

Automation for Company Processes 101

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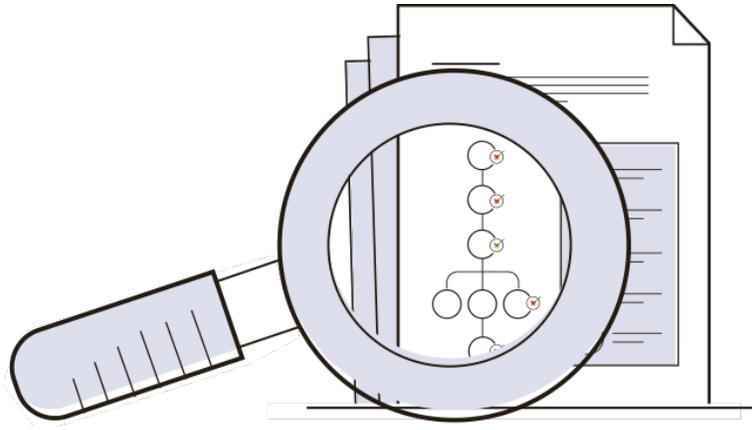
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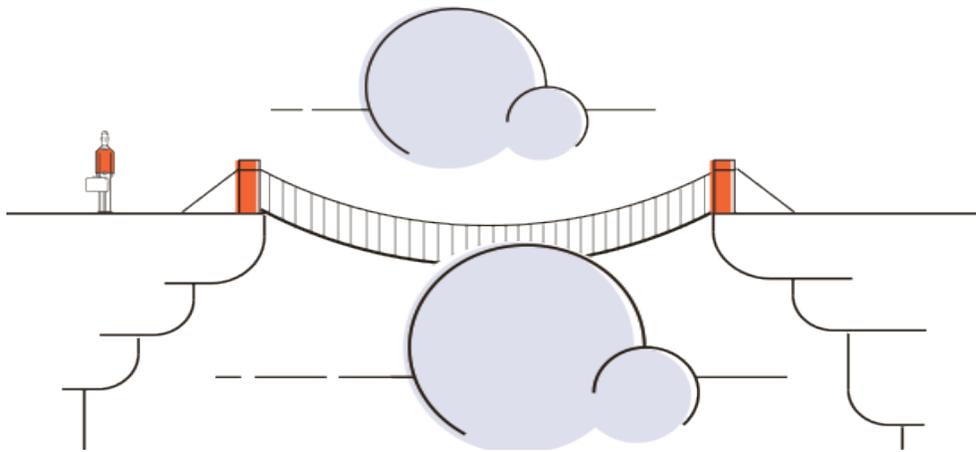
The Situation

Did you know that many companies lose 20-30% of their revenue annually due to inefficiency? According to [research done by IDC](#), there's one common factor these companies share: they still need to adopt workflow automation.

Workflow Automation refers to the design, execution, and automation of processes based on workflow rules where human tasks, data, or files are routed between people or systems based on pre-defined business rules.

Even though the benefits of using an automation platform are numerous, the percentage of companies that have fully automated at least one function was only [31% in 2020](#). What does this mean? The more processes your company automates, the more advanced that automation is, and the more likely your company is to come out on top, get ahead of, and outperform the competition.

The eBook will cover the benefits of implementing automation for your company's processes, information about process improvement and process automation, and steps to take when you realize it's time to implement workflow automation at your organization.



Section 02

Why Process Automation is Critical

Employees are dispersed

With many workers no longer in their physical workplace, supervisors face the pitfall of managing widely distributed teams. A survey conducted by [Upwork](#) predicts that 36.2 million workers, or 22% of Americans, will be working remotely by 2025. Employees aren't all in the office together anymore; remote work is here to stay, and you must ensure your organization is set up for success for your in-office and remote employees.

Web-based tools bring ease and efficiency to employees working from home. Software for remote working can incorporate communication and networking applications, for example, video chat or instant messaging software, cloud storage, project management tools, workflow automation, remote team management, etc. Dispersed employees can be more productive with the right software wherever they work.

