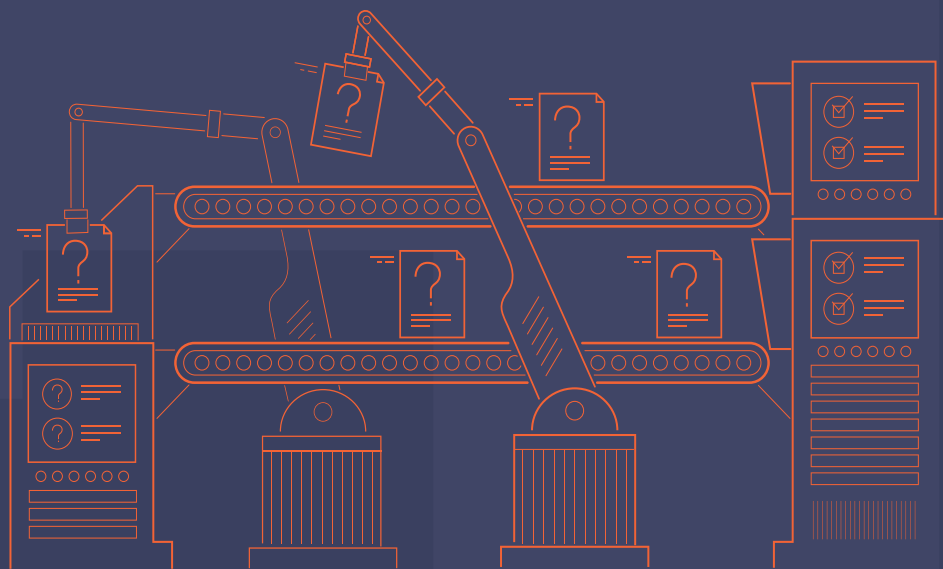




Approval Workflow Reimagined

Learn about why approval processes are essential for the enterprise.

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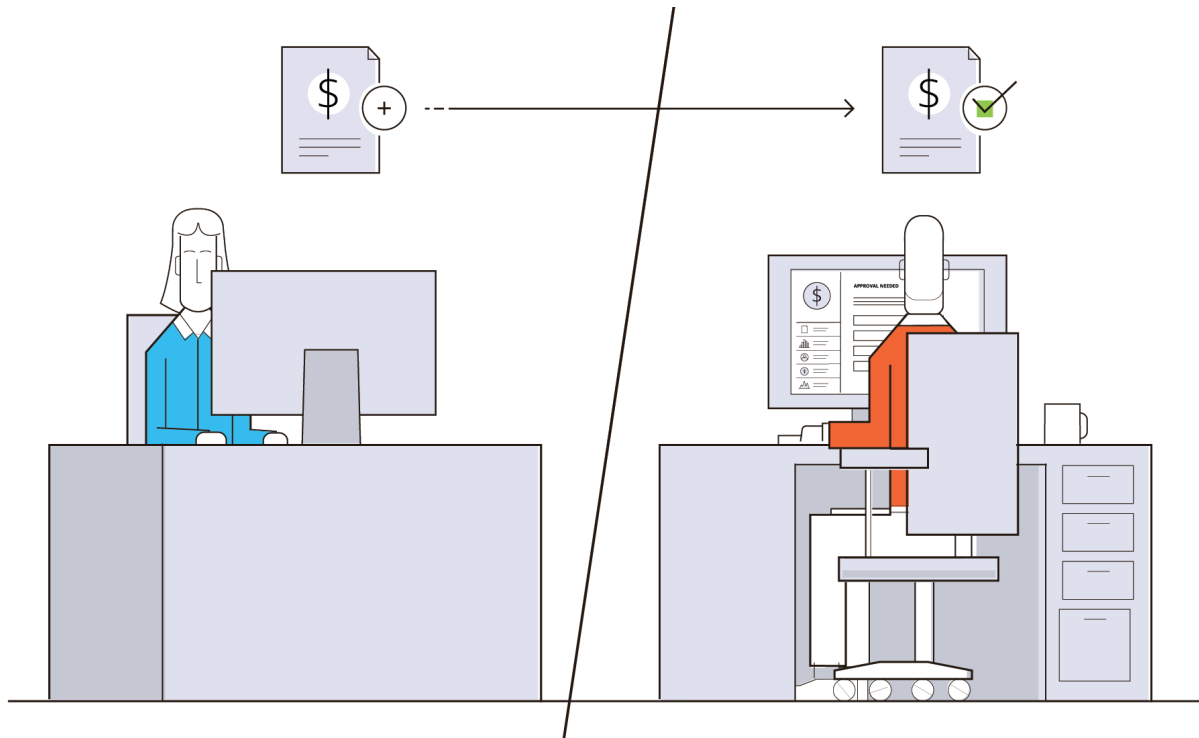


