

**Mike Merrill:**

Hello and welcome back to the mobile workforce. Podcast. I am your host, Mike Merrill and today we are excited to have our uh, guest back on again, mr. Josh Mullins. Josh is the Managing Director and founder of Automized, who helps automate and optimize business processes using intelligent automation technologies. In our last episode, we talked about how Josh helps companies to optimize their business processes using free tools and also what things that companies uh, can implement quickly as far as low hanging fruit to do business better. So Josh, excited to have you back on and talk more about automation. Thank you and uh, welcome back.

**Josh Mullins:**

Thanks Mike. Looking forward to talking about um, business process automation today and excited to jump in.

**Mike Merrill:**

Awesome. So let's just start right off the top. What do you feel like is the main benefit that companies get by injecting automation into processes that are more manual?

**Josh Mullins:**

Yeah, I'll kind of tie it back to our mission, Automized. Um, really it goes to creating better cultures around work. Um, a lot of tasks uh, that people do within a company today possibly uh, have the opportunity to be automated, um, depending on the tools being used. But because of that, um, if a business gets really busy or, um, end of month becomes really stressful, um, things like that, really, uh, our goal is to go into a company and give them the tools and kind of process efficiencies that allow the people within their companies to take vacations, spend more time with their families, and not have work in the back of their mind that's kind of distracting them or even just be

more involved in their communities. And that's really the goal, um, with what we're doing. Yes, because you're doing this work, you're going to see an increase, um, most likely in revenue or cost reductions and things like that. Um, but ultimately our focus is on people and making sure that kind of, that work life balance and quality of life is improved throughout.

**Mike Merrill:**

Love. That very important stuff. Ah, very important topics. And I think it's one thing to automate an individual's role or the tasks that they need to complete in a day and make those more efficient. But what are some technology tools or processes that you help companies implement that bridge that gap between one department and another so that you're not just helping that individual, but also really the team as a whole?

**Josh Mullins:**

Yeah, I would say from a technology standpoint, we're doing a lot. From a digital workflow automation standpoint, that's a really broad and vague um, area. Um, but we're looking at, okay, what processes are really repetitive, have defined rules and kind of have a consistent volume. And then from there we'll look at what technology supports automation the best within that, that's dependent on the systems and kind of what's being done today. And then the second area, uh, is going within a business and looking what's on paper. Um, there are tons of businesses today have paper forms for various things, whether that be out in the warehouse and tracking inventory coming in and out, or time cards or um, just like a vacation leave form, things like that. Um, we try to get those off of paper whether that be in an existing tool they're using like WorkMax, or using a different tool. That's a low code app builder that allows us to quickly build something and maintain it in a way that supports the business long term. And really that concept there is, especially with paper forms, is on that piece of paper. The only

person that can see that data is the person who has the paper in front of them. So when we have tools like workflow automation or low code apps, we now can make that data more visible. Um, the most common thing where we see opportunities for this is increasing throughput or kind of your production side of things versus before it was all kind of siloed and you couldn't really have visibility unless you did a lot of digging. Now we're able to see almost in real time what's occurring and make decisions cross functionally versus kind of in like that departmental view.

### **Mike Merrill:**

That's awesome. So when we hear words like optimization and automation, how important is it that, uh, things are optimized before you automate?

### **Josh Mullins:**

Yeah, it's so important. I would almost consider us a process optimization firm that does work with technology. Solely because you can automate any process, but it doesn't mean it's the right solution or the best process to automate. Um, example somewhere like you probably hear with data all the time is like garbage in, garbage out. So if you're spending a lot of time automating a bad process, you're still going to have issues when it comes to scale. It's going to technically be less expensive, um, because you're not having someone do it, you're having a piece of software do it. Um, but you're still going to increase cost every time your process goes up. And there's ways to build your processes and make them more efficient prior to implementing technology. And that's always our recommendation.

### **Mike Merrill:**

Okay, so let's say, um, we've optimized, we've automated. What do you say to employees or management people, um, that you're working with that are afraid that if you do all this stuff, I'm not going to have my job anymore?

### **Josh Mullins:**

Yeah, I would say probably 98% of the time people remain in their roles or even doing better work. Post us doing the work that we do, whether that be our

company doing it, or a project that you're kicking off internally and kind of leading yourself. Um, the best way to kind of address that is talk about, here's what this is going to allow you to do. Um, so if you're sitting with somebody who's doing paper time card entry every week, talk about how now they can really go out and be more proactive in supporting employees if they're within HR or if they're within accounting. They can be a little bit more strategic from a job budgeting standpoint. Okay. Really keeping tabs on what is about to happen versus what has already happened in kind of that retroactive correction approach. Um, that 2% of that 98%. Most of the times those people were already kind of not going to stick around with the company much longer, whether that be from their own decision or somebody else's. Um, because they weren't performing for the company standard or the business was already kind of looking for ways to optimize costs. So technology and this kind of automation work is sometimes a tool that is used. Um, but really the focus is never that. It's getting people into better positions and higher value work, um, that can drive a lot more value.