I. Old manual processes don't work remotely

It is no longer as easy as walking over to someone's desk to ask questions, receive feedback, and communicate assignments through email. Chat is only sometimes productive or time-efficient. Web-based tools make setting tasks easy, handling employee monitoring from a distance, and ensuring your team hits milestones and completes critical projects.

II. Emails, video meetings, and messaging are inefficient

The most well-known remote work tools center on communication, for instance, video conferencing, chat, and task management. While these tools are helpful for employees in many aspects of their day-to-day, it's not the most efficient tool.

Email, while still common, is still a bottleneck for most workers. Video meetings are still meetings, which can be inefficient and unnecessary. Messaging has improved but tends to be disruptive and ineffective when it's used for workflow.

Tools that focus on "the plumbing" of workflow can maintain efficiency by their very nature. These tools include workflow automation, employee portals, and task management tools. All these technologies can provide security and connectedness.

III. Training remotely is more difficult

While learning management systems and onboarding tools are helpful for getting new employees and employees changing roles up to speed, the best way to ensure people follow the correct processes and procedures is to standardize them with workflow automation.

In this scenario, employees are pulled through the correct process automatically. Alerts, reminders, and escalations are built on business rules and run behind the scenes to ensure steps are taken in the correct order and the right people are involved at the right time. It also ensures that data collection is accurate and re-entry into existing systems is replaced with integration.

Competition is increasing

I. The number of new businesses being created each year has been increasing

On average, there are [4.4 million businesses](#) that are started every year. The US Census Bureau data shows that 5,044,748 new companies were formed in 2022. Being flexible is paramount in the world we live in now, and handling changes on the fly is becoming the norm, especially to stay up with new trends from new competitors.

II. Competitors have been adopting new digital tools

These new businesses are starting fresh, and if they did their research right, they have learned from their competitor's mistakes. Newer companies have a clean slate to start strong and embrace digital tools from the beginning.

III. Newer companies were built digital-first; old companies need to adapt

That said, since newer companies are being built in such a time where everything is digital, they may be one step ahead. But – older companies need to take the leap of faith and implement business management software to get them on the same level as the digital-first newcomers.

Business management software can differentiate between running a profitable, stable business and chaos. By automating as much of your business or department as possible with software, you can get more done with fewer resources, stay competitive, and keep more customers.

Security is at the forefront

I. Insecurity of emailing attachments

Email attachment is typically the go-to way of sharing files. Attaching forms like expense reports, vacation requests, or project authorizations created in Excel or Word to emails is inefficient and old school.

Everyone involved has to open the attachment, review the contents, fumble through the form to make any changes or edits, re-attach it and then send it out to the next person. Other than this causing huge bottlenecks, it means these documents aren't secure at all. Having forms and data passed via email is extremely dangerous as nothing is securely locked down, and sensitive information could be available to anyone who gets it.

II. Phishing attacks are increasing

According to APWG's [Phishing Activity Trends Report for Q3 2022](#), phishing attacks hit an all-time high in 2022. One of the primary purposes of doing this is to get a foothold into the device/network to gather and find the information they want. Cybercriminals mostly choose phishing attacks for email because it is so widespread, and who doesn't use email?

Rather than relying on email to distribute critical data, anyone needing this type of information should request it through a secure request management system set up to vet requests, track approvals, create an audit trail, and provide explicit guidance for use.

III. Cyberattacks are now commonplace

Regardless of the industry, cyberattacks are becoming increasingly common. The upsurge in cyberattacks is likely due to the increase of valuable information due to cyber hackers only getting better at what they do.

Approximately 11.7 million Americans are hacked yearly, roughly one in every three Americans—the data breach results in unauthorized access to computer data, applications, networks, and devices.

Information Overload

I. We are being bombarded by information at home and at work

Having much information available to us anytime we have a question is good. It has pros and cons, but being bombarded and overloaded with information causes a cognitive overload. A study has shown that [1 in 5 Americans feel overloaded by information](#). It may not seem like it, but roughly 20% of your co-workers are in a mental fog.

II. Employees are unable to focus on value-adding work

We can only focus on so many things at a time. When you have excess work, information, and tasks, it takes more effort to focus on what is essential or even know where to start.

