
AUTOMATION

Automation is something we have worked on diligently by studying various methodologies, including PMI (Project Management International). The phases on which we have carried out automation are as follows:

1- Analysis

At this point, we analyzed all the tasks performed within Smart and measured the time required for each. These tasks were classified by type (administrative, advisory, etc.), importance (priority or not), and risks associated with not performing them correctly. Once this analysis was completed, a detailed report was prepared to help us make decisions regarding automation.

2- Systematization

Systematization was carried out in three stages:

- Team training:

Having a deeper knowledge of the subject helps us become more resourceful and optimize time, while also preventing psychosocial injuries caused by stress. In this phase, we created the Wiki, which contains everything necessary for daily work, from CRM usage to administration and member management. This saves time by eliminating the need to search for information or solve doubts.

- Protocolization:

During this stage, work protocols were created, enabling us to optimize time, work in a standardized manner, and improve work systems focused on enhancing project productivity and profitability.

- Archiving and documentation:

We established a file system, thanks to our member who is an expert in archiving and documentation. This system allows us to find a document in less than 10 seconds. With the CRM, members have access to all the documentation. In the example, you can see my username is hidden for data protection reasons. It's not that I have extensive activity as a user, but the member can:

AUTOMATION

- Access to all documents.
- Personal identification data and bank accounts, where members can make changes directly.
- Breakdown of their work with Smart Ibérica.
- Cost simulator.

In addition, we have a shared file system on MS Teams where cooperative registration documentation is stored. Reducing the search time for information and documentation to 10 seconds resulted in a 90% increase in productivity.

3. Technology

As you can see in the infographic, we have been trying to develop our own software since 2015. This has involved a significant amount of money. Although it may not have been spent directly, at Smart Ibérica, we firmly believe that time is money. Therefore, considering the time and economic resources invested in developing our own automation tool, the figure exceeds €700,000.

The first tool was developed by Julek.

The second tool was developed by a Spanish provider with whom we are currently in legal disputes, as they are requesting additional payment for a program that does not function properly.

We understand that automation should serve to reduce time for all members, not to take away working time from advisors and transfer it to members. This makes us non-competitive in the market and is not ethical in cooperative terms.

The main problem encountered is that they cannot integrate it with our CRM. The CRM is authorized by the public administration for integration, and if the program generates any errors in calculating an invoice, payroll, etc., they are responsible and have insurance to cover any financial losses incurred. This provides security for the cooperative.

AUTOMATION

However, thanks to the CRM, we have automation for accounting and payroll. If it doesn't connect with the self-management program, we are automating on one side while forcing manual tasks on the other side, which carries a higher level of risk. For example, if the program manages invoices but the accounting team has to handle them manually, not only are we investing more time in that task, but we also risk more human errors that could cost our cooperative money.

Furthermore, according to the recommendations of our data protection delegate, European data protection law requires us to conduct a cybersecurity report. For this purpose, we engaged CINDE.

In conclusion, the maintenance and management costs amounted to €32,000 per year in the best-case scenario. This includes platform maintenance and updates, 24/7 on-call personnel to address any IT errors and prevent issues, the purchase of two independent servers for backup purposes, database dumping and secure storage, implementation of cybersecurity protocols for various cybercrime scenarios, and more. It's not just about the money; it's about whether we are capable of managing our own program of such complexity if we are already facing issues with Office 365.

In response to this situation, in 2022, we contacted CINDE again to conduct a cybersecurity audit. The result of that report was very favorable because by outsourcing the CRM and using Office 365, there is a third-party responsibility that allows us to demand accountability and limits our liability.

The option to automate through a tool that we know works, such as the CRM, is not only the most practical and secure but also the most effective.