Section 01

Introduction

For enterprise organizations, outdated approval processes can slow operations and derail growth. Lags, lack of transparency, and antiquated systems can frustrate users, approvers, and leadership. Fortunately, automation technologies are reimagining the approval roadmap, creating seamless, intuitive, and efficient processes that can transform these core functions. With the right technologies, enterprises can rethink their approval workflow, from forms and routing to sign-offs and reminders.

Below, learn about why approval processes are essential for the enterprise, the challenges facing enterprise approval processes, examples of standard approval processes, and how automation can revolutionize your approvals.



Section 02 Approval Processes in Larger Organizations Are Different

Approvals are integral to the operations of any enterprise organization. Decisions and tasks require sign-off to ensure compliance with organizational rules and regulatory mandates.

Managers want to know what employees are doing, from placing orders to requesting time off. Division and group leaders must sign off on requests to fill vacant or newly approved jobs, and HR, finance, and legal departments must consider and approve or reject requests daily.



Section 03 Why Better Approval Processes Are Critical in the Enterprise

Enterprise businesses are complex, with larger workforces and more approval layers than small- and medium-sized companies. With approvals, the stakes are higher. More resources are at play, more capital is involved in the seemingly simple requests, and more people are affected by the decisions.

That makes business processes, like approvals, even more essential to get right. They are the lifeblood of the enterprise.

“Like blood vessels, they fill it with life and determine its way and speed of value creation as well as the cost to serve its customer base,” writes Michael Rosemann, professor of innovation systems at Queensland University of Technology, in the forward to the book [Business Process Change](#). “Thus processes reflect organizational productivity, effectiveness, and efficiency, but also its reliability, complexity, and ultimately its culture.”



Section 04 Reluctance to Innovate in Process Management

A recent Harvard Business Review article discusses [the problems plaguing most process management efforts](#). Too often, the authors note, process management is considered a “back-burner issue,” with businesses delaying or not prioritizing the work to engineer or reengineer processes that are not working.

There are two main problems with the current approach.

The first is that, too often, the approach to process management moves too quickly away from the current state or how a process like approvals is handled today. Business process management focuses on getting to the “to be” without spending enough time on the “as is” or the current way processes flow.

“Understanding the current process is critical to knowing whether it is worth investing in improvements, where performance problems exist, and how much variation there is in the process across the organization,” the authors write. “As a result, some companies either skip current process analysis altogether, adopt shortcuts to it, or pay consultants a lot of money to analyze the ‘as is’ process.”

The second challenge concerns the inevitable interrelationships between processes and business technology systems. Many enterprise systems are black boxes that support and execute the processes built into them well. However, the authors note that “there is rarely an easy way to understand how the process is being executed from the information system.”

This lack of transparency makes it challenging for organizations to grasp how approvals and other core processes operate daily fully. Other process design tools are needed to determine the steps and gather and use data related to those processes. This lack of transparency causes some enterprise organizations to put off process management that can transform processes that are not working well.

Section 05

Why Better Approval Processes Matter to the Enterprise

Evolving processes yield better business results, and the results can be profound in an enterprise-sized organization. Here are three core needs that can be addressed with approval process improvements.

Efficiency and Speed

An enterprise needs every competitive advantage to stay ahead of its rivals. Yet, agile improvement can often be hampered by complex management layers and constituencies, including boards and shareholders.

Competitive market forces often demand swift action, and approvals are required to execute new initiatives. Having seamless, transparent, and clear approval processes allows the enterprise to be responsive to all these demands and act swiftly and decisively.

Employee Experience

Today's employees want Amazon-like experiences with the technology used in the workplace. They don't want to waste time at work with antiquated systems and paper forms that can slow them down. Instead, they'd rather spend their work hours on meaningful and productive work that connects them to customers and shared business outcomes.

The employee experience is critical for companies looking to attract and retain the best talent. That can't happen with systems that are outdated and don't work well. If so, they are likely to leave quickly for companies with better internal processes and systems supporting employees.

