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FORMVERSE Whitepaper Series

Intelligent Automation, Structured Data & Integration

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Intelligent Automation, Structured Data and Integration

Summary

Companies that have embraced both automation and integrated back-office activities enjoy a 97% greater annual improvement in customer satisfaction rates and demonstrate an increase in meeting quality related SLAs at nearly 5 times that of companies with poor back-office activities.

“Best-in-Class”ⁱ companies do the following to achieve a fully integrated back office (ranked in order):

1. Automate daily business activities
2. Integration/collaboration between disparate enterprise applications
3. Improve visibility into “flows”
4. Involve business users in more business strategy decisions
5. Build-in compliance and traceability to business decisions

Enterprise Automation and Integration play an important role in organizations becoming more efficient.

Steps to building a Best-in-Class Automated & Integrated Organization

5 important considerations when selecting an **Automation Tool**:

1. **Simplicity** – Does it use current resources, sweating assets you already have?
2. **Usability** – Can all end users quickly and effectively adopt the new system?
3. **Integration** – Can it integrate with ALL your other enterprise systems?
4. **Agility** – How fast does it respond to changes in your business?
5. **Design** – Can any department create applications, without programming knowledge?

FORMVERSE EAP & **FORMVERSE PASSPORT** combine to help Enterprises achieve a **Best-in-Class** automated and integrated organization.

Automation & Integration on the Back-Office: Improving Employee Productivity and the Bottom Line!

That's the finding of a study by the Aberdeen Group. You might have wondered: What does "Back-Office" mean? This term often covers everything from Accounts Payable to Human Resources to Business Operations and everything in between. Back Office is often a catch-all term for the programs and activities that companies conduct without directly interfacing with customers or prospects. According to Aberdeen, Automated & Integrated Back-Office Activities are formal programs through which companies constantly strive to improve the productivity and performance of employees who work in the Back-Officeⁱⁱ.

How important is an Automated & Integrated Back-Office?

Another studyⁱⁱⁱ performed by the Aberdeen Group shows that "...companies with integrated back-office activities enjoy a **97% greater annual improvement in customer satisfaction rates**, compared to those with poor back-office activities." Even more surprising, is that companies who have automated and integrated back-office activities experienced a **5x increase in meeting quality related SLAs** vs. companies with poor back-office activities.^{iv}

Top 5 Organizational Business Priorities

Each year, Gartner Inc. surveys^{v,vi} up to 3,000 CIOs, and every year the top 5 business priorities include these items:

1. Digitalization of activities to reap economies of scale and scope
2. Building business agility
3. Business cost optimization
4. Optimizing enterprise operational excellence
5. Automation

All these priorities are proven to drive enterprise growth.

How Does My Organization Get There?

Aberdeen points to a survey^{vii} for the answers. Aberdeen interviewed over 400 corporations and found that “Best-in-Class”^{viii} companies do the following:

- Automate processes to be more efficient (**Automation**)
- Promote collaboration between business units (**Building Business Agility**)
- Adding visibility to and digitizing workflows (**Digitalization of Activities**)
- Involve the line of business in more business strategy decisions (**Optimizing Enterprise Operational Excellence**)
- Build-in compliance and traceability to business processes (**Business Cost Optimization**)

Of all the priorities mentioned, **Automation of processes to be more efficient**, and the **Promotion of collaboration between processes and departments**, and **Sharing of information between systems and departments** add the most tangible value to enterprise organizations. According to the Aberdeen’s survey, these two strategies have helped Best-in-Class organizations reduce cycle time of key business processes by 18% in the 12-month period preceding the survey! While the industry average was a mere 4% decrease. This was an improvement of 450% above the industry average.

Visibility and measurement are key requirements in achieving these kinds of results. Aberdeen’s survey points out that Best-in-Class companies are twice as likely as other companies to be able to **measure those cycle times**, and have real time visibility into the **status of all automated processes**. Best-in-Class organizations also **have increased agility** and can **react quickly by updating processes** as new best practices and technologies emerge.

Steps to Build an Automated & Integrated Back Office

We know where it is your organization needs to go, and we know the key areas to focus on. But, how do organizations:

- Effectively automate business processes?
- Share information between systems and collaborate between departments?
- Optimize operational excellence and improve cycle times?

- Create transparency and receive status on processes?
- Build business agility by reacting quickly and updating processes when needed?

