



Why Automate Your Workflow

The Pitfalls of Manual Workflow Management



Section
01

Why Automate
Your Workflow?

The Pitfalls of Manual Workflow Management

Manual workflows are still surprisingly common in large and small organizations, despite ongoing advancements in workflow automation systems. Companies of all sizes still rely on paper or Word/Excel forms to collect information and then route it via email or shared drives for review/approval/reporting.

There are many reasons for this lag in embracing the benefits of automation, including:

- ❑ Lack of management visibility into inefficiencies of existing processes
- ❑ Assumption that workflow or process automation must be a resource-intensive, multi-year project
- ❑ Staff reluctance to learn new systems and to permit more visibility into their work
- ❑ Erroneous management perception that workflow automation is too expensive and time-consuming to implement
- ❑ Concern about lack of developer resources to implement and maintain customized forms and integration

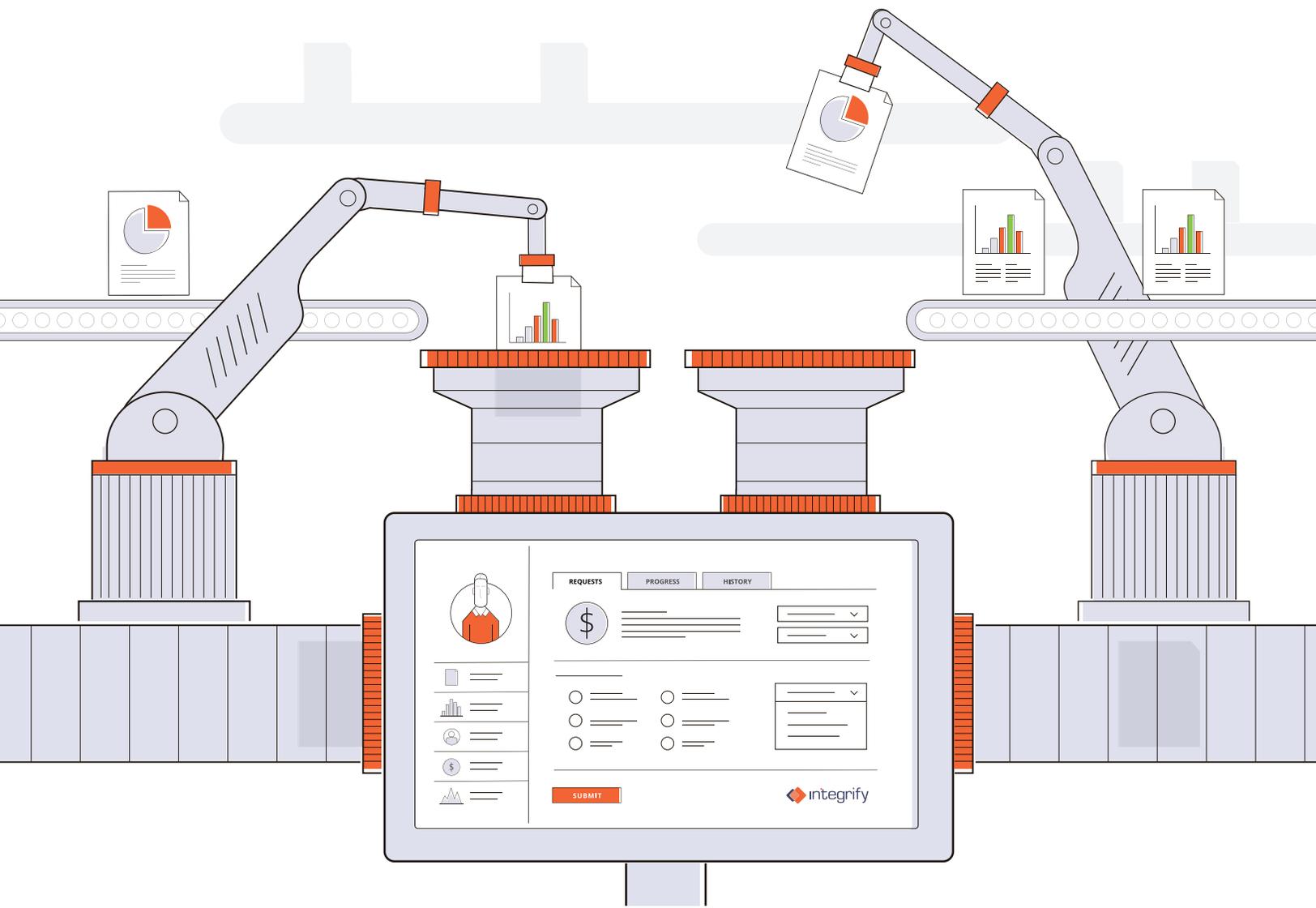
Mired in these misunderstandings, organizations cling to archaic methods that are fraught with costly business risks:

- ❑ Email chains that stall processes by causing delays and confusion when handoffs are missed
- ❑ Re-keying information from paper records or separate systems that causes errors and delays
- ❑ Shared drive collaboration that loses version control causing rework and delays
- ❑ Relying on each employee's own task management system to ensure deadlines are met
- ❑ Operating blindly, without audit trails or accountability
- ❑ Building resource-intensive, homegrown systems that underperform and require constant maintenance

It's easy to see how these manual processes create inefficiencies and inconsistent results across the organization. Efficiency declines as the task completion timeframe increases due to mistakes, misunderstanding, email back-and-forth, and rework. Manual processes also impair management's visibility into actual company performance and their ability to correct any issues.

The additional burden created by inefficient workflow locks the organization in a self-perpetuating ritual. "We wish we had time to fix this process disaster, but we are so busy using it that we can't take the time to implement a solution."

It's time to take steps to break this endless cycle.



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Workflow Automation: What is it?

