

Guide

Choosing an automation partner

A practical guide for South African business owners

This guide provides a practical, step-by-step roadmap for SMEs.
It's structured in three key phases to help you navigate from initial
preparation to long-term performance.

The automation dilemma

“ I don't have time to work this all out

Establishing business rules can feel like an overwhelming task

“ I'm worried about falling behind

Competitors are moving on efficiency and cost

“ I can't risk our data or our team

Security, privacy and staff resistance are fair concerns

What a good process looks like



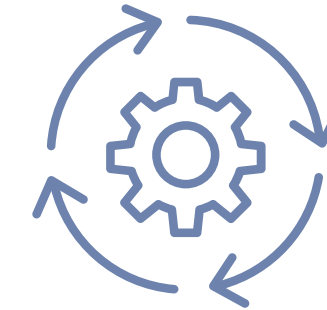
PHASE 1: PREPARATION

Map your processes

A competent consultant will help you to document your workflows

Map your reality, not the ideal

Gather real examples, including messy inputs, missing information, and odd edge cases, using screenshots as well as explanations. A clean description is no match for real-world complexity when it comes to accurate quoting and proper testing so don't be afraid to show imperfection.



**The clearer you are upfront
the less time is spent on basics later**

A good consultant will examine and help you to map where the work starts, who touches it and which systems are involved before any solutions are discussed

PHASE 1: PREPARATION

Define "good"

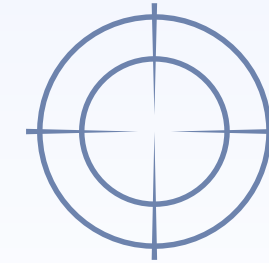
Translate vague frustrations into concrete figures an agency can use

Quantify the effort

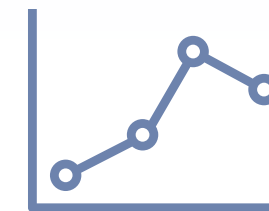
Instead of "this takes a lot of time," use "this takes around ten hours a week." Calculate the cost of that time and where errors typically creep in.

Define success

Be clear about your goals to avoid misunderstandings. Vague aims like "make it more efficient" can mean different things to different people.



Target
turnaround time



Acceptable
accuracy range



Reduction in
manual errors

PHASE 1: PREPARATION

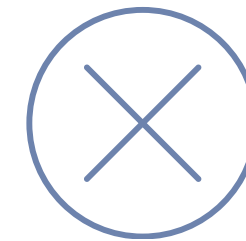
Check your foundations

Automation is a powerful tool, but it doesn't solve underlying chaos.

Think through system connections.

A good consultant will stay realistic about what automation can and cannot do.

List the key software involved (CRMs, accounting tools, email platforms) as knowing their integration options reduces surprises later



Automation is NOT a good fit for:

-  Processes that are unstable or constantly changing
-  Inputs that vary wildly without clear rules
-  Decisions that rely heavily on human judgment or personal relationships

PHASE 2: PARTNERSHIP

Structure the engagement

Choosing the right partner is about looking for substance over shine

Start with one process that genuinely repeats

Choose something done dozens of times a month under roughly the same rules

- ⊕ Sorting leads
- ⊕ Pulling data from documents
- ⊕ Generating reports
- ⊕ Booking appointments
- ⊕ Assembling proposals



Test the relationship on the first step

A paid discovery phase is a good way to assess an agency.

The quality of their documentation and their grasp of your business reality will predict the success of a full build.

Fixed scope reduces friction

Compared to open-ended hourly work, fixed-scope pricing is easier to manage

PHASE 2: PARTNERSHIP

Own your solution

Your data, your system, and the warning signs

Ask before any work starts

Where is our data processed, who controls it, how is it protected, and who owns the finished workflows, code and documentation.

Clarify ownership before work begins.

A reputable agency will be transparent about the ownership of the finished system (code, workflows, documentation)

Ensure the arrangement is understood before work starts



Warning signs

- ⊗ A price quoted before they have seen your real data
- ⊗ Broad claims about AI with no grasp of your process
- ⊗ Vagueness about the technology, pricing you cannot follow.

PHASE 3: PERFORMANCE

Anticipate change management

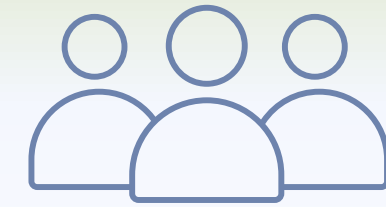
Build for adoption, then test it properly

Involve the team

The people doing the work should help document, test and refine it. When automation is imposed, resistance shows up quietly as workarounds.

Phase in the changes

Run the automation alongside the manual process for a period. Parallel testing builds confidence and surfaces the small issues before you rely on the system.



A successful automation project doesn't end at launch

When the people doing the work are involved in documenting, testing, and refining the automation, adoption is significantly smoother.

PHASE 3: PERFORMANCE

Handover and ongoing care

Build for adoption, then test it properly

Follow up

Training and documentation matter as much as the build. Your team should be comfortable monitoring the system, handling common issues, and knowing when to ask.

Plan for maintainance

Automations need monitoring and adjustment as the systems around them change. Anyone saying otherwise is oversimplifying the truth in order to get your work.

Curious to find
out more?

Book a call to get started
luminoautomate.com