

The Do's & Don'ts of IT Automation

Scale Your Automation Strategy
with Nexthink Flow

Introduction

For every IT professional excited over automation, there is someone who knows to temper that excitement with caution. Why? Because despite the reduced strain on IT and potential cost-savings, even the most highly anticipated automation projects can stall due to lack of training, planning, and governance.

Automation scenarios are practically endless, but the resources to craft and deploy automations are not. The effectiveness of automation boils down to how and where teams use it. If you want your automation project to achieve liftoff, you need two things: the right people and the right plan.

If IT teams want increased efficiency with glowing green statistics, they must answer the simple questions: Who? What? Where? When? Why? And how?

Let's start with "the why."



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01.

Why Automate

Understanding your IT operations and employee experiences will help you identify use cases that will impact the business.

Don't fall for the cool trap! Yes, you can make Amazon Alexa react to an event, but what problem does that solve?

Cool is rarely the most impactful.

Do focus on what will alleviate pain for IT and employees.

IT Operations

With tighter budgets, innovation demands a new mindset. For example, a typical area for high expenditure is around software licenses. Could automating the retrieval of unused software licenses save money on the next renewal?

Talk to the IT service team leads to understand the top manual remediation or provisioning tasks their teams do. Look at how long each of these tasks takes. Identify the high volume and high time-to-fix tasks that could be streamlined by automation. For example, if someone is building the device for a new employee, instead of asking another person to double check the configuration, is there an opportunity to automate the lengthy checking process?

Employees

Question: why should you, as an IT leader, prioritize employee productivity? It's commonly cited that employee productivity drives company success, but can IT impact this? The answer is yes. IT teams can have a measurable impact on productivity by leveraging real-time signals and contextual analytics. According to [Microsoft](#), employees are 230% more engaged and 85% more likely to stay beyond three years if they have the technology that supports them at work.

Next question: how can you leverage proactive automation in your IT processes to improve employee productivity? To start, review the most common types of requests in the ITSM system. There are two reasons requests are an excellent source to deliver value back to the business very quickly:

1. The provisioning of a request in many cases is the same process each time. These repetitive activities are low hanging fruit for automation. Especially ones that have repeat requirements for interaction from IT personnel or require a long focus time to complete.
2. Most employees submit requests because an issue is preventing them from doing their job. The longer an employee must wait, the greater their frustration and the greater loss to their productivity. Focus on requests that have a long cycle time and identify areas where automation can speed that up.

Since [less than 50% of IT issues are reported by employees](#), you may also find opportunities to leverage automation to address the issues that employees don't report. Send surveys to capture the sentiment of the entire workforce, not just employees who request IT help. Analyzing ITSM tickets and employee sentiment will help determine quick wins to improve employee experience.

Do make a list of opportunities from IT operations, employee tickets, and feedback to prioritize based on the level of impact on the following areas:

- **Employee productivity time saved** (ie. processing their requests faster, solving without having to contact them)
- **IT time saved** (ie. reducing repetitive, manual tasks)
- **Mean-Time-to-Resolution (MTTR)** (ie. faster incident resolution by the service desk)
- **Cost savings** (ie. license reclamation, ticket reduction)