Regulatory/Compliance Focus

Regulatory compliance is increasingly complex. Enterprise companies are subject to more regulations from more entities. Mandates require clear, consistent, and on-time reporting on financial processes, data usage, and security.

Regulatory compliance is an enveloping issue for enterprises, touching on every operational area, including finance, HR, and product or service areas.

Failure to comply with regulatory guidance can result in costly fines and financial penalties. There's also the risk of reputational damage if the failures put employee or customer information at risk..

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Section 06

Current State of Approvals and Challenges for Companies

The importance of efficient approval processes is evident. Yet, they are plagued today by persistent problems that automation and process improvement can prevent.

Enterprises face many common challenges with their approval processes, including the following.

Long Approval Cycles

Approval cycles can be long, with multiple busy approvers who may not prioritize approval requests. The cycle can be shortened by carefully considering how many layers of approval are necessary and creating automated reminders to ping approvers about imminent deadlines and overdue actions.

Lack of Transparency and Auditability

Employees, managers, and department leaders need to know where things stand with approval requests. Not knowing where a request is in the pipeline can lead to frustration and confusion. With paper forms, there's also more risk of delays with forms in internal mail, sitting on an approver's desk, or in an inbox.

Auditability, given the regulatory mandates at play, is also critical. However, tracking approvals, storing documentation, and retrieving information necessary for regulatory reporting can prove difficult without centralized systems and standardized reporting.

Disconnected, Manual Systems

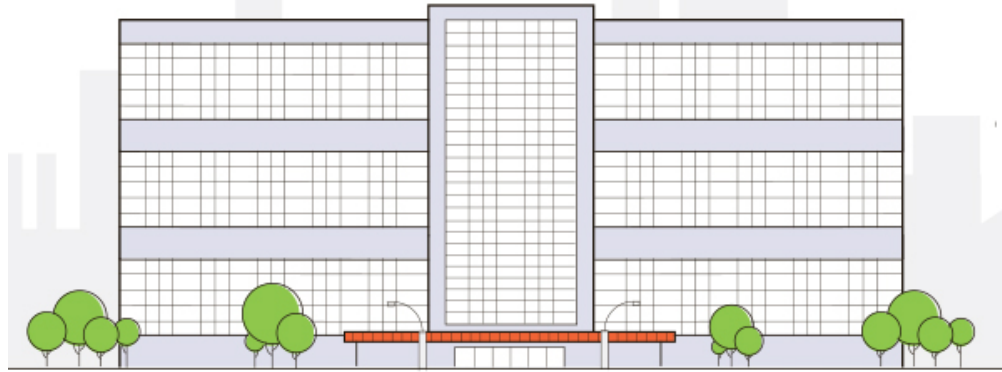
Approvals are rarely independent decisions. They have an impact on multiple departments and business operations. These interrelationships are compounded in a complex enterprise company.

However, poor approval processes can delay getting information into the business systems necessary to move projects, purchases, or people along a workflow. Systems that are not integrated and automated introduce more risk of data entry errors and delays that can stall projects. Again, a lack of transparency plays here, with one department unaware of where an approval is, leading to ripple effects throughout the organization.

Confusing Procedures

Approvals should be clear and consistent, with well-planned procedures and documentation that reflects company policy. A lack of definition potentially introduces chaos into operations, with users and approvers unclear how to complete forms or approve or reject requests.

A critical step in business process management involves defining, documenting, and reviewing procedures for each step. Understanding the details and how users navigate the forms and systems is essential. It allows for changes where procedures are not working or leading to unnecessary errors.



Section 07

Examples of Approval Processes in the Enterprise Company

Not all approval requests are the same. Enterprises use many different types of requests, each with its own approval processes and needs. Here are four of the most common.

Capital Expenditure Requests

[Capital expenditure requests](#) seek approval to spend on a capital asset, such as equipment, a new technology, or a building. The request will typically include a description of the capital item, its need, projected costs, ROI, and expected lifecycle.

AP Processes

[Accounts payable processes](#) are used to submit invoices for payment to vendors. Invoices are often matched against a previously issued purchase order and sent to managers and finance staff to generate the payment.

Employee Onboarding

[Employee onboarding](#) includes multiple steps, some of which a new worker completes themselves and others which require a manager or other staff member to be involved. Onboarding steps include providing documentation for work status, reviewing and accepting policy adherence, enrolling in benefits, meeting with key staff, accepting equipment, and completing training. Often, these steps, once completed, must be approved by managers and HR staff.

