



# We're All Human:

## How to Avoid Letting Your Tech Get the Best of You

A PDI Technology Guide with 6 Simple Steps toward Automation



# Executive Overview

Introducing new enterprise-level software is no easy task. Legacy custom systems with very basic functionality or even good-old spreadsheets with countless fragile macros seem so outdated yet so attractive in the complacent mindset of “we’ve always done it this way.” However, the past few years have only increased the pace of change in our industry: ongoing M&A, accelerated digital transformation, and growing pressure to understand where to prioritize investments and how to ensure profitability.

Successful organizations can remain successful by “creating hunger in paradise.” One of the tips Rasmus Ankersen, creator of the theory, gives to successful companies is: “If it ain’t broke, consider breaking it.” Oftentimes, going through the process of migrating and implementing technology solutions is completely worth the effort. The reasons are many. From retaining talent and avoiding human error to increasing enterprise productivity and customer satisfaction, the benefits usually outweigh the challenges.

**This guide outlines some best practices for moving toward automation in six simple steps.**

1. Set Clear Expectations
2. Understand Your Ecosystem
3. Clean Up Your Data
4. Bring Your Employees on Board
5. Ramp Up on Resources
6. Trust Your Systems and Account for Human Error



## 1 Set Clear Expectations

Published in the [New York Times](#) on September 13, 1970, Nobel prize-winning economist Milton Friedman made the controversial statement that “The social responsibility of business is to increase its profits.” Almost 50 years later, the Business Roundtable issued its [“Statement on the Purpose of a Corporation.”](#) Signed by 181 CEOs, the statement declared a fundamental commitment to all stakeholders, including customers, employees, suppliers, communities, and shareholders.

The “Statement on the Purpose of a Corporation” was signed, among others, by BP, Chevron, ConocoPhillips, ExxonMobil, Marathon Petroleum, Phillips 66, and World Fuel Services



ExxonMobil

ConocoPhillips



Bottom line (pun intended), it’s healthy for businesses to want to increase their bottom line while upholding their values, vision, and mission. That seems like a crystal-clear expectation these days. The reality is, it’s a bit more complicated and not a one-size-fits-all approach.

The purpose, as explained earlier, indicates the “what” that needs to be defined by the “how.” A few examples of how you may want to optimize your business and achieve operational excellence with the help of technology could be to:

- Increase fuel volumes or profit margins
- Improve customer satisfaction and retention with automated ordering, timely deliveries, and prompt support
- Choose automation over manual processes for repetitive and tedious tasks, such as reconciliation
- Save time and material by going paperless
- Increase employee productivity and satisfaction

To ensure you’re using your technology to reach your goals, it’s important to be clear on what those goals are. Otherwise, you risk falling into the category of businesses that implement technology but are never sure whether their initiatives were successful. In this quest, you’re not alone, as you can rely on industry experts from supplier companies to help you understand the tangible benefits of introducing more process automation and optimization.



## 2 Understand Your Ecosystem

Depending on the business vertical you serve, you most likely have one or more systems that cover key functions such as financials, pricing, inventory management, planning, and dispatch. On top of that, you may have customer-facing functions such as a customer portal for ordering and support, and the list goes on.

Understanding your ecosystem goes beyond just knowing what point-products you use internally to run your business and trying to reconcile the information you get from each system into one consolidated view. The true benefits of technology emerge when you can break the information silos that have haunted the industry since the beginning of time. The need for solutions that “talk” to each other is often underestimated, yet bringing all of it together into a seamless experience and one version of the truth can propel your business to an entirely new level of operational excellence.

Very often, you’ll find your business needing to communicate with third-party systems: the central ERP system of your wholesale customers, Terminal Automation Systems, Automated Tank Gauging, and truck and trailer electronics, to name but a few. To make sense of your technology ecosystem, data needs to flow with speed and accuracy between the various applications, internal and external. Data changes performed in one system need to trigger instant updates across any other relevant data consumption points that use the same information. This is where a common data lake or well-written interfaces would help.

Modernizing your business with automation and flexible offerings built on an agile, cloud-based platform can help you reduce friction and overcome data silos. And it can also free you from worrying about complex manual tasks and technical barriers so you can focus more on meeting your commitments to all stakeholders—including customers, employees, suppliers, communities, and shareholders.



### 3 Clean Up Your Data

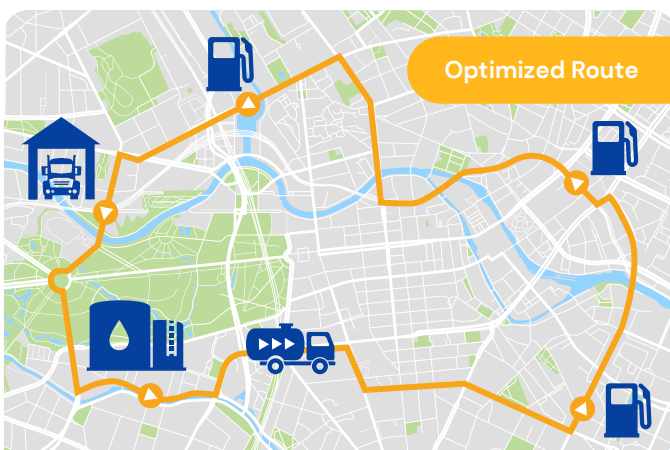
One of the first items on the to-do list when implementing new software is to provide your new system with data. Whether this happens through interfaces to other existing or incumbent systems or special files for import, your software provider will be able to help you with this process.

If you think your data is good enough and you don't need to go through that process, think twice. In 2017, participants of an executive program in Ireland were asked to assemble 100 random data records and look through them with their teams, locating obvious errors.

