nintex

The Process approach to the new normal

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Companies need good processes more than ever

Setting employees and businesses up for success over the next decade requires a renewed look at outdated or undefined processes, especially as operational standards continue to move further away from physical workspaces. Employees require the proper software to collaborate and dynamically access appropriate company data and mission-critical tools, from wherever they're working.

Companies must do more with less by empowering workers with digital automation tools that eliminate manual tasks and establish efficient processes and workflows. The future of work is coming sooner than expected — and digital business maturity is swiftly becoming an expectation as employees demand more flexibility.

The long-term fallout of COVID-19 underscores capabilities all companies must have moving forward, reinforcing the importance of building a culture that enables productivity anywhere.

Think of process changes necessitated by the mandatory move to a remote workforce during the peak of the coronavirus pandemic. Though some companies were well-equipped with existing documentation, many likely weren't. These organizations thought on their feet during the transition, but lacked visibility into processes or neglected to document and define key changes amid the chaos.

Process blindness will create challenges moving forward when companies attempt to standardize and govern work-from-home and work-from-office policies. A recent Gallup poll found that 43% of companies have work from home policies, leaving many companies scrambling to catch up when ordered to shelter in place. Almost 90% of employees expect more people will work remotely more frequently as an outcome of the crisis, meaning all companies will need to implement permanent policies. But to create these policies, HR needs solid processes to regulate working from home versus working from the office.
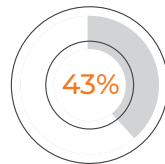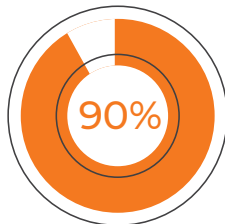
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WHAT MAKES A PROCESS "GOOD?"

Though an "automated process" isn't directly synonymous with a "good process" — a poorly mapped or managed automated process can be as ineffective as an undocumented paper-based one — automation tools hold potential to manage workflows, eliminate steps and create secure, enduring processes that transcend physical barriers.
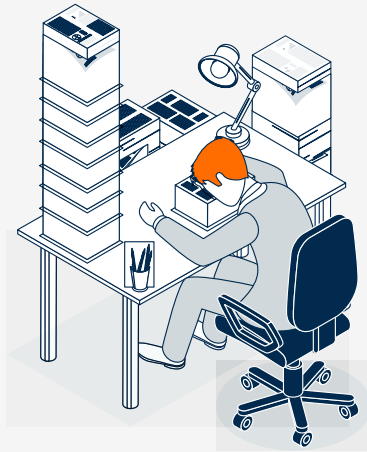
Manual processes continue to dominate our workflows

Despite the emergence of process technology more than 20 years ago, paper-based and manual processes persist across industries. Many industry leaders have already embraced robotic process automation (RPA) and other transformative technologies. But other companies haven't been as quick to adapt, with McKinsey reporting that 68% of processes remain manual. In a stable economy with predictable decisions and processes, companies were able to make do without this technology. Now, they need it to survive.

However, companies face many challenges in their attempts to transform using process management and automation tools

DIFFICULTY IN IMPLEMENTATION
Sophisticated coding tools require devoted developers and result in bottlenecks.

LACK OF VISIBILITY INTO THE PROCESS
Processes aren't well-defined, documented or mapped.

LACK OF POWER OVER THE PROCESS
Many existing tools in the marketplace are designed for simple, localized processes and personal control — not enterprise-grade processes.

As we continue to adjust the ways we work, we need an understanding of the short- and long-term impacts that operational changes have on our processes. To succeed, leaders must excel at process management and automation.

CASE STUDY 1

Onboarding a new employee (HR) or new client (banking)

In the office, it's easy for IT to set employees up for success: A new employee receives a fully configured, ready-to-use laptop and can access support as needed. But how does that process look different in a work-from-home setting? How would an employee replace a broken laptop? Clear processes are critical when onboarding a new employee — or a new client — can't happen face-to-face.

CASE STUDY 2

Public records management (gov)

Many local governments carefully maintain physical cabinets filled with public records not considered confidential — such as court proceedings, electoral polls and marriage records — that the public has the right to request and receive within a legally authorized timeframe. But records requests are tedious and time-consuming for the public, and slow and repetitive for government employees even under normal circumstances. How can these departments manage contingencies when they're made to work off-site?

Companies need powerful, simple tools that provide employees and managers with more visibility and opportunities for efficiency. The more you can equip teams with tools that boost productivity, the better prepared your team will be to face future challenges, and the more time they can spend on strategic endeavors.