02. Who Should Automate

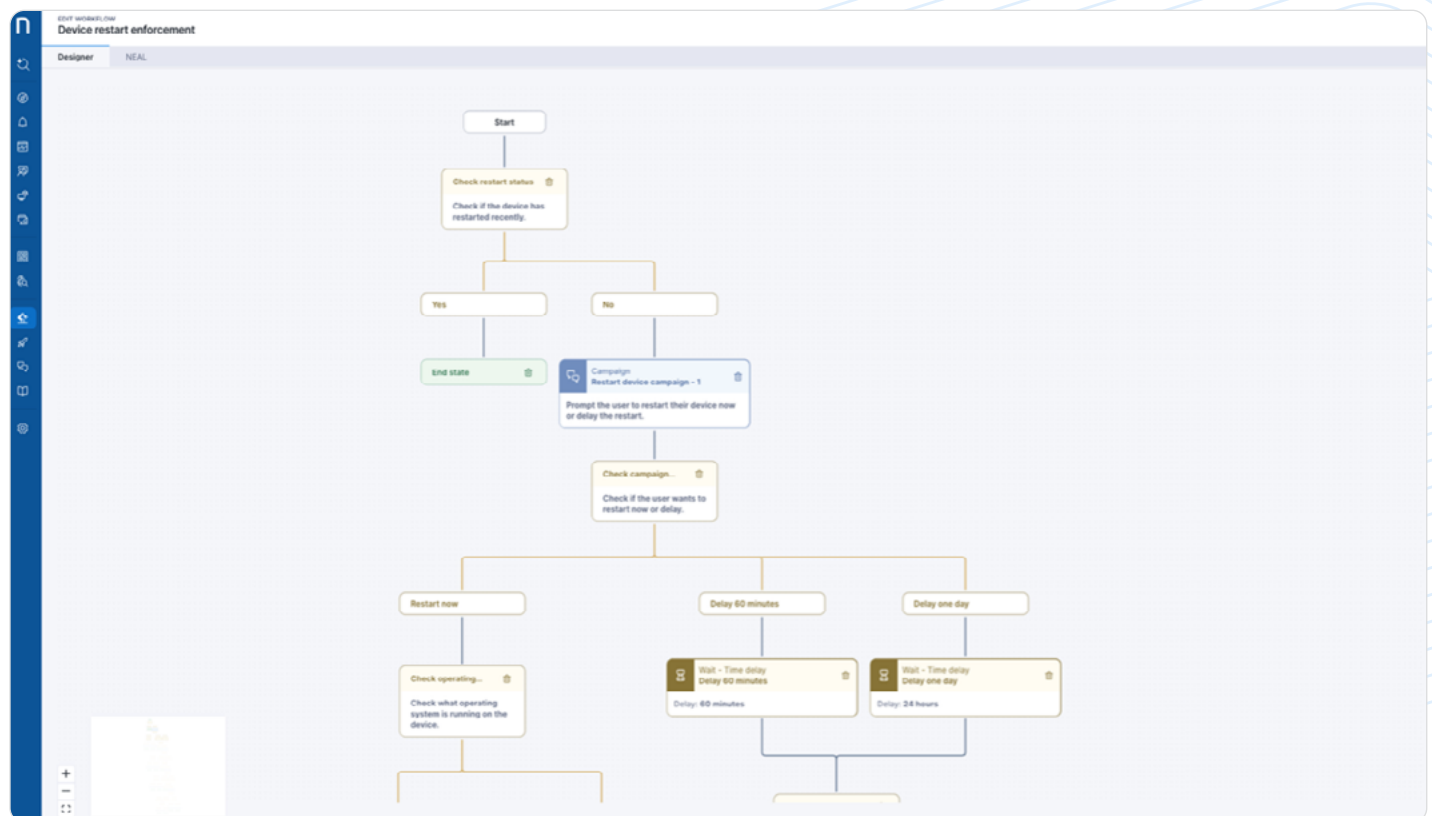
Expanding the scope of who can automate maximizes what can be achieved against shrinking budgets and teams.

Do empower every IT role.

Those closest to the pain, like L1 and L2 agents, often know best how to solve it. Don't limit your automation capabilities to a small group of experts. Empower more IT players like L1 and L2 agents to implement automation. The easy-to-use interfaces and lower reliance on well-honed scripting skills that come with low code automation tools like Nexthink Flow can enable more members of your team to create workable solutions to problems. 30+ out-of-the-box library packs that include workflows and remote actions further enable less experienced team members to create automations with greater efficiency and fewer errors.

Don't underestimate your teams.