Some [symptoms](#) of information overload are inefficient work, confusion, delay in making decisions, lack of critical evaluation of information, loss of control over data, refusal to receive communication, lack of general perspective, greater tolerance for error, anxiety, stress, etc.

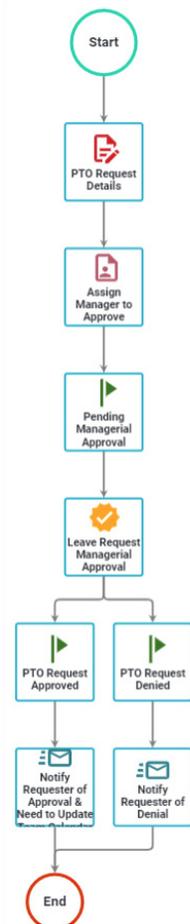
III. Decision fatigue is real

Each of us makes dozens of decisions every day, in many cases without even being aware we are doing so. Not all of those decisions are equal, though; you wouldn't place the same weight on deciding where to go for lunch as you would on deciding whether to hire a candidate for an open position.

Finding ways to reduce the number of decisions employees need to make in the workplace can improve both productivity and the quality of employees' work, freeing their time and brainpower for the decisions that really matter.

Section 03

A Company is a Collection of Processes



Some processes are simple, and some are complex

A [business process](#) is an activity or activity that accomplishes a specific organizational goal. At their core, businesses are a collection of many processes that can be as simple as requesting PTO, getting paid by customers, or launching a new product or service.

I. Requesting time off vs. a product being developed

On the left is a process example of how you could automate a PTO request.

This process would automatically flow with an automated workflow after the employee fills out the initial “request for Paid Time Off (PTO)” form below:

Request for Paid Time Off (PTO)

Person Requesting Date Requested Approving Manager *

Details

Type of Leave *

Vacation Sick Bereavement Jury Duty Other

Start Date * End Date * Hours to Deduct from Leave Balance *

Comments

SUBMIT



The other example was a new product request. This is a very complex request, but it can be automated like the PTO request. It's essential to show that your processes can be automated no matter how complex. Here's an example, on the left, of what a new product request workflow would be like.

This process would automatically flow with an automated workflow after filling out the new product request form:

▼ New Product Request

Product Name Product Type

Product Category
 Home Office Institutional

Is this a customer request?*

 Yes No

Explain in detail what the product is*

Resources required*

 Technical Design Capital

Projected Annual Revenue*

▼ Section

Short Text: Long Text:

SUBMIT

Some processes are entirely manual; some are wholly automated

For organizations that do not have workflow automation in place, all processes are manual. A manual process requires human actions to complete or push a task forward. This could be keying in data, taking notes, filing and sorting documents, sending emails, and anything else that follows this structure.

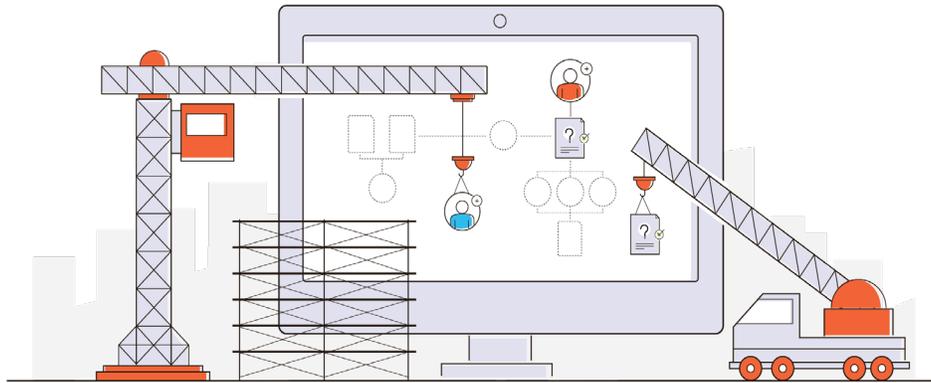
Entirely automated processes save time. These are when there is almost no human action needed. While there are usually human elements to any process, for instance, reviewing a document and providing approval, any workflow can be automated. Ultimately every workflow is just a series of tasks that must be performed.

