

# HEALTHCARE PROCESS AUTOMATION CHECKLIST

## Planning

- Identify Repetitive Tasks
- Identify Tooling Capabilities & Gaps
- Determine Automation Goals
- Legal & Compliance Checks
- Conduct SWAT Analysis
- Build Rollout Plan
- Consult Stakeholders & Approval

## Deployment

- Tooling Selection & Procurement
- Core Metrics of Success of Tooling Identified per Tool
- Integration of Tooling to Wider Systems and CRM
- Determine Wider Criteria for Automation Success
- User Training
- Set User Controls With Only 1 Super Admin

## Monitoring

- Track Performance Metrics Against Pre Planned Goals
- Gather User Feedback For Systems Improvements
- Conduct Audits & Adjust Workflows as Needs Be
- Build & Maintain Documentation for Users and Stakeholders

## Optimisation

- Refine Goals As Business Goals & Needs Adjust
- Expand Automation as Needs Require
- Review Technology Updates and Update Your Tech Stack As Required (Including Removing Redundant Technology)
- Reporting on Success & ROI as well Building a Culture of Innovation