Nintex looks at workflows and business processes in three distinct, cyclical phases: **Management, Automation and Optimization**. Keep in mind: Even after you've identified processes suitable for automation, phase one is never truly complete. No phase of our process approach includes a clear end point that delineates one phase from the next. As such, mapping must be a continuous process that occurs anytime procedures are changed, occurring in harmony with process automation and optimization to deploy tech most effectively.

Mapping, managing and governing processes

Without a deep understanding of processes across your organization, you have little chance of improving or automating them. Assessing and defining your existing processes should be your first step — and a component of every step to follow — toward an efficient response to business change.
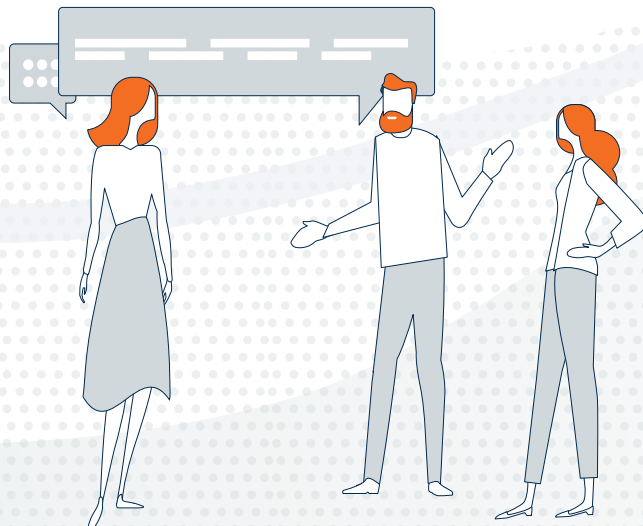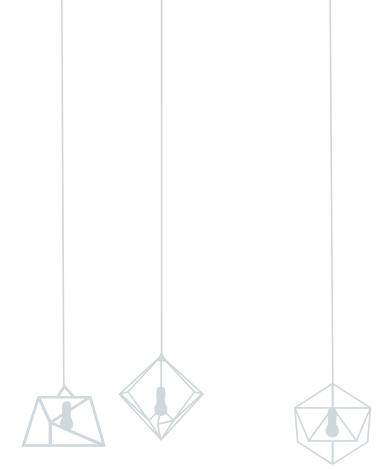
Pitfalls of poorly defined processes

A lack of clear organizational process documentation across teams and departments can derail business performance in the event of changes to personnel, operating conditions or strategy.

Many **HR and sales teams managing the onboarding of new employees or clients** rely on manually standardized and document-heavy workflows, leaving room for error through lost documents or missing signatures. Team efficiency is further hindered by tedious back-and-forths that slow down the hiring process and sales pipeline.

Local governments managing long lists of public records requests continue to rely on labor-intensive processes to fulfill requests. Teams spend hours searching through physical files that could be better spent on higher-value tasks.

The opportunity — and urgency — in mapping processes

Process mapping offers visibility into workflows and reveals opportunities for standardization. In addition to laying out a clear overview of processes across businesses, these tools enable you to assign tasks to teammates and maintain oversight of core processes.

Today's best process mapping platforms simplify the identification and mapping of processes by enabling teams to:

ASSIGN STAKEHOLDERS to each step of a process and collaborate across your organization.

USE ROI CALCULATORS to collect real-time feedback on business processes.

ANALYZE DATA to identify areas for improvement and automation within existing processes.

CASE STUDY 1

Assess and document onboarding processes

Identifying the correct documents to direct to a new employee or client; determining which team member will conduct training, what it should cover and how it should be formatted; giving correct teammates access to information on and governance over company applications.

CASE STUDY 2

Streamline public records requests

Simplifying the public records request process via mapping tools that provide greater visibility and control to citizens; maintaining oversight of the number of government employees involved in request response; determining where information is stored and how to access it.