Automated processes provide several benefits over manual processes:

- Policy compliance adherence
- Reduced approval cycles
- Reduced manual handling
- Improved communication
- Improved visibility
- Improved employee satisfaction
- Continual process improvement
- Better workload management
- Reduced errors

Examples

Every department has processes, more than you might even realize. There are [employee onboarding](#) and [offboarding](#) processes, [IT service requests](#), [invoice approvals](#), [collateral approvals](#), facility access, vacation requests, etc.



Section 04

Process Improvement

What is process improvement

It's one thing to show how a business process works currently; it's another to show how the process could work better in the future.

This is the goal of process improvement—to improve the efficiency and accuracy of a process by reviewing its current state and finding ways of improving it. Process improvement, or “business process improvement (BPI),” can come in many forms.

Motivated and engaged employees can improve the efficiency of business processes via informal, grassroots efforts. They may form self-organizing teams that design and implement solutions to improve process issues.

These organically developed solutions can net real gains in productivity and efficiency. Whether it's a relatively new or old process that has not been updated in years, process improvement efforts can yield significant gains in productivity, efficiency, accuracy, and more.

In a nutshell, consider the following aspects for your improvement project.

- Have a clear strategy
- Prepare for change resistance
- Ensure the proper resources are in place
- Choose the right leader
- Identify expected outcomes

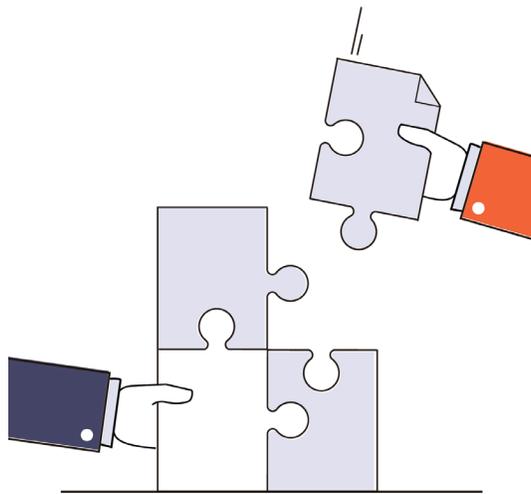
How is it done

I. Organically

Making process improvements organically is having improvements happen over time with no plan. You realize something doesn't work now, and you fix it. There is no specific agenda for the improvement; it just happens.

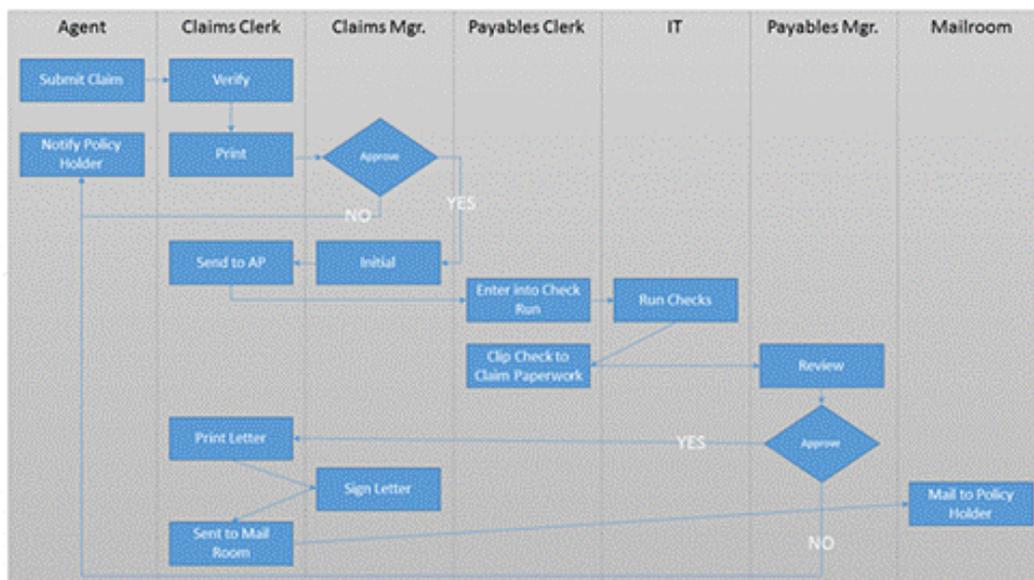
II. Purposefully

Purposefully organizing your process improvement would be having a plan and putting the effort toward a goal. This is recommended, as it would document your processes, give you clear insight, allows you to make adjustments, and you can then implement automation from your findings as well.

