Change with care

How to ensure a smooth transition as your company automates its processes

INTERVIEWED BY MARK SCOTT

Automation affords companies the opportunity to provide more efficient service to customers, but caution must be taken with the manner in which this efficiency is achieved, says Matthew Berthold, Executive Vice President, Chief Administrative Officer at Westfield Bank.

"A lot of the larger banks follow a mass banking strategy with banks located everywhere, which is the traditional way of banking," Berthold says.

"There are some customers who like that connection and like to be able to go to the office to do their banking. Others appreciate the growing movement toward self-service banking that utilizes automation. Every bank, and every business, needs to figure out how to deliver its own products and services most efficiently in a way that satisfies its customers."

Berthold has been working on an in-depth project this year to automate processes at Westfield Bank. One of the most valuable lessons he has learned is the importance of always keeping the end customer in mind as decisions are being made.

"It's important for us to look at all the processes that aren't a value-add to the customer," Berthold says. "It's really trying to eliminate those non-value-added parts of the process."

Smart Business spoke with Berthold about how to make automation work in your business without upsetting customers who value a more personal touch.

What are some helpful tips for companies looking to automate their processes?
One critical component to any change management strategy is an upfront dedication of resources to the task at hand. You need to completely commit to the investment to create buy-in throughout the

MATTHEW BERTHOLD
Executive Vice President,
Chief Administrative Officer
Westfield Bank
(330) 887-8662
MatthewBerthold@westfieldgrp.com

WEBSITE: To learn more about how your company can function more efficiently, visit www.westfield-bank.com.

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process to ensure that you're adequately addressing all the key concerns that may be out there.

If you're not allocating the necessary resources and engaging the right people who have a stake in the change you're considering and if you're not using that input to guide your decision-making process, it becomes much more difficult to achieve your goals.

As part of that soliciting of feedback, you also need to examine the end-to-end processes you are targeting to automate. Be clear about what you have and compare it to what you'd like to achieve. In other words, you need to know where you are before you can determine where you want to go.

There are typically a number of steps to any process. You need to take a methodical approach to ensure that the new and improved process you formulate really is just that, a better way of completing the job. Metrics can play a key role in this step by giving everyone specific targets to aim for and goals to measure the success of the new system.

For example, there are certain steps that are part of extending a loan to a customer and there is a certain order in which those steps need to be completed. If you're a bank and you don't take a comprehensive look at the process and study how to make the transition, you may not gain the efficiencies

you had hoped to achieve.

Finally, you need to alleviate fears that may be out there about what automation could mean to an employee's future in the company. It's easy for non-management personnel who aren't privy to all the details to view automation as an effort to reduce costs by eliminating positions in the organization when the end goal is actually to reduce costs by creating efficiencies.

Focus on what is being gained. Explain that automation will enable team members to focus on other tasks and in the process, make the company stronger.

How do you know if you're maximizing the potential of automation?
When you're dealing with new systems, there is often a learning curve to understanding their functionality and capability.

The dedication of resources is again important in this area to ensure that you're making every effort to get the full benefit of the system you're implementing.

You want to get what you paid for, so work with your vendors and make certain that they have delivered a product that meets your expectations. Take advantage of their expertise to help you and your team understand how to use all of the processes that are now available through the new system. ●