With the right tool, **anyone can automate**. Those who are the closest to the problem and pain will have the highest drive and determination to make it go away. They are also the ones who know the problem and the process behind it better than anyone else. Keeping automation responsibilities restricted to a small set group of resources will only serve as a bottleneck to your automation strategy. Utilize granular permissions to ensure team members only access what they need to contribute to your automation strategy.



03. What to Automate

When it comes to automation, don't dive in without first knowing where you are going and what tools can get you there.

Don't reinvent the wheel.

Your business and your problems aren't as unique as you think. Nexthink has distilled the most frequent IT pain points into 30+ prebuilt library packs, complete with end-to-end automated workflows, real-time signal triggers, remote actions, employee engagement campaigns, third-party integrations, and customized dashboards.





As you explore at the latest library packs that have been created, you can begin to understand the type of issues you can fully resolve with end-to-end automation:

Whether it is a device health, license reclamation, or compliance use case, customizable out-of-the-box workflows give you the opportunity to accelerate ROI and inform your own automation roadmap.

Do think long term.

Today, you may have longer remote action scripts that have many steps to troubleshoot an issue. However, Flow is designed to use shorter remote action scripts with the logic built out in the workflow separately. While it may take some time to break these scripts into smaller sections, the shorter remote actions can be used as workflow building blocks and make the workflow much easier to edit. Plus, they will save time because they can be reused across workflows.

Flow Pre-Built Library Packs

Category	Key Outcome	Example Library Packs
 Troubleshooting & Remediation	Reduce MTTR, deflect tickets, improve employee experience	Outlook, MS Teams, VPN, OneDrive, Call Quality, PC Crash, Slow PC
 Device & Endpoint Management	Ensure stability, enable upgrades, reduce disruption	SCCM, Intune, Windows 11 Migration, Restart Enforcement, Device Assignment
 Access & Identity Automation	Automate credential workflows, improve security	Password Reset, Password Expiry, Local Admin Permissions, macOS Lock
 Employee Lifecycle Automation	Eliminate repetitive tasks, enable scalable automation	Automatic Ticket Closure, Battery Scheduling, Workflow Construction Kit

04. Where to Automate

Expand beyond the automation tool with integrations into chatbots, virtual agents, and service portals. Go beyond deflection by triggering real-time diagnosis and remediation through natural language and direct employee engagement. Use integrations to keep things simple and avoid unnecessary automations.

Don't over centralize a solution.

Rather than looking to replace other applications, use your automation tool to enhance and fill gaps. Utilize the integration capabilities of your automation tool to bridge missing elements in your existing portfolio. With Flow, you can start with pre-defined connectors for API integrations like ServiceNow and Microsoft Entra ID by adding the Connector Thinklets directly into your workflow.

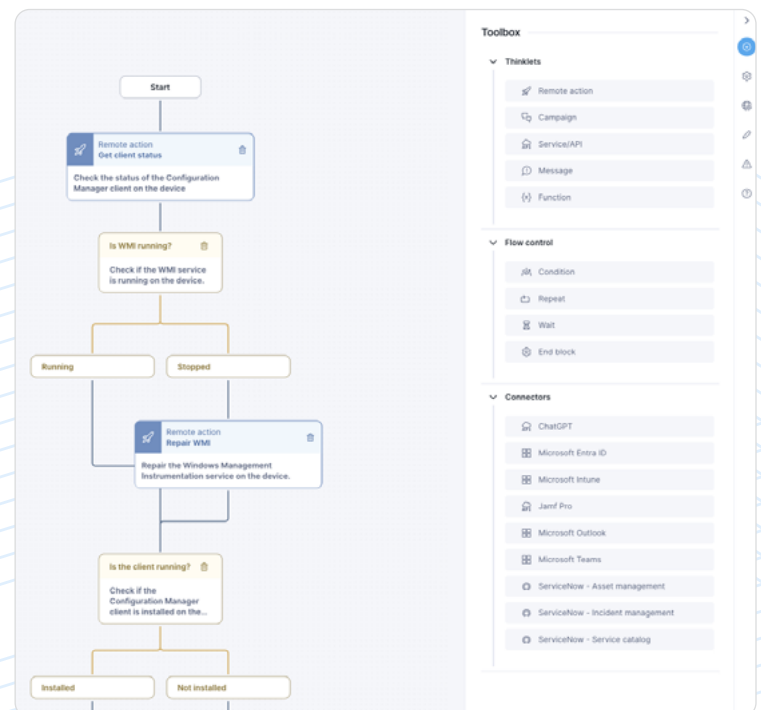
Do look for targeted opportunities.