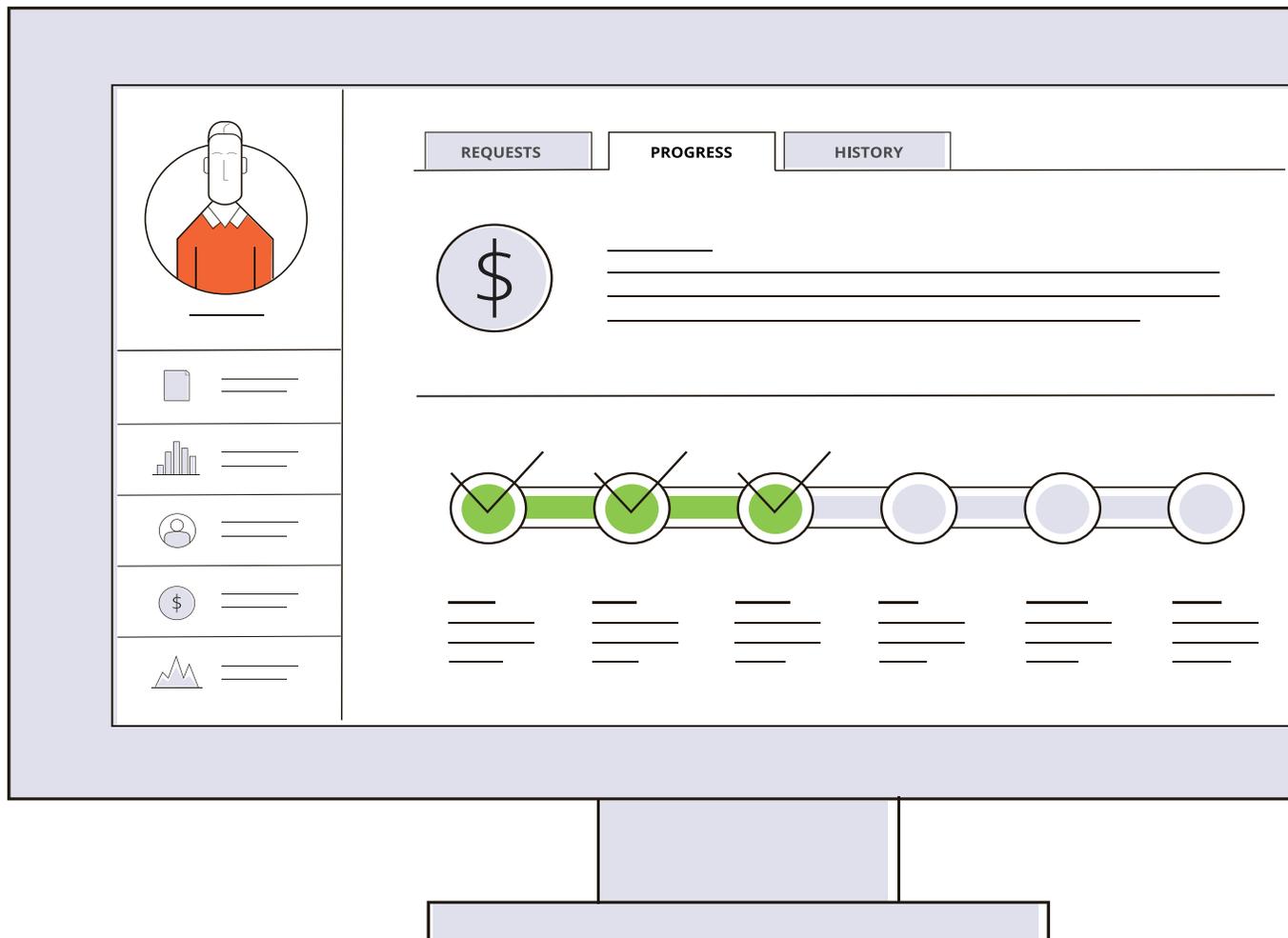
Introduction

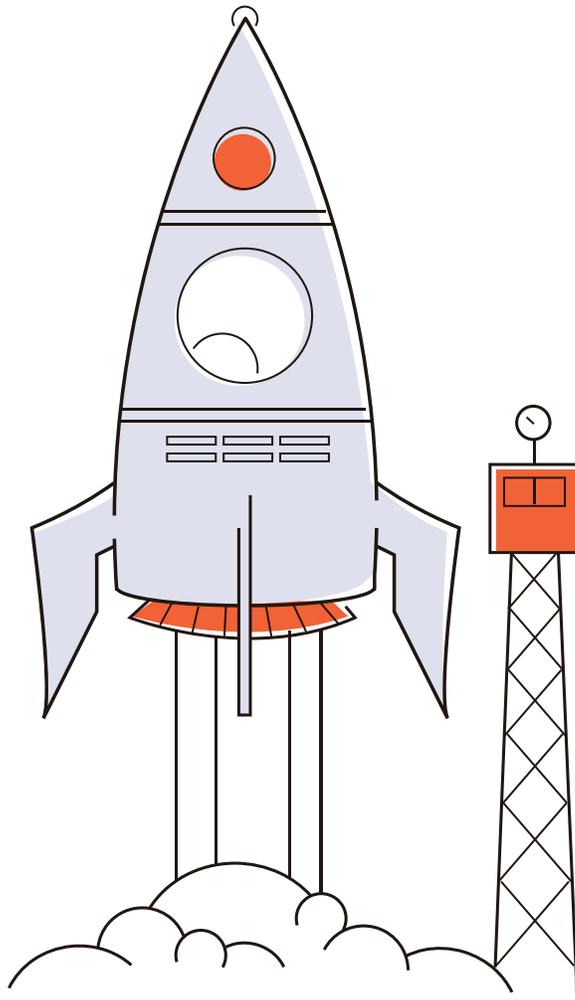
Workflow automation enables employees in an organization to perform their assigned tasks via pre-built processes and forms. When there are handoffs from one employee or department to another the workflow automation software assigns the next task to the appropriate person and sends a reminder. Employees have their own work queues, and the system sends them email notices and reminders. Managers can load balance the queues from employee to employee when needed.