Most organizations have started to adopt some sort of Business Process Management (BPM) or Robotic Process Automation (RPA) solution. The problem with BPM/RPA solutions is that most tools are too expensive and too difficult to actually use. They require dedicated Application Software Developers or expensive consultants. This results in a lack in the ability to easily to configure integrations, cannot perform unattended automation capabilities or don't have the enterprise functionality needed to solve the enterprise's problem.

Selecting the Right Tool...

In a white paper^{ix} by Oracle Corporation, the author points out that "The B in BPM stands for Business, and these are the people who interact with the process on a regular basis, who understand the operational limitations, and who have ideas for improving the process. There is an increasing desire among the business users to get into the driver's seat while creating business applications. Business users want to manage the design and execution of business processes." This is where **no-code** application development platforms create real value for enterprises, when combined with automation, integration and reporting capabilities creates maximum value for today's largest companies.

Here are four points to consider as you are considering the right **no-code** application & automation tool:

1. **Simplicity** – Use what you have!

- a. Your organization chose to spend a lot of money on its existing infrastructure, why not "sweat" these assets? If your enterprise is like most, you have Microsoft infrastructure involved in every part of your business. Your existing infrastructure most likely includes: Microsoft Exchange, SQL Server, Active Directory, Windows Server, IIS etc. Microsoft technology is vital to every Enterprise. Find an automation and application development platform that can leverage that existing Microsoft Infrastructure.

2. Find a tool that is **Easy and Usable for end-users!**

- a. No one is going to use a new tool if it is not easy and intuitive. Pick a tool that makes life easier for staff and external parties (vendors, suppliers, customers etc.), not more difficult. Far too many organizations select full featured (BPM) solutions or state of the art technologies (RPA), only to find out that administrators and end users don't use or fully utilize them. Most of the time, a new system must be forced upon admins/users in a way that causes internal strife/resistance. Shouldn't your employees enjoy using the software solutions that are being paid for?

3. Find a tool that **Integrates with your other systems!**

- a. If your automation or application development platform does not make it easy to integrate with your other systems, it is more than likely not worth implementing. Selecting a platform that leverages existing technology infrastructure and integrates with your ERP, HR, CRM, CMS etc., makes adoption extremely easy. Reducing data entry and repetitive tasks ensures employees will actually use the provided solution.

4. Find a tool that gives you the **Agility you need to react to changes in the business!**

- a. Oracle points out that "Business agility is all about being able to adapt to the changing circumstances." "... if your systems are not designed to change easily, even the most efficient organization with good business visibility will be at a disadvantage. If there is a need to change the business process due to change in business demands, you should be able to make that change immediately."

We couldn't agree more!

5. **Design** – Find a tool that makes it easy for departments to create their own automation applications!

- a. It seems like creating applications with some tools require a PhD in Electrical Engineering. There are tools with very advanced functionality, but if IT resources need to be deployed to create every application or automate something, interest in the project will quickly be lost. Make sure to choose a tool that employees in every department can actually use, that's the only way that you'll have the agility to really make a difference and see the value out of a solution.

Where does **FORMVERSE** fit in?

A tool with **Powerful Enterprise Intelligent Automation Functionality** that is still **Easy-to-Use** for both end-users and management, that leverages your **Existing Infrastructure**, that helps individual departments **Create their Own Custom Applications**, and can **Quickly Configure and Rapidly Deploy those Applications** as needed and can be **Integrated into any Existing Enterprise Application** is what we've created with **FORMVERSE Enterprise Automation Platform**.

Today, the vast majority of enterprises still complete a lot of process driven work by attaching some kind of document to email. In addition, employees often have to switch from application to application to carry out business processes (e.g., from email to Excel or Word, or to an ERP/CRM module, or to a "point solution" such as an expense report management tool). All of this is highly inefficient and ineffective, resulting in wasted time and resources, significant unnecessary costs, and poor responsiveness to process participants (both internal and external to the company). Ultimately, this negatively impacts a company's productivity and bottom line as well as its agility in the marketplace.

FORMVERSE's solution to this challenge is to leverage the organization's existing infrastructure (Exchange, SQL Database, IIS etc.) by allowing customers to create **no-code** intelligent automation applications. These applications centralize end users day-to-day functions into one easy to use web interface. Any data, metadata or attachments collected throughout the application "flow" is automatically saved in an SQL database and can be easily integrated with existing enterprise applications (ERP, HCM, CRM, CMS, Document

Management) in a completely **automated** fashion, enabling more timely and informed decisions associated with these processes.