The results were shocking: Only 3% of companies' data met basic quality standards, based on the researchers' article in the [Harvard Business Review](#). Trying to quantify what this means in terms of actual cost for the business, the writers suggested that "it costs ten times as much to complete a unit of work when the data are flawed in any way as it does when they are perfect."

Data hygiene helps you prepare for new software implementations or migrations, but it's much more than that. It also makes your systems more effective and accurate. In the context of "we are what we eat," your system will only be as good as the data you "feed" it. Details that initially seem to be vanity data can elevate your operational efficiency, for example, if taken into account by [machine learning capabilities](#) within your new software. At the same time, human errors can lead to inefficiencies and baffled users that think their technology is misbehaving.

**Did You Know:** The exact location of a retail site on the map can have a major impact on the optimization of a delivery sequence, highlighting the importance of accurate master data.

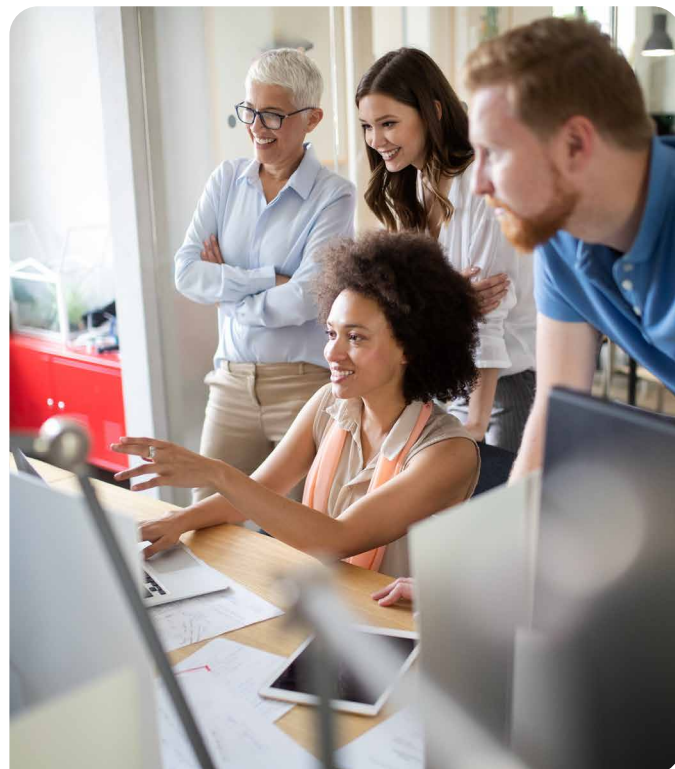


## 4 Bring Your Employees On Board

An African proverb says, “If you want to go fast, go alone; if you want to go far, go together.” It couldn’t be truer when it comes to the benefits of teamwork, but also to the combination of human and machine capabilities, which is called “augmented intelligence.” The key is to take advantage of typical human strengths—such as experience, flexibility, and common sense—while using technology to automate repetitious and time-consuming tasks.

It’s human nature to be reluctant or feel overwhelmed when faced with big changes. Selecting and implementing new enterprise-level software is a significant undertaking for any company and any team. So, what can you do to simplify the change management process?

Explain to your employees that you’re not seeking to replace them, but rather enhancing and complementing their performance with effective tools. The human mind is a great tool, but it doesn’t allow for scaling and seamless communication. Make your employees part of the selection and implementation process so they can see first-hand the benefits they’ll reap when the new software is up and running.



For example, your accounts receivable department will see their burden reduced by the easy-to-use, self-service tools available on the customer portal. Exception-based reporting will focus everyone’s attention on critical issues and free them to spend time where it matters most: on your customers. Your pricing analysts will feel empowered when they can react faster to accurately manage price changes. A key factor to a successful software implementation is having your workforce motivated and at your side.



## 5 Ramp Up on Resources

Enterprise software is rarely a plug-and-play process and for good reason, as it reflects the complexity of modern business environments. Even when innovative software suppliers have managed to reduce ramp-up times and keep distractions to a minimum, you and your employees will have to handle your daily operations in parallel with migrating to or implementing new technology. This can be a difficult stretch even for the most motivated team.

This is where you might need to augment your human capital by leveraging your software provider's professional services. Why? Their employees typically have many years of industry experience, they have better knowledge of the system, and they have a holistic understanding of best practices based on other customer implementations. Using their expertise will increase your capacity without increasing your headcount.

The benefits of this approach are numerous. From the initial stages of the buying process to long after the first implementation, a business review will uncover potential efficiencies through new software features or automation tasks. By using disciplined approaches, proven project methods, and quality assurance milestones, the team working on your implementation project will set you up for success. And along the way, your employees will be trained by experts to increase their comfort level with the new software.

## 6 Trust Your Systems and Account for Human Error

Apart from the benefits mentioned so far, industry-specific enterprise software can help prevent and pinpoint human error. Here are a few ways your software can help you achieve that:

- Business logic of “managing by exception”
- Customizable alerts
- Automated plausibility checks
- Adjustable soft and hard constraints
- Extensive logging capabilities
- Perpetual auditing readiness

It's important for any individual with great business acumen to understand the breakpoint of human error. When something doesn't work as we're expecting it to, we often blame it on system issues. Yet a closer look from a support agent might reveal a different culprit. Dealing with new technology can cause uncertainty when things don't go as anticipated. Trusting that your systems are effective and accurate at what they do and realizing that mistakes are a lovely trait of human nature can potentially save you a lot of time and energy when investigating discrepancies.



## Start Your Technology Transformation

Innovative PDI technology solutions help you make the most of the limited time and resources at your disposal, empowering you to increase innovation, outpace your competition, and leverage meaningful data to make more strategic business decisions.

Contact us to start your transformation journey today! [www.pdistechnologies.com](http://www.pdistechnologies.com).

## About PDI

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