Automated Workflows Mean Efficiency and Visibility

Information is less likely to get lost, and processes take less time when the system keeps the work flowing smoothly. There is no need for offline calculations, re-keying information, and offline printouts and notes. All required information and business rules reside within the automated workflow.

Workflow automation software provides managers with robust reporting and tracking capabilities. Managers know who performed each step and how long it took. This enhanced transparency ensures that work is done correctly and provides visibility into individual employee performance. Pre-built business rules automate manager review and approval. Managers can delegate approval authority when needed. Business rules automatically reroute tasks if they are not completed within a specified timeframe.





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Why Automate Your
Processes?

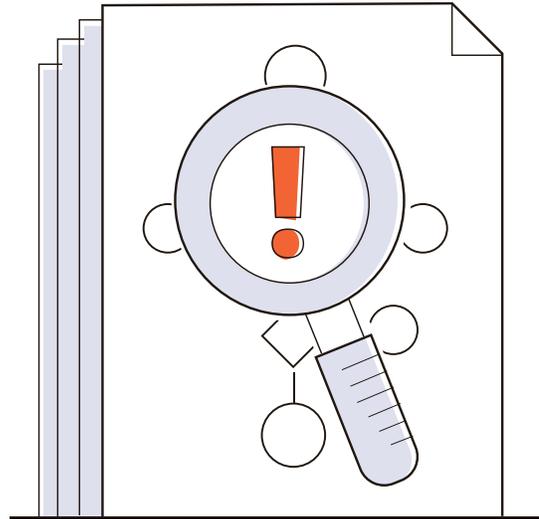
The Business Benefits of Automation

Most companies that implement workflow automation discover quickly that, in addition to solving their initial pain points, they have solved a host of additional operational issues. We'll cover the key benefits organizations experience from workflow automation.

Visibility/Accountability

Think about how much more competitive you could be if your managers could react proactively to process issues instead of after the fact. Workflow automation gives stakeholders access to see the status of every process, even those that cross several departments or silos within your organization. They can see individual task status, drill down into lagging transactions, bringing up the task notes and attached files immediately to see what is causing the delay. There is no need for the phone calls, emails, and “got a minute?” questions that are the norm with manual workflows.

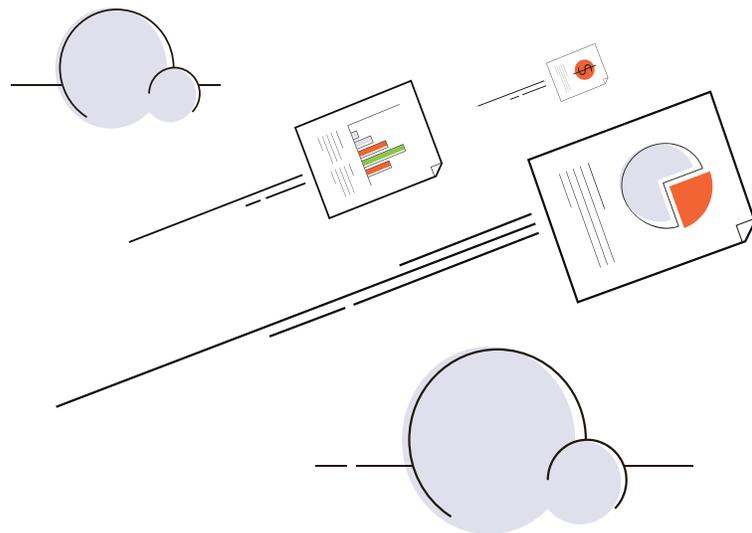
Managers can look across work queues to see where work is lagging and move transactions from one employee to another when there is a bottleneck. Employees are more accountable because the system records the time it takes to complete each step in the workflow. This tracking provides clear data for performance reviews.



Speed/Efficiency

Your organization becomes more focused because all stakeholders understand what to do and when. They no longer have to rely on memory from a training class or printed policies in a binder because the workflow automation system prompts them through each step. For instance, they cannot complete a request form until all required fields are filled in correctly.

The system provides alerts and reminders to keep the process moving. These alerts flow to both employees responsible for a task, and to a manager who oversees the process. When parameters are out of bounds, (according to business rules you set up during implementation) an escalation alert is sent to a manager who has override and approval privileges in the system. If an employee leaves or is temporarily unavailable, their tasks can be delegated automatically so that work does not fall through the cracks.