Product Development

[Developing new products](#) often requires multiple steps to be reviewed and approved before moving on to new phases. Design schema, development costs, usage results, testing, regulatory approval, intellectual property submissions, and marketing plans must be completed before a product launches.



Section 08

Best Practices for Approval Requests

Different organizations use different tools to manage their approval requests. The two most common are a centralized portal tool and paper request forms.

Centralized Portal

A centralized portal provides enterprises with a unified, cloud-based solution that authorized users can deploy to make and approve requests, check the status of approvals, and run reports about approvals. It's the best approach for large organizations with complex approval processes and multiple users, approvers, and process types.

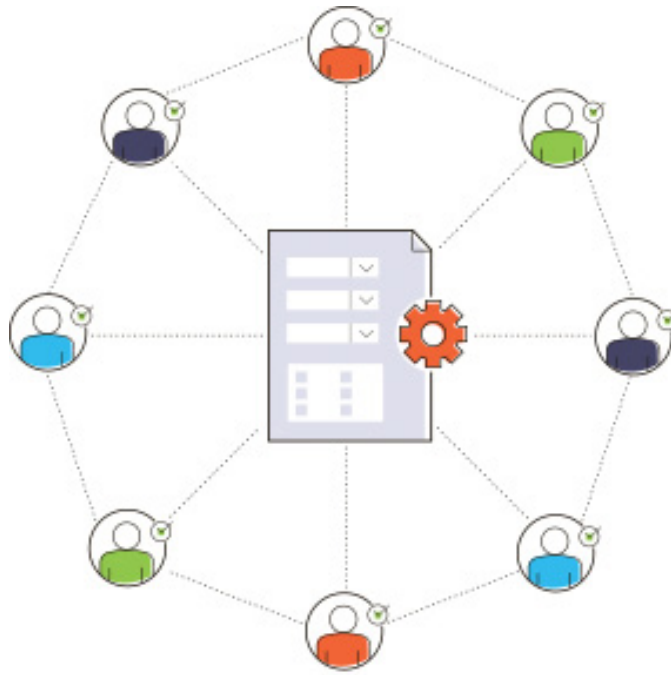
Request Forms

Request forms are a standard part of the approval process, whether using a centralized portal or paper process. Request forms should include only fields necessary for approving or rejecting and pre-filled information whenever possible.

Web-based request forms are best when conditional logic is used, routing the submitter from section to section depending on responses. It's best to avoid free-form fields whenever possible and consider how the forms display on mobile devices to ensure users can use the system on all device types.

Ensuring Transparency

When creating an approval process, transparency is essential. Employees and managers should expect to understand how the processes work, what steps are involved, and how they will be notified of progress. Users are liable to be misinformed about the process and progress without transparency.



Section 09

Providing Approvals

When considering a new or revised approval process, it's important to factor in various elements and ensure you've addressed all the enterprise's needs. Doing so will ensure the process is thorough and that you achieve buy-in.

Who Are Your Stakeholders?

At the start, consider the stakeholders who need to be involved in each process phase. The stakeholders needing approval may vary based on the request type, the information on the request form, and any previous approvals. Also, consider which tangential stakeholders may need to be informed, even if it's a simple FYI notification.

Review Options

Determine what options reviewers will have when considering a request. The steps need not be extensive or overly complex if they are well-defined and create appropriate notifications, alerts, or reporting. The most common options are approve, deny, send back, and re-route.