### **Mike Merrill:**

Yeah, I love that. The focus on higher value work, which again is actually the opposite of becoming, um, irrelevant to the business. You become actually more valuable.

### **Josh Mullins:**

Right, right. Exactly.

### **Mike Merrill:**

So when you decide, hey, here's the thing that we need to focus on with this company or that company. How do you pick which area to focus on first? What's the lowest hanging fruit that you normally see and what drives your decision in going there first?

### **Josh Mullins:**

Yeah. So last podcast I talked about kind of two buckets, um, when it comes to picking. So you're going to have the process of, uh, we're looking for time savings or like the manual effort that somebody's spending today and freeing up that time. Whether that

be on a different project or whatever that may look like, that's up to you. And then the second bucket is going to be around kind of that increasing your throughput or revenue, however you want to view that. Um, so from a core kind of here are your top opportunities. Finance and accounting related tasks. Uh, those really rules based and repetitive on a certain cycle. Those are great candidates for automation. Um, and then you can kind of expand outside of there and kind of look within inventory and supply chain and then project management. Um, a great example is like job setup and job closing. Most likely within your company. If you're in a trade, you have a checklist somewhere that says, okay, when we are done with a project, these five actions need to occur. A lot of times those five actions are very great candidates for some kind of automation work, um, within your company.

**Mike Merrill:**

Very insightful. So obviously productivity is the first area. How can we be more productive, waste less time? What are some other less tangible or maybe often overlooked areas that automation actually still can increase profits overall that maybe aren't as obvious?

**Josh Mullins:**

Yeah, I think if you kind of dig a layer deeper of that manual effort and time, um, and kind of going back to why we do what we do, um, if you're focused on turnover and hiring is a challenge for everybody right now. If you can keep an A player on your team, most likely if you were to go review the numbers, there's a pretty significant cost with somebody leaving your company and then having to onboard a new employee. So if you can invest in tools and technology that keeps that star player around, who knows all your processes, is great culture fit? By implementing some tools and technologies that give them a little bit better of a job because now they can focus on higher value projects, get them out of the robotic nature of business. I would say that's going to be, um, a really great lever for you, especially in an environment where it's challenging to hire and, um, keep employees around. Yeah.

**Mike Merrill:**

So they're more content, they're more happy, they actually have more fulfillment. Is that what you're getting at?

**Josh Mullins:**

Exactly. And a lot of times the thought is, okay, we have to pay them more, but we can't because limited resources, things like that. Um, but if you create a better role for somebody by implementing these tools and technologies that I talked about, that's going to drive significant value for your organization long term and in the short term.

**Mike Merrill:**

Yeah. And then you talk about manual, um, processes. Well, manual means physically having to do something. And so when there's automation, it feels like there could be more flexibility as well. Payroll can still run if you've got these tools in place. Even if you've got to take Timmy to the soccer game.

**Josh Mullins:**

Right, exactly. Yeah. Uh, you don't have to stay around and wait for something to process anymore. Um, once it's done, it's kind of seamless for the most part.

**Mike Merrill:**

Love that. So then tell, uh, us this. When should a company say, okay, it's time to bring a professional in here and really help coach us and guide us in some of these areas? Are there some things that you feel like are very common triggers for companies, uh, that spur them to call you?

**Josh Mullins:**

Yeah. Um, I like to say our unique kind of value prop is that we do the advisory and kind of help you understand what tools and where your opportunities are and then we do the implementation. And tying back to your question, why you would bring in like an expert, like Optimized or another company is when

you necessarily don't have the time or resources to really drive a project, um, from beginning to end or you feel like you don't know what's the best path to start. Um, there's so many tools out there. Um, we kind of selected the ones that we think are best. We have our own internal set that we use as well. Um, but if you don't have the time to really see a project from here's, why we're selecting this, here's where our opportunities are, and then selecting your tools and actually executing that. I would recommend bringing in an expert. Because really the biggest failure of this kind of work is when there's change management out there, or you don't have everybody on board that you need to because people are busy and things like that. By having an expert come in, they can help you understand where your opportunities are and then also help coach you without much time needed on how you can drive that actual adoption within your business. Because you can implement a tool, um, but if it's not used, you're actually not seeing that value that everybody estimated in the beginning.