One problem or use case can require many automations. You can't solve onboarding with one workflow. A better approach is to focus on smaller improvements, like identifying the key parts of the onboarding process where automation can make a difference.

If you currently have an onboarding process that requires IT to check that the new employee has all the necessary software with proper configurations in place, you could automatically perform those checks, correct any missing configurations, and then follow up with an automated message to collect feedback about their experience.

Don't overstep.

Some things are best left with the tools and teams that know them best. With onboarding, for example, the HR team has strict regulations and processes that should be considered in your automations. Use integrations to gather data without automating core regulations that already work well. There is no need to fix what isn't broken.



05. How to Automate

Automation only succeeds when it's driven by contextual signals and real-time insights. With tools like Nexthink Flow, you can fix friction before it spreads by leveraging real-time data across your IT services, hardware, applications, and employee actions to trigger automated remediation.

Don't run automations unnecessarily.

Just because you can automate, doesn't mean you should. Avoid executing unnecessary workflows and instead, only execute workflows as needed. By defining workflow parameters and selecting conditions, you can avoid over-triggering. This will give you less data to sort through and keep your reports actionable, making it easier to understand workflow outcomes and identify improvements.

Do respond in real-time.

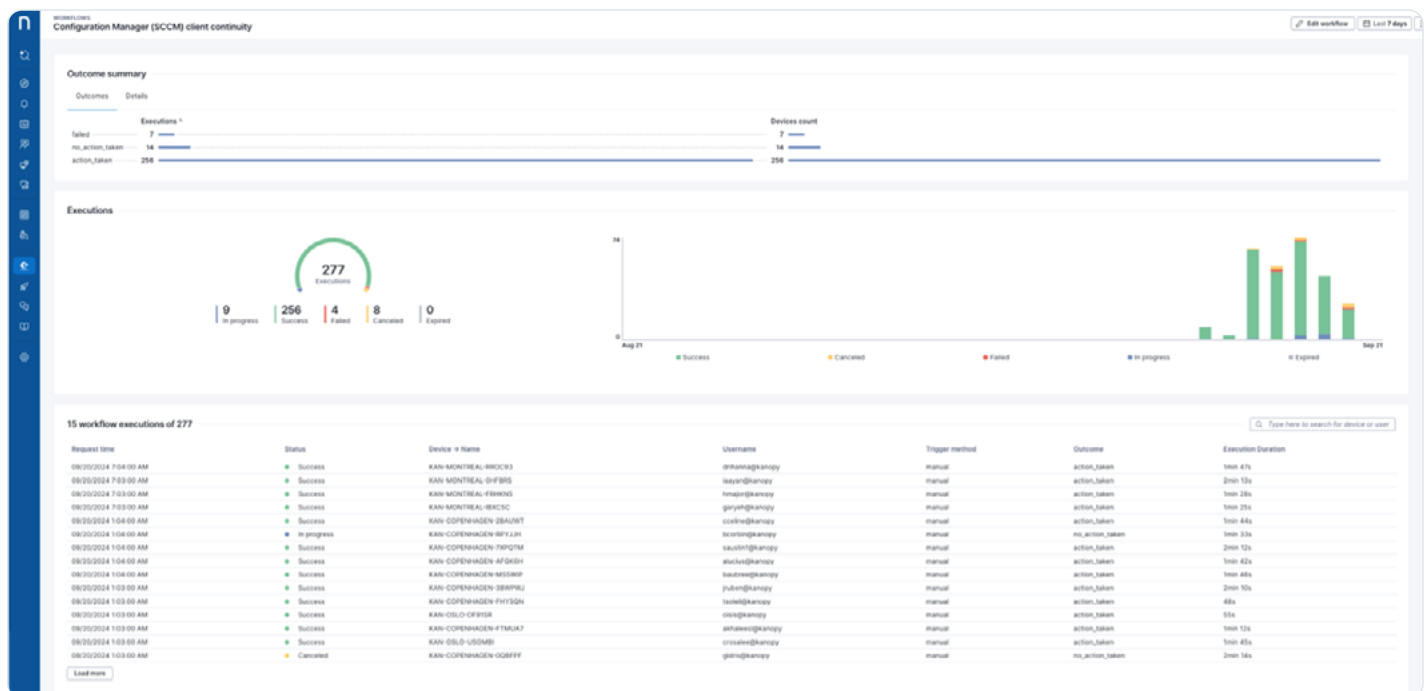
If an issue impacts employee experience or compliance, it should be responded to in real-time. With a tool like Nexthink Flow, you can trigger automated workflows off real-time events like a device, end user, or Nexthink event ensuring a proactive response to outages, security risks, and other impactful and highly visible events.