Approval Task Management

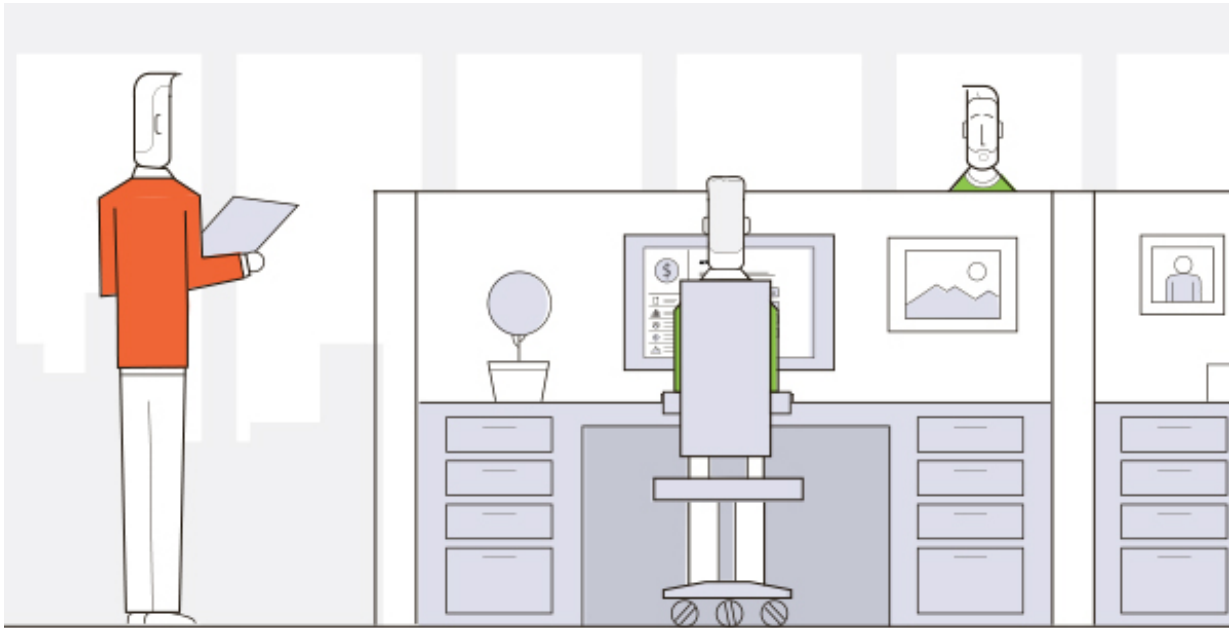
At the heart of the approval process is the development of tasks that will define each move. Each task will move a request through the workflow until it's completed. Each task, once finished, will spur a subsequent action task, which may come with a notification. Defining these tasks and how they fit into the workflow is critical to process management.

Notifications, Reminders, and Escalations

An effective approval process includes an array of notifications and reminders, which can be activated based on the completion of a task, a lack of action, or other activity related to the request. In some cases, such as with a lack of response to an approval, escalations to more senior leaders can also be built into the workflow.

Backup Approvers and Delegations

Too many approvals stall because someone is out of the office for travel, illness, or vacation. That's why backup approvers and delegates, who can act on behalf of the primary approver, are an essential component. Approvers can set and authorize these backups and delegates, ensuring that requests move along when there is an absence.



Section 10

Approval Workflow

Developing the workflow requires carefully considering the existing process, determination of what's working, and a desired "to be" state. When determining which solution to use, look for technologies incorporating the following into the decision-making process.

Sequencing Review and Approval Steps

Consider the sequencing of your approvals and who needs to approve what and when. Your approval sequence may vary based on different request types, review options, and if additional forms are necessary at different stages.

Many variables can affect the approval process, including the project type, region, department or division, dollar amount, or project changes.

Approval Matrices

Creating an approval matrix can help change management should personnel move on to new roles or leave the organization. The approval matrix shows the business rules for routing approvals through a business process. It ensures that people make decisions at the right points in the process.

If someone is no longer in a role, you can look at the approval matrix to ensure approvals continue with new individuals in place.

Business Rules and Logic

Creating business rules and logic ensures that each task has a sensible sequence, depending on the decision made. These rules ensure that no matter what the outcome at a stage of the approval process, there is a defined route taken.

Integrations

To reduce errors and accelerate operations, a solution must seamlessly integrate with related business systems. Depending on the approval type, notifications, data, and actions may be necessary in other parts of the technology stack, especially finance, HR, and unit business systems.

Communications

Communication is a critical part of the approval workflow. These communications should occur at key points in the workflow, primarily when approvers act on a request. If applicable, communication may include notifications to the submitter, manager, other approvers, and other departments.

Section 11

Case Studies

Integrify is a powerful solution for approval processes, providing enterprise companies with a comprehensive platform. With Integrify, companies can build processes, forms, and reports, integrate with other business systems, and present users with an intuitive, easy-to-use web-based portal.

Two cases show how Integrify has helped enterprise businesses solve complex approval problems.

Case Study #1: BP Energizes Finance Approvals

[BP](#) is one of the world's largest energy companies, and its U.S. Convenience Retail group needed a standardized method for processing financial requests, better tracking, and a way to report on requests that complied with the Sarbanes-Oxley Act.

