Red Hat

6 steps for getting started with automation

Regardless of the technical role you play in your organization, you have the opportunity to lead and develop a set of standard best practices that can later be adopted and scaled across different teams. This checklist is a guide to help lay a solid foundation at the start of your automation journey with a few simplified considerations to help you realize the time-valued benefits of automation.

1 Establish best practices

Think like a software developer

Working in sprints with smaller release cycles and closely monitoring Ansible® content version control will help you reap the benefits of automation sooner.

Start small but think big

Avoid taking on the most complex automation use cases before the right processes and behaviors are in place. Typically, our customers start automating a handful of minor tasks and build from there.

Assess your IT organization's experience

Get a sense of your team's Ansible skills by rating the team's current level of experience creating Ansible content. This includes playbooks, modules, roles, and plug-ins.

Use the scale below to identify your team's level of Ansible expertise.

1. *None:* Team has never created Ansible content.

2. *Beginner:* Team has written some Ansible content.

3. *Intermediate:* Some team members are comfortable, but others need additional training.

4. *Advanced:* Team has years of experience developing content and can assist others.

Develop a community of practice (CoP)

Create a space to share ideas, best practices, and automation content. Cross-functional collaboration and knowledge sharing is an essential part to scaling automation.

Find out more in this guide to CoPs.

2 Discover and define

Your most valuable work will happen when you align automation goals to business objectives to ensure that they fit into your organization's long-term strategy. It is important to set realistic expectations. Take some time to understand where you are now, and which use cases you want to prioritize.

What are your top IT challenges?

Some common IT challenges may include:

▶ Inconsistent software updates across systems.

▶ Approval processes causing provisioning delays.

▶ Spending a lot of time on support issues.

▶ Documenting and auditing change control for compliance requirements.

Some common obstacles to automation may include:

▶ Too many different automation solutions in use.

▶ Hard to share and reuse automation across the organization.

▶ Facilitating proactive collaboration across automation domains.

What are your top business goals?

Identify which organizational goals to align your automation goals with. Some common business goals are to increase revenue, reduce risk, increase agility, improve customer experience, and improve productivity and efficiency.

Your organization may also be looking to launch new applications, accelerate time to market, or reduce costs in a particular area.

3 Select tasks to automate

To help focus your automation efforts, ask these 2 questions:

1. Are there any key executive initiatives that can be improved with automation?

2. What simple but repetitive manual processes could be automated first to deliver value and demonstrate efficient results?

Narrow down your answer to a list of 3-5 small but important tasks that are aligned with your organization's business goals that will also solve (or lessen the burden of) one of your identified manual challenges or processes.

Pick a use case that will likely succeed

While you want to find a use case that will demonstrate a clear return on investment (ROI) on your automation efforts, you do not want one that is overly complicated.

Think in terms of short, iterative progress where you can establish early success and share what you learn with your peers and leadership teams.

If you select a use case that sits within the domain of a single team, you avoid early complications by automating processes and workflows over which they have complete control. This initial team can become automation subject matter experts and train other teams.

4 Forecast your savings

Once you establish a priority list of automation tasks, you can use automation analytics within Red Hat® Ansible® Automation Platform to help you plan and predict the time and cost savings for each automation task.

Use the savings planner tool to help compare various projects

against one another. This can help you prioritize work that is reasonably simple to execute but will have a big effect.

For more on this, read the blog post "How to forecast and track your automation ROI."

Note: You will need to connect your data to console.redhat.com. Learn how.

5 Create your first playbook

Ansible Automation Platform comes with 2 types of content to help you get up and running faster: Red Hat Ansible Certified Content and Ansible validated content. Content can be shared with network, security, operations, developers, and infrastructure teams so that everyone can benefit.

Red Hat Ansible Certified Content helps you automate more than 140 industry platforms and solutions, such as Red Hat Enterprise Linux®, ServiceNow, Palo Alto Networks, F5, Microsoft Azure, and more.

Ansible validated content offers an expert-led approach to performing common operational tasks for clouds, networks, security, and more. Validated content is customizable so you can play with it and learn from it as you use it.

6 Track your success

Use the Reports dashboard to track job success and identify what automation is currently in use. Automation Calculator measures ROI in terms of cost and time savings.

▸ Log in to automation analytics to measure the results of your automation.

▸ Remember to share results with your leadership and your peers to prove the value of automation.

Get started

Check out our many resources to help you get started, including a video tour, technical training, and more.

Try a hands-on lab

Experience a self-paced interactive lab where you work on real-world scenarios and solve IT challenges.

About Red Hat

Red Hat helps customers standardize across environments, develop cloud-native applications, and integrate, automate, secure, and manage complex environments with award-winning support, training, and consulting services.

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