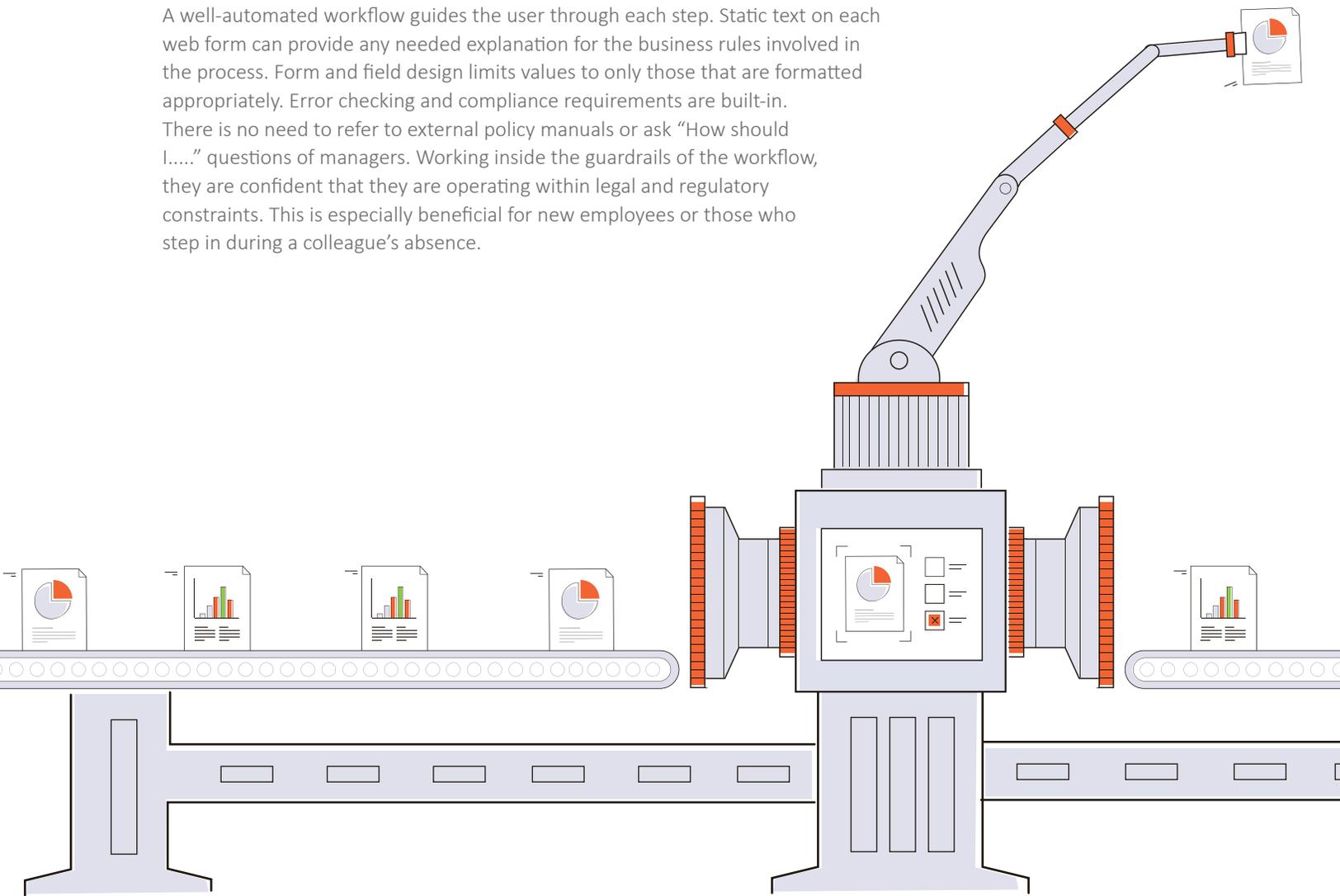
Standardization/Consistency/Compliance

When processes are not automated, there can be attempts by employees to “go rogue” and circumvent standards. This cannot happen if tasks and responsibilities are automated. The automated environment is under change control, and configuration changes require management approval. Circumvention is mitigated.

If you face regulatory compliance audits or legal action, each transaction that is completed in an automated workflow saves:

- The name of the employee who completed each step (including any approvals)
- The date and time that the action was completed
- The information entered or selected in each field on every task form
- Any attached files such as resumes, credit reports, or vendor invoices

A well-automated workflow guides the user through each step. Static text on each web form can provide any needed explanation for the business rules involved in the process. Form and field design limits values to only those that are formatted appropriately. Error checking and compliance requirements are built-in. There is no need to refer to external policy manuals or ask “How should I....” questions of managers. Working inside the guardrails of the workflow, they are confident that they are operating within legal and regulatory constraints. This is especially beneficial for new employees or those who step in during a colleague’s absence.