Paper finance memos were not standardized, and storing, tracking, and locating them was problematic, especially when many did not have the proper approvals. It was essential to get the right approvals for capital spending and storing them in one location.

BP Needs

Specifically, the BP unit was looking to:

Build an automated system to replace paper finance memos, creating an audit trail for financial requests and saving time

- Integrate a new system with its SAP solution while not duplicating functionality
- Track and archive data for Sarbanes-Oxley compliance
- Implement an affordable system given the need had not been in the group's budget

The Integrify Solution

The group identified Integrify as the solution provider best matched for what BP needed. Leaders recognized that Integrify's automated process tools were affordable and straightforward to integrate without overlapping with other technologies.

Leaders also liked Integrify's built-in capabilities that provide reporting and analytics that ease Sarbanes-Oxley compliance.

With Integrify in place, 150 employees in multiple locations in the Asset Management department of the Convenience Retail group are system users. They use Integrify to obtain the correct approvals for capital spending in the United States and to track the several hundred active projects at any time.

BP uses the Integrify system for multiple requests, including divestment memos, site floor plan changes, and Integrify's raise-and-rebuild allocations.

With Integrify, BP can launch, monitor, and control processes and policies that need authorizations. This control is part of the internal compliance mandates in Sarbanes-Oxley.

Employees can now build, describe, and publish corporate policies, automate enforcement of internal controls, develop a complete audit trail of control activity, and document and automate risk assessments. These tasks reduce the time and cost of affirming how compliant internal controls are on financial reporting.

BP staff can create reports to monitor processes, moving approvals and projects along faster than possible. The company has seen significant ROI due to Integrify's simplicity, allowing the group to process and track requests in real-time.

Case Study #2: ERC Engineers HR Solution with Integrify

[ERC](#) is a research-and-development company in the military and space industries, providing test and evaluation, operations, maintenance, IT, software, and network administration services. Customers include NASA and the U.S. Department of Defense.

The company needed to advance its HR operations beyond emailing PDFs and Word documents for review and approval. The existing workflow solution did not let staff track progress, fix bottlenecks, or integrate the technology with its enterprise resource planning (ERP) solution.

Employees were using different, often outdated forms that were frequently filled out incorrectly or missing information. The inconsistencies, errors, and lack of visibility slowed approvals and meant extensive rework.

ERC Needs

- ERC needed a solution that provided the following:
- Custom, rules-based workflows that used data entered on online forms
- User-friendly options like search boxes and selectors on dynamic forms that were tied to the company's accounting system information
- Pre-populated, employee-specific information to enhance data accuracy
- Compliance with the company's rigorous security requirements

ERC was drawn to Integrify due to its ability to create custom workflows that reduced rework and integrated with its ERP system.

The Integrify Solution

Integrify used its low-code process application system to quickly create forms and processes, starting with ERC's most commonly used internal processes and validating the builds. Integrify was able to streamline multiple paper-based and inefficient processes with customized approval rules.

ERC's HR operation is now increasingly paperless, with Integrify used to transform multiple processes, including:

- Job offer datasheets
- Personnel change notices
- Employee terminations
- Healthcare open enrollment
- College tuition reimbursement
- Discipline and warnings
- Personnel change notices
- Telework agreements
- Tuition assistance
- Vacation buyback

Other core processes now use Integrify, including:

- Conference room bookings
- Employee outreach
- Foreign travel
- IT support requests
- Military installation visit requests
- Security submissions
- Subcontractor management
- System access requests

Employees have found the new system easy to use, and managers report workflows are more efficient. HR and Finance departments report fewer errors and less time processing and rework.

The company also praised the accessibility of historical data, which helps review past employee transactions while processing current transactions.

Having already used Integrify for HR, IT, and security processes, ERC is now looking at other areas for automation, including more complex processes that are highly integrated into their enterprise technology stack.



Section 12

Technology Considerations

There are several layers of technology needs you must address to support an effective process improvement initiative.

Build Your Own

Building internally is always one possible option for companies with sophisticated IT organizations, and sometimes it is the best choice, depending on the use case. Organizations wisely perform the necessary due diligence of determining if existing resources can be leveraged and if a homegrown solution will meet the needs of the business.