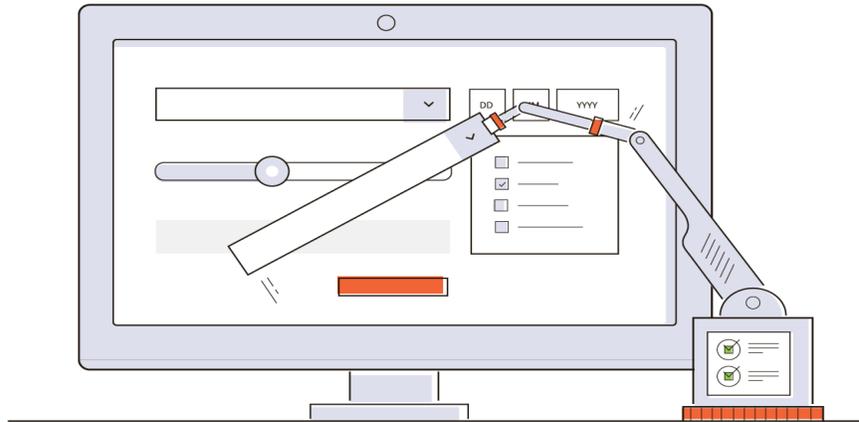


How automation figures into process improvement

Any process can be put through a rigorous process audit and improvement effort. In the example below, we're looking at a Claims Submission process. We've used process mapping to break down the process steps into tasks, connected those tasks to simulate the process flow, and arranged them in swim lanes to show responsibility.



Once the documented process is socialized with all stakeholders and confirmed, it can be moved into a process automation platform. Because process improvement should be an ongoing organizational strength (not a one-time improvement effort), every organization can benefit from adopting a workflow or process management solution.



Section 05

The Rise of Process Automation

Overview

Automation became critical to many companies during a difficult period that saw an unprecedented disruption in the workforce. Ongoing supply chain issues also exacerbated issues with meeting the demands of customers. Many enterprises turned to process automation to ease staffing issues and help current employees work more efficiently without getting bogged down in manual tasks.

Process automation is more than setting a few macros to run automatically on a desktop. With the right software platform, you can enable a full-scale digital transformation of your company. You're adding to your business's capabilities, opening new revenue streams, and positioning your organization for long-term growth.

Where automation can help

People often mistake the role of automation as a way of replacing human workers. A more accurate way to describe automation is [streamlining manual workloads](#) to help free employees up to focus on more valuable work. To effectively use automation in any capacity, you must start by identifying tasks that might be better served if performed by machines.

When you look at any occupation, a sizable percentage of the tasks performed could be automated instead. For example, think of the time an analyst could save if they didn't have to spend hours keying in data from paper documents. What if you could automate the scanning and collection of data from those documents? Analysts could then focus on uncovering valuable insights that help drive business decisions.

Removing that type of clutter from employees' workflow through process automation can expand their output. Reducing the number of tools they are required to access cuts down on the time it takes workers to perform their job. Instead of replacing team members, you're giving them the ability to get more done without bringing in additional people or affecting the quality of service provided to customers.



Types of Automation

I. Forms:

Form automation software is the most straightforward solution to keeping your company at the top of its game and keeping employees focused on tasks that matter. [Forms](#) are the primary means to gather information from users during the execution of a process.

II. Tasks:

Task automation is a way to address problems with manual tasks. By rethinking your workflow, organizations can create workflows that dramatically change how work is done.

Task automation uses software to create processes that reduce the manual completion of simple tasks. In some cases, task automation can reimagine a series of complex tasks. In all cases, workflow automation makes your processes more efficient and your employees more productive.