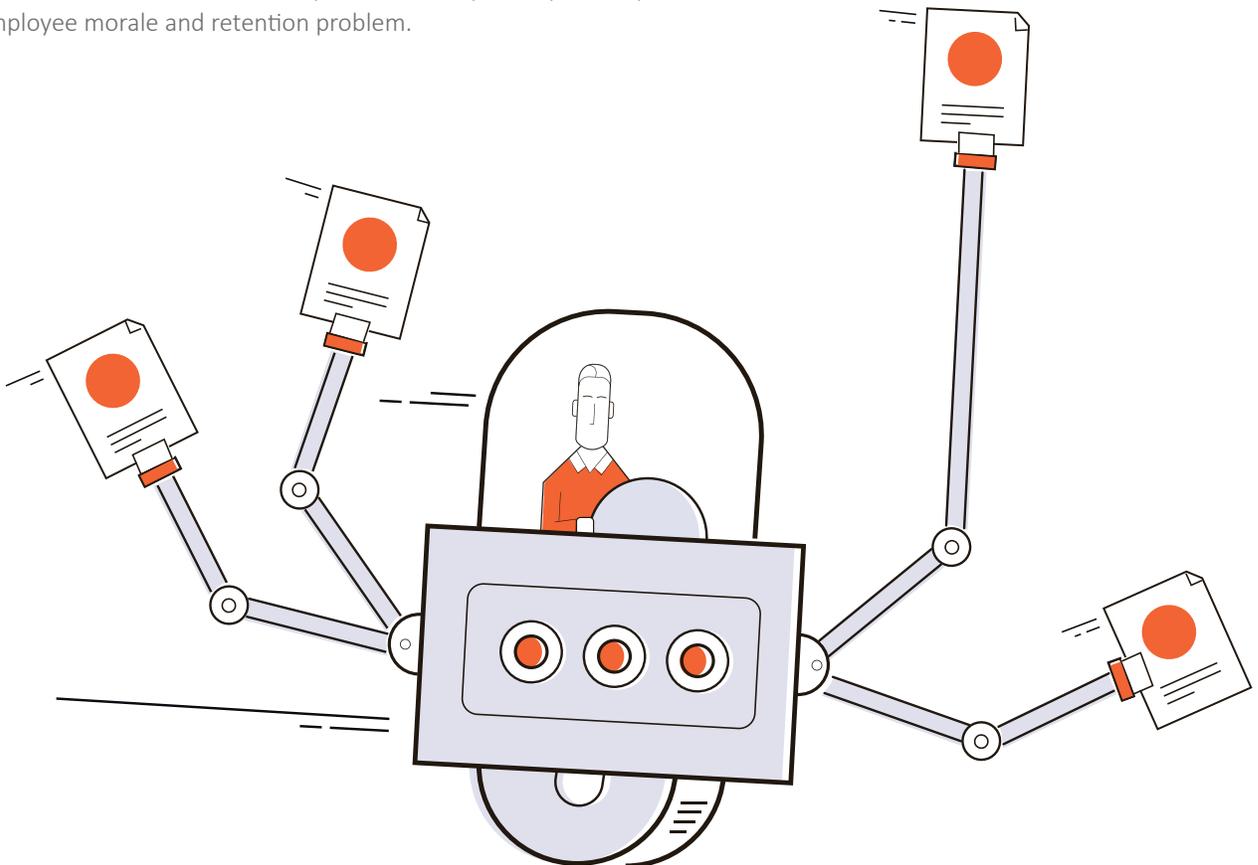
Productivity Boost

Each automated process boosts employee morale and permits them more time to focus on the real value-added work of your business. They can accomplish more with less effort and less support. You can build exception handling into your workflows so that there are fewer email discussions and lengthy deliberations about how to address them.

Consider how much more focused and happier your workforce would be if they no longer had to:

- Hunt through their inboxes to find information
- Manually move a request up the approval chain
- Call and/or email to get status updates
- Send reminders to their colleagues who fail to provide them with adequate information
- Print, maintain and read paper forms
- Type in information from a printout, offline calculation or scribbled notes

Everything in this list creates confusion, chaos, and employee apathy. If these actions are the norm in your business, you may develop an employee morale and retention problem.

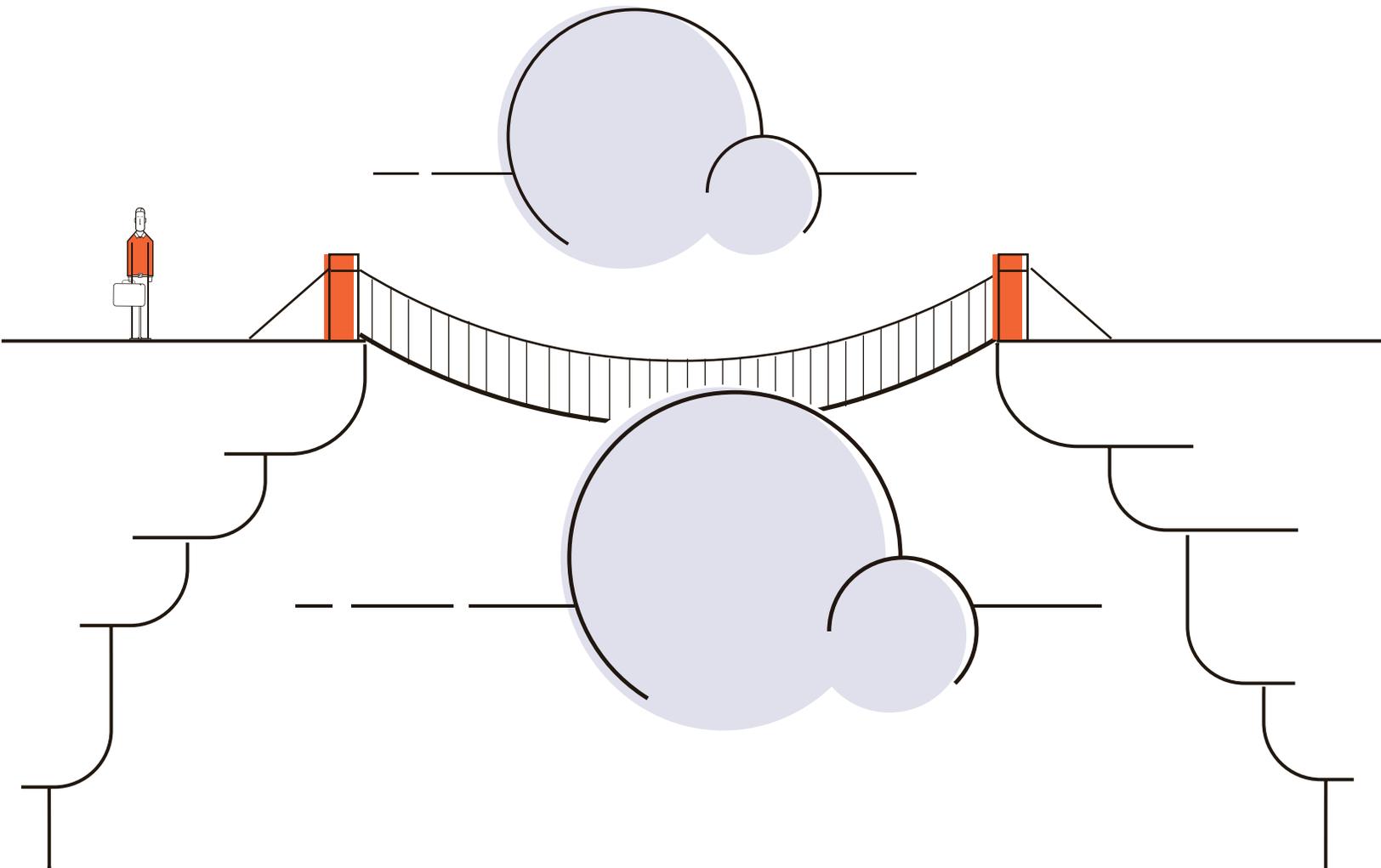


Filling Gaps in Legacy/Homegrown Systems

Many organizations struggle to integrate the financial, CRM, HRIS and other systems from different vendors, or their enterprise information architectures include homegrown systems. Most enterprise software offerings have poor workflow tools, and those tools only exist in a single silo. You don't need a new ERP or CRM system to get good workflow because every business has workflows that take place outside system boundaries.