Do set the right cadence.

Not every task needs an instant trigger. For predictable jobs like license reclamation, battery replacement, or device restart enforcement, use scheduled or manual triggers. With the time appropriate trigger, you can avoid a massive, complicated, and unworkable data set.

Don't bypass testing.

Execute your automated workflows in your test environment. Not only is this a great way to identify issues and areas of improvement, but it also gives you the data you need to prove the value and impact of a new workflow.



06. When to Automate

Deciding whether you and your team should automate depends on a few key factors.

Don't automate for the sake of automating.

If your team is dealing with unstable systems that require constant script updates or unpredictable third-party data that can't be trusted, it's not worth the time to build the automations for systems or data in flux. Additionally, short term projects may require more work than they are worth given the short time frame.

Do automate strategically.

If your team is completing repetitive tasks, spending time on increasingly complex issues, and wasting money or being pushed to cut costs, automation can help push your team to shift from supporting the business to delivering measurable ROI and focusing on innovative organizational goals.



07. Conclusion

Given the increasing complexity of technology and the growing interest in AI-driven solutions, your team must adopt proactive end-to-end automation powered by real-time signals and contextual reasoning to boost efficiency and cost-effectiveness. Automation can help your team move from manual problem-solving to solving issues proactively with continuous engineering. If you do understand the who, what, where, when, why, and how of automation, it will ensure you don't run into common pitfalls like lack of training, planning, and governance. With the who, what, where, when, why, and how of automation clearly defined, you're ready to design, deploy, and scale your automation strategy today with Nexthink Flow.

About Nexthink Flow

Nexthink Flow combines AI-powered data with a low code automation engine that enables IT to proactively resolve issues and prevent disruptions with automated workflows, real-time signals, and third-party connectors and APIs. Resolve issues instantly and prevent disruptions before they occur with automation across every system and interface, from virtual desktops to chatbots and all the applications in between. Extend the reach of DEX and act on signals in real-time with third party integrations and connectors for critical use cases across ticketing, collaboration, and config platforms. Learn more at www.nexthink.com/platform/flow.

About Nexthink

Nexthink is the global leader in Digital Employee Experience management. The company's products allow enterprises to create highly productive digital workplaces for their employees by delivering optimal end-user experiences. Through a unique combination of real-time analytics, automation and employee feedback across all endpoints, Nexthink helps IT teams meet the needs of the modern digital workplace.

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Want to learn more about how Nexthink can
help you improve employee experience?