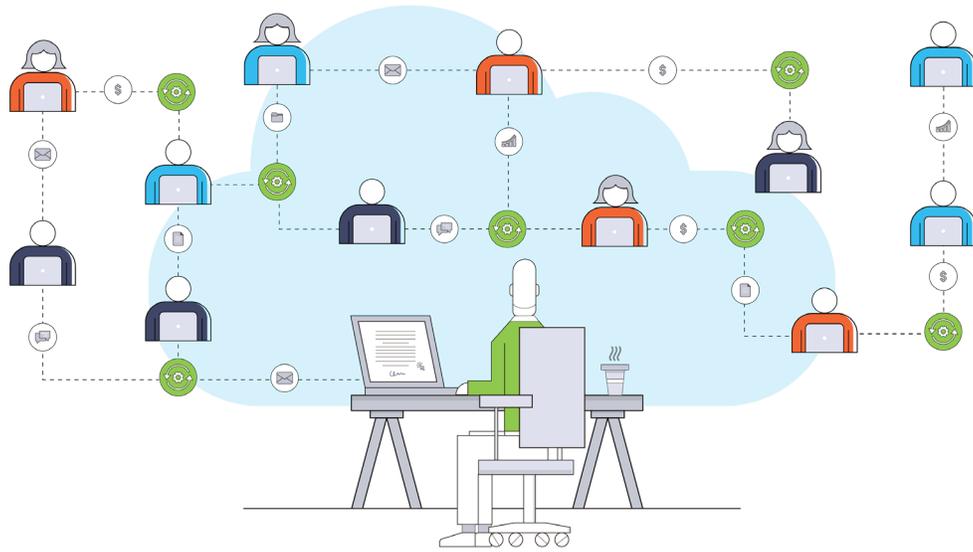
III. Integration:

Workflow integration refers to a workflow automation system designed to connect with applications and databases of record (ERP, CRM, Accounting, HRIS, etc.). Integrated workflow software can replace the limited workflow functionality in those systems while connecting processes across all of them.

Integrating your workflow across your application portfolio improves each application and user experience. Data is passed seamlessly between systems, eliminating the need for users to log in to 3-4 separate applications to complete processes.

VI. RPA:

RPA handles more straightforward tasks versus the more complex processes dealt with by BPA. It mimics the actions of humans, like keying in or copying data from one interface to another. For example, RPA bots can help [sales team](#) members by covering standard administration tasks. An RPA bot could input client information into a billing system based on a received Purchase Order or complete a customer complaint form based on a phone call.



Section 06

Considering Automation

Which Processes

While there are usually human elements to any process, for instance, reviewing a document and providing approval, any workflow can be automated. Ultimately every workflow is just a series of tasks that must be performed. A few specific examples are:

Process automation is more than setting a few macros to run automatically on a desktop. With the right software platform, you can enable a full-scale digital transformation of your company. You're adding to your business's capabilities, opening new revenue streams, and positioning your organization for long-term growth.

- **Customer support** — You can remove the need for CSRs to respond personally to every ticket submission. If it's a common problem with an established solution, you can send standard automated responses back to customers to help with their issues. That way, getting to the critical issues requiring human interaction is more straightforward.
- **Employee onboarding** — BPA software can automatically send out forms and collect electronic signatures, eliminating the need for dealing with a lot of paper. You can also set up on-demand training sessions or connect new workers with mentors to help them learn more about their roles.

- **Operations management** — Use BPA software to track the progression of various projects and communicate with team leaders. Once an employee completes a task, your BPA solution can send a notification automatically to let the next worker in the process know it's time to get started on their work. You can reduce communication errors that lead to ongoing problems.
- **Purchase order requests** — Anyone requesting a company purchase must complete a [purchase order](#) (PO) request. You can program your BPA software to automatically review, approve, or deny a PO based on specific criteria. Approved POs can be forwarded to a supplier, with copies sent to all relevant parties.