It makes more sense for employees to complete tasks in automation software, and have the software send the required information to other enterprise systems. Workflow automation systems connect both human actions and information systems. You replace bad workflows that require employees to learn multiple systems and switch windows or browser tabs to complete a process. The transfer of information from one system to another system happens in the background, with the workflow automation system exporting and importing data.

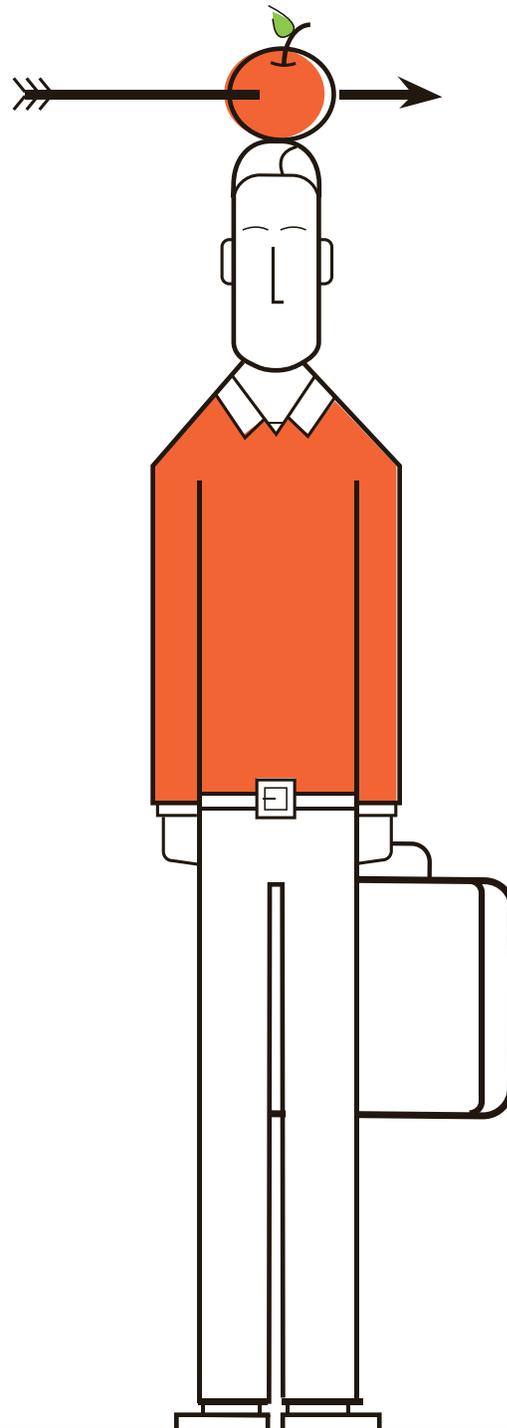
If you rely on homegrown systems for any workflow, system integration, or reporting, you face significant business risk when key IT employees leave. Is the code understandable and maintainable by more than a few individuals? Will you need to hire consultants to reverse engineer or maintain it? A key goal of your workflow automation initiative should be to replace these risky homegrown systems with software that can be easily configured.



Increased Accuracy Reduces Business Risk

Data capture forms built within workflow automation tools minimize external lookups and enforce information accuracy by limiting values in dropdowns, checkboxes, etc. and requiring fields. Smart forms allow users to select rather than key some information and prevents required fields from being left blank. The workflow decision engine routes subsequent tasks to only those individuals specified in business rules.

Administrators can build in sequential or parallel checkpoints, so that process outcomes can be accurate and standardized. Plus, thanks to the transparent nature of workflow systems, management never has to go on a fishing expedition to oversee workflow tasks because status information is available to them in real time with robust drill-down capability.



Customer Service and User Experience

Good customer service is obviously a requirement for your company's external customers, but also should be expected for the internal customers, vendors, and partners who are part of your business processes. The "customer" of a process is any individual who can place requirements, constraints, or demands on a process. For example, the payroll department director is the customer of an Employee Time and Expense Entry and Approval process. A partner's sales representative is the customer of a "Partner Lead Submission" process.

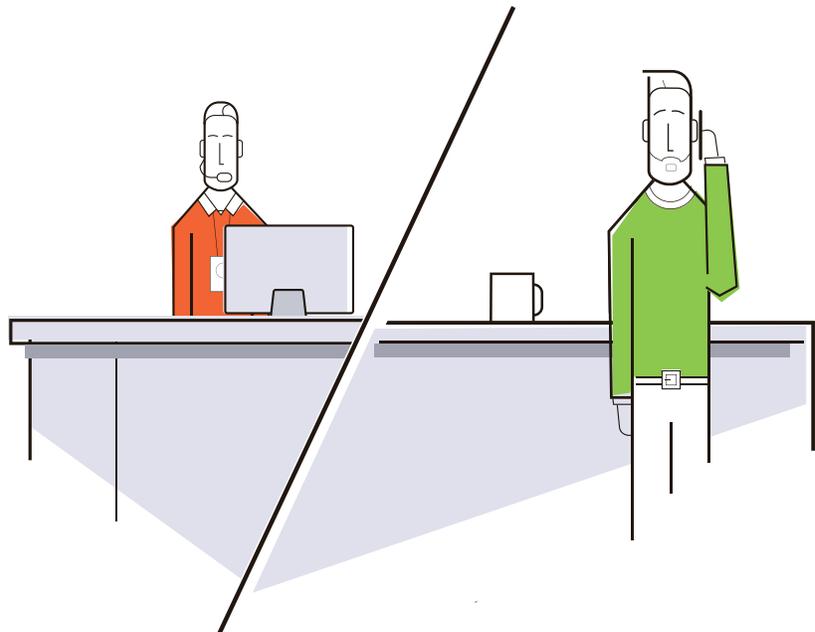
When external customers become frustrated by delays in service, mistakes in orders, long support wait times, etc. it is often the fault of poor workflow processes. In some cases the workflow includes too many manual steps.