With the **FORMVERSE** solution, unautomated work can be quickly and easily fully automated in a fraction of the time, and at a fraction of the cost of using BPM/RPA systems. By committing to automation, enterprises will achieve significant time and cost savings through greater efficiencies, as well as attaining more timely and accurate results.

Key features of the FORMVERSE solution include:

- **FORMVERSE EAP access rules** – **FORMVERSE** administrators can define specific rules regarding which users have access to which applications. Once defined, authorized users can start a process by simply choosing an application.
- **FORMVERSE EAP processing rules** – **FORMVERSE** administrators can define specific rules for the processing of **FORMVERSE** applications to ensure that data/applications are routed to the appropriate person until the automated flow is complete. Processing rules also determine if and when data contained within a **FORMVERSE** application needs to be extracted and where the extracted data should be placed (e.g., an enterprise application or database).
- **Intelligent Automation capabilities** – **FORMVERSE EAP** can execute complex automation functionality against pre-defined access and processing rules.
- **Visual design for flow automation** – Automation flows are designed with **FORMVERSE EAP Template Editor**, an intuitive and user-friendly graphical interface editor. Visualized automation diagrams provide a straightforward way to review, understand and simplify even the most complex processes.
- **Easy integration with other enterprise applications** – With **FORMVERSE PASSPORT**, **FORMVERSE** applications can be used as an effective way to securely collect data, which can then be extracted based on recipient defined processing rules and integrated with enterprise applications and databases.

Key benefits of the FORMVERSE EAP solution include:

- **Lower implementation costs and faster time to benefit versus BPA or RPA systems** – BPA and RPA systems are very expensive from a software purchase, implementation, and ongoing maintenance perspective. Implementing with **FORMVERSE** is much more cost-effective.
- **Ongoing cost savings due to efficiency and productivity increases** – By automating existing manual processes, companies gain significant cost savings due to greater efficiencies and productivity across the organization as well as reduced costs (employees spend less time dealing with inefficient processes and more time on the higher priority, more strategic aspects of their job).
- **Greater ease of use, resulting in more rapid adoption of the automated processes** – **FORMVERSE** applications are designed to be developed, deployed, and used by business users. **No-code** Automation Application templates are designed using an intuitive graphical interface, resulting in faster and more complete adoption by the organization, leading to the corresponding cost and efficiency benefits.
- **Better, more informed decisions** – By enabling the rapid automation of existing manual processes and collecting the data disseminated through these processes for integration with enterprise applications and databases, **FORMVERSE** enables more timely and informed decisions associated with these processes.



FORMVERSE Overview

Discover how **FORMVERSE** can automate a solution for Purchasing and Procurement Requests, one of our many use cases:

- <https://vimeo.com/formversevideos/review/325661175/a1128411b8>

Conclusion

Striving for Best-in-Class Automation is made easy with **FORMVERSE EAP**. The impact on your organization is significant.

Best-in-Class organizations use automation to increase employee efficiency, which leads to enhanced customer satisfaction and a higher percentage of SLAs achieved.

Tools for automation should be easy-to-use for both end-users and management, leverage your existing infrastructure, be something that individual departments can use to create their own **no-code** application, and be able to rapidly deploy and quickly reconfigure applications.

Consider **FORMVERSE EAP** for **Intelligent Automation**, **No-Code Application Development**, or for **Integration** to complex enterprise applications.

Learn more at formverse.com!

ⁱ Best-in-Class= Top 20% of respondents based on performance (Improved Profit Margins, On-time Delivery, Cycle Time of Key Business Processes)

ⁱⁱ Secrets for Improved Productivity & Performance in the Back-Office- Aberdeen Group

ⁱⁱⁱ Advanced Case Management: Empower the Knowledge Worker- Aberdeen Group

^{iv} Figure 1- page 2 of Secrets for Improved Productivity & Performance in the Back-Office- Aberdeen Group

^v Gartner Top 10 CIO Business and Technology Priorities 2012- Gartner

^{vi} Hunting and Harvesting in a Digital World: The 2013 CIO Agenda- Gartner

^{vii} Business Process Management: Looking at the Plan in the Mirror

^{viii} Best-in-Class= Top 20% of respondents based on performance (Improved Profit Margins, On-time Delivery, Cycle Time of Key Business Processes)

^{ix} Business Driven Process Management- Fusion Middleware, An Oracle White Paper, January 2013