

Ten Automations Every Business Team Should Build First

Credits 2.0	Field of Study Computer Software and Applications	Course Category General	Level Basic
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COURSE DESCRIPTION

Many finance teams feel the weight of manual data entry but aren't sure which thread to pull first. They often stall out by picking projects that are too complex or yield too little return. This session cuts through the noise by focusing on ten specific, high-impact automations that solve the most common bottlenecks in the office. The firm will see how to connect bank feeds for instant reconciliations, set up automated approval routing that won't get lost in email, and sync journal entries from external tools without a single copy-paste. By focusing on these foundational wins, teams can stop being data processors and start being analysts. The session provides a clear, actionable roadmap to build a more responsive finance function using the tools they already own. Practitioners will leave with a prioritized checklist of projects that they can start implementing the very next morning.

LEARNING OBJECTIVES

- Identify the ten most impactful automation points that eliminate repetitive data entry in a standard finance workflow.
- Execute the technical steps to connect bank data directly to the general ledger for daily reconciliation.
- Construct logic rules that automate the routing of expense and invoice approvals to the right stakeholders.
- Build a reliable workflow to synchronize journal entry data between specialized billing tools and the primary accounting system.
- Rank manual processes for automation based on a specific framework of volume, error risk, and time savings.

MAJOR TOPICS

- The automation hierarchy: What to build now versus what to build later
- Connecting and troubleshooting automated bank feeds for real-time visibility
- Streamlining the accounts payable cycle through automated approval triggers
- Integrating payroll and benefits data to eliminate manual journal entries
- Building automated alerts for budget variances and unusual transactions
- Connecting CRM sales data to financial records for faster invoicing
- Modernizing expense management through direct software integrations
- Automating the collection of tax documentation and vendor certificates
- Managing data flow between inventory systems and the core ledger
- Creating a simple maintenance schedule to keep integrations running smoothly

ADDITIONAL INFORMATION

- **Who Should Attend:** Accounting managers, controllers, and operations leads who aren't afraid to get their hands dirty to increase departmental efficiency through practical software connections.
- **Prerequisites:** Basic familiarity with cloud-based accounting systems and a fundamental understanding of how data moves between different software platforms.
- **Advanced Preparation:** None
- **Tags:** automation, integration, productivity, accounting technology, workflow, efficiency
- **Course ID:** 2210
- **Short Name:** Ten Essential Automations

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