#### **Mike Merrill:**

Yeah, that makes a lot of sense. So when you have, um, the ability to scale because I'm sorry, you have the need and the opportunity to scale because you have work that's backlogged and you can't get to it all, and maybe you have enough staff that you could get to more work if you had more automation, if you had some of these efficiencies in place. What are some common things that you see companies able to enjoy? That's a direct benefit because they put some of these tools in place.

#### **Josh Mullins:**

Yeah, I would say it boils down, I would say, to a process. So when we come in or you complete this kind of work, you've created a better process, and then hopefully at that point, you've also implemented technology to make that easier. So the common scenario I like to say is, before you start this kind of work, whether it be with a company like ours or internally, is there might be this kind of state of chaos of like, oh man, we just signed a customer on, there's another one coming. Our backlog is so large, it's always kind of this constant fire drill. And the ideal state of when we leave or kind of we're done with an

implementation, is that there's clarity and like, okay, here's what needs to get done. It's clear on here's the work that's incoming and what that means, but that work that's incoming. And as we grow or scale down or whatever that looks like, doesn't necessarily affect my day to day. I'm, um, focused on more of those higher value projects and all these customer demands and things that are coming in at once. We have processes and systems to support that in a way that's manageable.

#### **Mike Merrill:**

Yeah, that's great. When you've put these processes in place for a company, what are some of the areas where you feel like they were super surprised at what they were missing out on? And maybe they were like, oh my gosh, I can't believe we didn't do this sooner. Is there anything you can think of specific you could share?

#### **Josh Mullins:**

Yeah, I would say inventory management, um, is a huge one. Inventory in general is kind of gnarly, depending, um, on your company and the size. As you get bigger on, it gets harder. And because of that, a lot of people just use paper because it feels safe, you manage it, you can kind of feel it taxfully and see what's occurring. Um, but a company we worked with, uh, they had everything on paper and the balance that was shown in their accounting software and what was actually out in their warehouse. The difference kept growing and growing and growing. And by using a low code app that got the data off of paper and using some of the digital workflow automation tools, they were able to one see in real time what's actually occurring on the warehouse and make some updates to uh, their crews and things. So more things were stocked on their trucks, but also that discrepancy shrunk, I think around like 90%, um, which was significant. It was really just purely improving a process and using a little bit technology to help support that process in an automated fashion.

#### **Mike Merrill:**

Yeah, that's a great example. That's awesome. Well, we all love it when we have those success stories and where you get to look at that customer across the table and say, see, I told you, I told you this is what it was

going to be. And they're, oh, you were right. I wasn't sure, but you were spot on that value that we were missing out on and man, we're sure glad we did that.

**Josh Mullins:**

Right, right. Yeah. It's the best feeling, especially because it's so tangible of like you were in a kind of state of chaos before or didn't have great control. And then after the implementation, it's very clear and defined and you have great data that's flowing from that.

**Mike Merrill:**

Well, this has been fun. Another great conversation. Uh, I've uh, loved having you back on and we did a little word game, um, in the first podcast we recorded. And you and I picked a special, uh, word that we were assigned each other to use. Um, I gave you the word ubiquitous and you did a fantastic job using it. So bravo to that. What was the word you gave to me and how did I do?

**Josh Mullins:**

Yeah, I gave Mike the word jelly. Uh, I would say he did a pretty good job incorporating jelly into some kind of analogy with peanut butter and jelly and processes. So really surprised people. That one off.

**Mike Merrill:**

Yeah, and I love those sandwiches too, besides awesome. Well, thanks again for joining us, Josh. I hope that the listeners are able to walk away with a few takeaways. Uh, is there anything you would like to impart, uh, as we wrap up today that they can take away from our conversations?

**Josh Mullins:**

Yeah, just to kind of recap. This is really impactful work for your organization. Not only from cost savings or revenue growth, but also for your people. It um, creates better cultures and builds really strong teams that are resilient and it's at the same time, really hard work. So encourage you to start carving out time now and thinking through how you can adopt business process automation or some of these tools within your

business. And if that is a kind of challenging or scary topic for you, happy to feel free to shoot me a LinkedIn message or an email. I'd m love to talk to you through it. Um, because it's an area I love and I think it drives so much value for companies.

**Mike Merrill:**

Yeah, these are great areas of working on the business, things that all of us need to probably do a better job of within the industry, wouldn't you agree?

**Josh Mullins:**

Exactly.

**Mike Merrill:**

Awesome. Well, thanks again, Josh. Looking forward to staying connected and, uh, getting these episodes out to the listeners. And thanks again for joining us today.

**Josh Mullins:**

Yeah, of course. It was great talking with you, Mike.