A significant factor that significantly reduces the ROI of a custom solution (and, in many cases, ultimately causes the endeavor to fail) is the lack of available personnel with proper skill sets. It takes many skills to design and deploy a business solution that is both scalable and extensible. Likely, your technology resources do not include all the skill sets necessary for launching, maintaining, scaling, and improving a successful software solution. For more on the topic, visit [“The Temptation and the Trap of Homegrown Systems.”](#)

Repurpose an Existing Technology

Given the expansiveness of some tech stacks, it's possible you may already have a tool in place that can handle requests and approvals. It could be a feature built into a CRM or ERP system or department specific software solutions like Accounting or an HRIS system.

While these solutions may offer only limited approval functionality, they should be considered and tested for adaptability before considering buying a solution.

Invest in Approval Software

For organizations with more complex, custom approval processes, it makes sense to investigate investing in approval management software. It's designed to handle myriad request and approval scenarios across any industry or department.

Consider the following criteria when selecting a tool:

- Ease and speed of implementation as well as scalability for complex processes.
- Shortest possible learning curve for administrators and end users.
- IT resource needs for implementing and supporting the tool, like integration, on-premise installation, and additional coding if desired.
- Easy visual tools for process diagramming, with the ability to capture appropriate data along with the objects in the flow chart or diagram.
- Built-in process for designing, editing, approving, and publishing new processes or workflows.
- Inherent workflow automation (routing and alerts, ability to capture the required complexity of your business rules).
- Smart data capture/forms capabilities and customization.
- Ease of data integration into other enterprise applications (an open API).
- KPI tracking and reporting that provides easy-to-understand charts along with direct access to the underlying data for further analysis.



Section

13

Conclusion

Approval processes in enterprise businesses are critical and the challenges of managing approvals efficiently and transparently can be a strain on operations.

The benefits of better approval processes, such as increased efficiency, improved employee experience, and compliance with regulations are clear.

Approval management software like Integrify provides a comprehensive platform for building processes, forms, and reports, integrating with other business systems, and presenting users with an intuitive web-based portal.

Key points

- Approval processes are crucial in enterprise businesses and require consistent and transparent management.
- Better approval processes lead to increased efficiency, improved employee experience, reduced errors, and compliance with regulations.
- Approvals can be automated by sequencing review and approval steps, creating approval matrices, scheduling alerts and reminders, and establishing business rules and logic.
- When choosing an approval management solution, easy implementation, scalability, and customizability are critical.

About Integrify



Our Story

Integrify has been a leader in request and approval workflow management for over twenty years. Launched in 2001, with headquarters in Chicago, we've built a reputation for creating software with the customer in mind.

Users value simplicity and integration. That has always been the focus of our product. Rapid distribution, broad scalability, and high ROI are goals that we are constantly reaching, only to set the bar again even higher.

Our Mission

Our job is to ensure customer success by helping them do more efficiently. We are constantly innovating to provide compelling, simple, and adaptable solutions. We believe we can work with customers to build solutions to buck the status quo and make organizations more productive.

Interested in Automating Your Workflow?

We have a variety of resources to help you on your journey to an automated workflow.

- [Request a Demo](#)
- [Workflow Tools and other eBooks](#)
- [Recorded Demos of our Workflow Automation Software](#)
- [2-Minute Quick Demo](#)
- [Why Choose Integrify](#)
- [Building an Automated Process in Under 5 Minutes](#)

Integrify customers have automated a wide variety of simple and complex workflows. See the next page for a list of processes that Integrify has helped our customers automate. You can also [download our Use Case sheet from our website](#).

Use Case Examples

IT/IS

[IT Service Requests](#)

[Security Access Requests](#)

New Account Setup

[Change Requests](#)

[New Project Requests](#)

[Security Incidents](#)

Finance

[CapEx/AFE Requests](#)

Expense Approvals

Salary/Wage Changes

[AP Automation](#)

[Grant Management](#)

Marketing

Campaign Approvals

[Collateral Approvals](#)

Brand Management

Facilities

Office Relocations

Resource Scheduling

Facility Access

Move Requests

Sales

Quote Approvals

Pricing Discounts

Proposal Approvals

Product Discounts

Legal

Legal Holds

[Contract Reviews](#)

[Client Intake](#)

HR

Benefits Changes

[Timesheet Approvals](#)

[New Hire Management](#)

[Employee Onboarding](#)

[Employee Offboarding](#)

Vacation Requests

Purchasing

[Procurement Process](#)

[Capital Approvals](#)

[Vendor Management](#)

[Invoice Approvals](#)

Product Pricing

Operations

[Complaint Management](#)

Maintenance Request

New Product Request

