

# Automation as a Strategic Advantage

The road to effective automation is about making strategic decisions that create observable value for your company, not only about implementing the newest technologies. Process automation presents great possibility to increase scalability, lower costs, and improve efficiency as this whitepaper has shown. Still, reaching these advantages calls for a methodical approach, meticulous preparation, and constant review.

Through proper process identification, companies may guarantee that efforts at automation concentrate on high-impact areas yielding the best return on investment. Accurate ROI measurement helps companies to create a solid case for automation, therefore guaranteeing sustainable and justifiable expenditures. Beginning with small, high-impact initiatives offers a chance to test automation solutions in a controlled setting, honing them before expanding the business. Most significantly, early involvement of staff members guarantees seamless adoption, reduces resistance, and optimizes the effect of automation.

This road requires constant management of dangers. Feasibility studies and pilot testing help to solve technical concerns so guarantee flawless interaction with current systems. Operational concerns like employee resistance call for a proactive strategy to change management including training and communication.

By thinking about hidden costs and doing sensitivity studies to project several ROIs, one can help to reduce financial risks. Businesses also have to make sure that automation complements long-term goals; so, they should avoid automation for its own benefit and concentrate instead on strategic purposes including enhancing customer experience, reinforcing compliance, or allowing company scalability.

Automation is a long-term strategy for innovation and expansion rather than only a temporary efficiency fix for companies trying to stay competitive in an ever digital environment. Companies which make investments in automation now will have an advantage in agility, resilience, and productivity, therefore enabling them to increase operations without proportionately raising costs, enhance customer experiences, and enable staff members to concentrate on higher-value work.

One must act if one is to succeed. The techniques described in this whitepaper offer a road map to enable your company to go from automation theory into useful, results-oriented application. Your company can create sustained competitive advantage and future-proof operations for years to come by wise judgments, use of organized frameworks, and constant improvement of automation initiatives.



## Get in touch

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