This is just the tip of the iceberg for processes that can be automated. A few others include:

IT/IS

- [IT Service Requests](#)
- [Security Access Requests](#)
- New Account Setup
- [Change Requests](#)
- [New Project Requests](#)
- [Security Incidents](#)

HR

- Benefits Changes
- [Timesheet Approvals](#)
- [New Hire Management](#)
- [Employee Onboarding](#)
- [Employee Offboarding](#)
- Vacation Requests

Finance

- [CapEx/AFE Requests](#)
- Expense Approvals
- Salary/Wage Changes
- [AP Automation](#)

Integrify customers have automated a wide variety of simple and complex workflows. Workflow use cases give you an idea of what's possible with workflow automation software. [This downloadable resource](#) provides various workflow examples showing how people have used automation to improve their business processes and increase organizational efficiency.

Selling the idea internally

It's essential that you start building a company culture open to automation. Start by engaging with workers and letting them know that the changes are intended to make things easier for them, not function as a replacement. Alleviating those worries typically leads to more openness about the impacts of automation.

Build vs. Buy

When assessing your business needs, you must choose between in-house developed software or commercial (out-of-the-box) packaged solutions. We will look at some of the advantages and disadvantages of each approach. We have an eBook, [Inhouse Development vs. Packaged Solutions](#), that'll look at the advantages and disadvantages of developing software in-house, using the company's resources against buying a ready-made packaged software solution from a vendor.

Selecting a technology

It can be overwhelming to choose the right technology for your organization. Regarding automation, it's not uncommon for knowledge workers to fall into the trap of using what's available or what they're used to when accomplishing specific tasks rather than using the best tool for the job. Some commonly used tools are spreadsheets, email, messaging apps, and web file storage, like SharePoint.

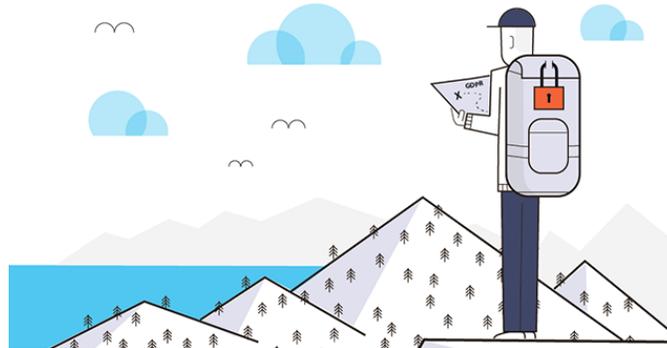
Using email, spreadsheets, Web file storage, and various other tools to cobble together a workflow management system is an expensive and inefficient way to go, instead of relying on manual activities to ensure that workflows correctly between people and systems throughout a business process, use a tool like Integrify to automate tasks, hand-offs, reminders, approvals, and much more.

Selecting a vendor

Companies like Kissflow, Worktec, Flokzu, etc., provide simple workflow tools for small businesses, while Integrify offers robust tools for mid-size and enterprise companies. Integrify's tools have been used by some of the largest organizations with the most complex workflows for over 20 years.

Integrify Offers:

- **A visual Process Builder:** Integrify's graphical process designer interface lets users design custom workflows using drag and drop. Users can automatically assign tasks and route information based on their organization's unique workflow. Also, set alerts, reminders, and escalations to keep work moving forward.
- **A drag-and-drop Form Designer:** Easily create responsive, Web-based forms to capture information. Include various field types, form logic, workflow templates, and layouts to ensure the correct data is captured and routed every time.
- **A customizable Self-Service Workflow Portal:** Provide a unified front-end experience that allows users to submit forms, complete tasks, and track process status. Provide visibility by role to see which tasks are completed, pending, or in progress. Collaborate in real-time about work being performed.
- **Process Reporting:** Integrify tracks and maintains an audit trail of all workflow processes, form data, and user actions. Follow team progress and use KPI scoreboards to track the overall efficiency and drive improvements.
- **Process Integration:** Integrify's open architecture allows customers and partners to create workflow applications with process integration into existing enterprise systems. Standalone web services enable other applications to initiate a workflow, complete a list of tasks, update process statuses, and conduct other bi-directional activities.



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](#)
- [Workflow Ideas Weekly email Newsletter](#)
- [Recorded Demos of our Workflow Automation Software](#)
- [2-Minute Quick Demo](#)
- [Why Choose Integrify](#)
- [Building an Automated Process in Under 5 Minutes](#)