For instance, a sales order might be delayed because a volume discount requires VP approval before being fulfilled. If this discount is handled via an email from the Sales Manager to the VP, a multitude of issues can prevent a timely response:

- ❑ The Sales Manager forgets to send the email
- ❑ The Sales Manager is on vacation.
- ❑ The email is sent to the wrong person.
- ❑ The VP is out for the week.
- ❑ The VP is travelling.
- ❑ The VP misses the email.

You get the picture. Meanwhile your customer waits, wondering where their order is and growing increasingly frustrated. Ultimately, you may lose business to competitors who have efficient automation-enabled operations.

These inefficient manual processes also create friction between departments, add to organizational chaos and inefficiency, and waste employee time. Internal customers of a process feel angry when their repeated requests for information are ignored or when they receive a sloppy, disorganized paper trail as a handoff. With automation, tasks move efficiently and accurately from one coworker to the next, regardless of department or hierarchy. Internal customers receive timely responses and don't waste time figuring out the status of tasks in the process.

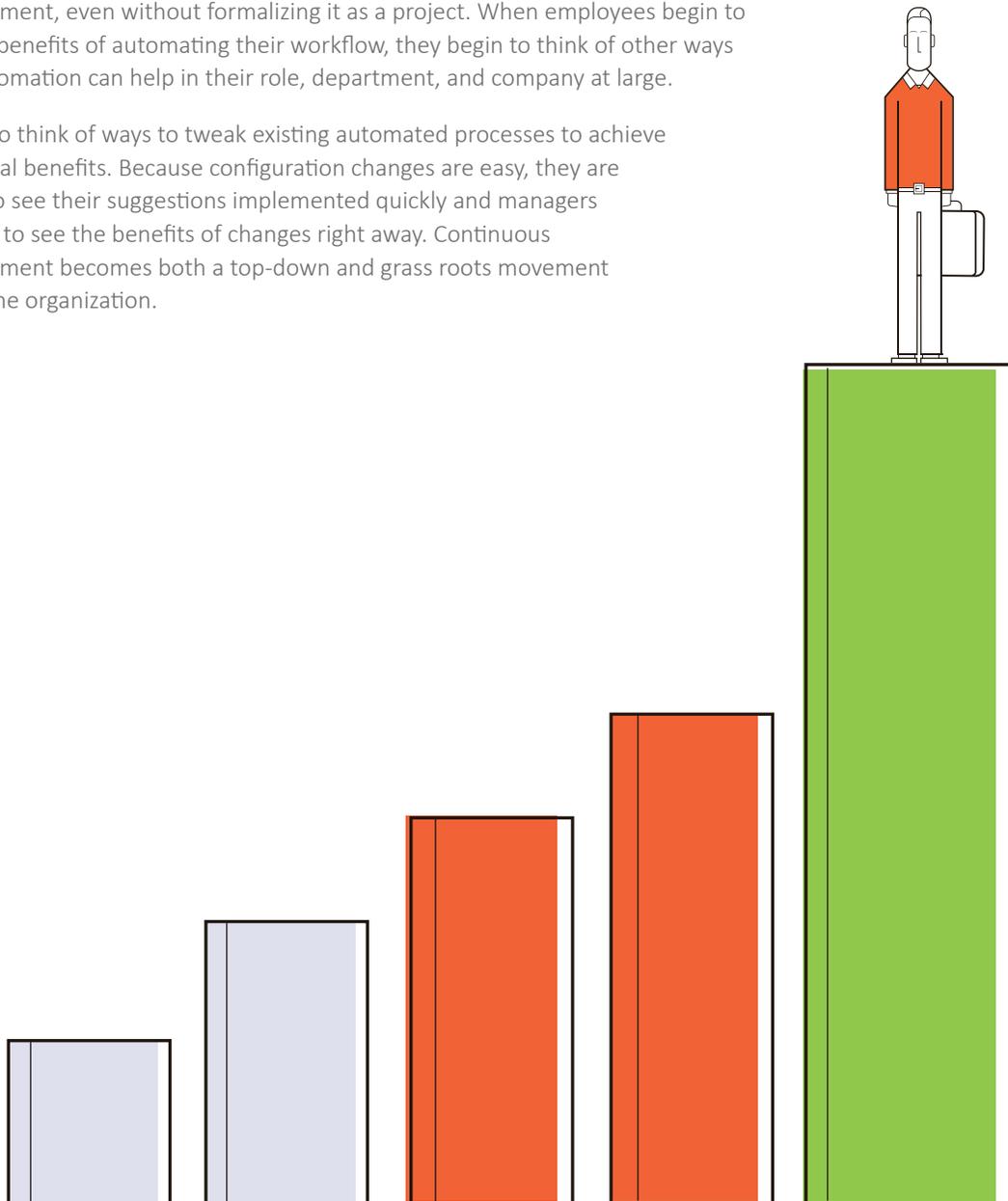


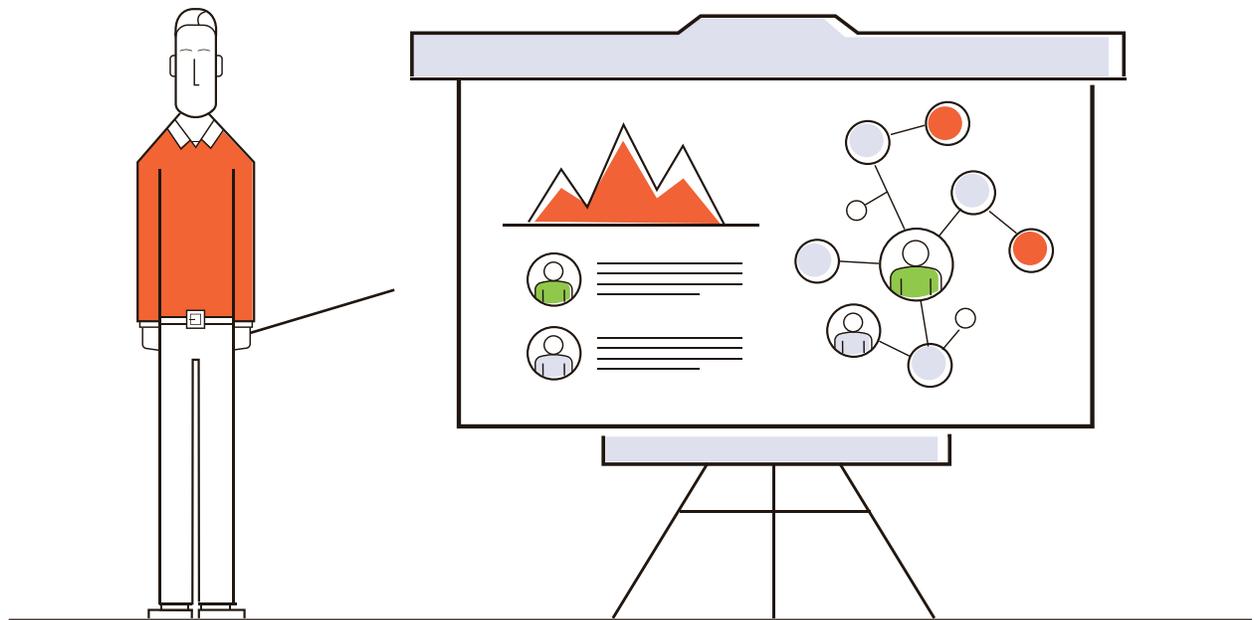
Automation Naturally Drives Continuous Improvement

High-functioning organizations maintain a commitment to continuous improvement. They are always looking for additional ways to reduce friction, promote higher customer satisfaction, maintain consistency, provide visibility, and eliminate errors. Automation is a cornerstone of the digital transformation every business needs to stay ahead of their competition.

Organizations that embrace workflow automation take naturally to continuous improvement, even without formalizing it as a project. When employees begin to see the benefits of automating their workflow, they begin to think of other ways that automation can help in their role, department, and company at large.

They also think of ways to tweak existing automated processes to achieve additional benefits. Because configuration changes are easy, they are happy to see their suggestions implemented quickly and managers are able to see the benefits of changes right away. Continuous improvement becomes both a top-down and grass roots movement within the organization.





Section
04

Selling Workflow Automation Internally

The Keys To Success

Automation may clearly make sense for your department or business unit, but upper management may need to be educated to approve the adoption of workflow automation software. Here is a suggested internal selling approach and some helpful talking points.

Step 1: Raise Awareness

Make sure those with approval authority understand the real pitfalls of manual workflows — factual statements followed by “what if?” questions plant the first seeds to prepare them for your workflow automation proposal. It’s helpful if they hear these statements coming from several departments. For example:

“We’ve lost six customers this quarter. I did follow-up calls to try to retain those accounts and got an earful about how our customer service people can’t answer a simple question about what was taking the last order so long, or what these additional invoice charges are. They promise to get call customers back, but it takes a week to get a straight answer. What if we found a way to put all that information at their fingertips while they are on the phone with an unhappy customer?”

“I found a vendor who could reduce the price of our packaging materials by six percent, but it’s been three weeks, and AP hasn’t set them up in the system so I can’t order yet. What if there was a way to shorten the new vendor setup process?”

Step 2: The Internal Proposal

Now you can follow up with a more formal presentation to management. Management will be receptive to the thought that one workflow solution can benefit many departments. Here is an outline for your management talking points. Edit this list and fill it in with concrete examples of the errors and inefficiencies your business is experiencing with manual processes.

- We are Losing too Many Opportunities
- We are losing customers and orders because....
- Employee turnover is too high
- It’s taking us too long to...
- We may have a compliance issue with...
- We don’t have time to keep up with increased business because...

We have identified a single solution that can quickly address all these problems and:

- Provide better real-time visibility into our business
- Hold employees more accountable for their work
- Speed up transactions and make departments more efficient
- Reduce errors and improve consistency and compliance
- Allow our employees to do more with less
- Free up critical employees for higher value tasks
- Fill the gaps in our IT architecture

We propose the adoption of workflow automation software and would like to bring in a vendor to show you a demo of how the system works. They can explain the costs, the implementation timeline, and tell us how much staff time they will need to help design and configure the system.

Step 3: Clearing the ROI Hurdle

After the presentation, management should be happy to hear more about workflow automation. If they require a formal return on investment analysis, you have some additional work to do. We can help you with preliminary estimates for the investment part of the equation but every situation is unique to the organization. Here are some tips for developing the numbers for the costs of not implementing automation.

- Work with your colleagues in other departments to attach estimates to your manual workflow inefficiencies.
- If you have lost customers, how much revenue did they create in the prior twelve months?
- If any vendor or customer agreements were executed with errors that are not in your favor, what is the total annual cost?
- If you have had to hire temps or pay overtime to handle work backlog, what did you spend?
- Capture any legal fees and regulatory fines arising from errors or product defects
- If you have employee turnover because of frustration with organizational inefficiency, estimate recruiting and onboarding costs and add in at least one month's fully burdened salary for each marginally productive new employee.
- What IT costs (internal and external) will you avoid when workflow automation software replaces homegrown integration and point automation coding? Include hardware, staffing and external hosting/consulting costs

These numbers, when consolidated across departments should be enough to offset the investment in workflow automation. If management still has questions, feel free to reach out to our sales team for some additional help in addressing their unique concerns.

One final note

Do not give up if management is still not convinced. Keep gathering more information and continue to quantify the hidden costs of manual workflow inefficiency and bring the issue up again every quarter.