PHASE TWO

Process automation

Once your organization has a clear map of its process, you can identify the tasks best-suited for automation. At this point, teams can begin deploying small-scale process automation solutions as Proofs of Concept (PoCs) that can be scaled across your organization. Maybe this means localizing automation initiatives to a single department or focusing on a simple manual task you want to automate.
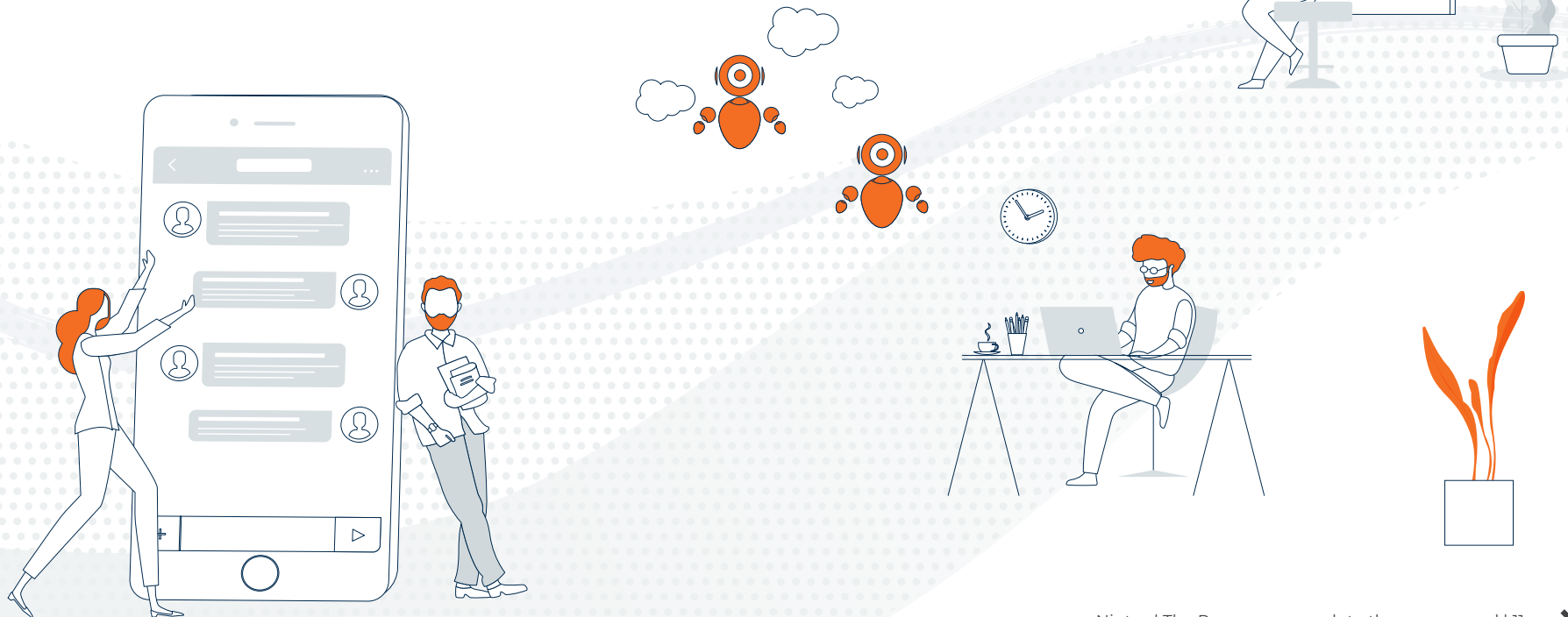
The need to automate simple tasks

Teams expected to perform long lists of repetitive tasks that add little value and poorly align with job descriptions are at increased risk of burnout, particularly when they must accommodate additional business disruptions — like remote work.

A **remote onboarding process for a new employee puts strain on HR teams and new employees.** Conducting virtual training and ensuring employees are onboarded correctly will be challenging for companies with legacy tools and strict policies on where and how contracts can be signed. These restrictions and otherwise lengthy approval processes during onboarding result in higher overhead costs and lower morale.

Similarly, there's no reason why public records requests and fulfillment should not be a fully digital process by now. But **many government agencies still rely on paper-based processes** that require a trip to a government building to access records. Even when in-person manual processes are possible, records requests take weeks to fulfill and are highly prone to errors.

Considerations during automation

Automation solutions integrate with a company's mapped and managed processes to form workflows that trigger actions based on specific events. Applying automation doesn't require you to throw out existing technology — many sophisticated solutions allow you to apply workflows to existing, mapped processes.

Automation includes many capabilities, from machine learning tools to RPA to workflow optimization. As your company looks to automate, your business must consider:

WHAT TYPE OF TASK AM I TRYING TO PERFORM? Screws need screwdrivers; nails need hammers. Remember two processes may require different solutions (e.g., RPA eliminates repetitive digital tasks, while workflow automation triggers a chain of events).

WHERE'S THE HUMAN ELEMENT IN THIS PROCESS? If this is a task that's strategically complex even for a human, it's much too complex as a first automation initiative.

HOW CAN I USE AUTOMATION TO UNLOCK NEW DATA INSIGHTS? Automation can use data from the backend of business forms and spreadsheets to initiate a workflow.

CASE STUDY 1

Optimize new employee experience

There are typically many stakeholders involved in a new hire or closed business deal, requiring a specific flow of approvals. Workflow automation can easily generate offer letters and other documents using data from existing letters, then trigger the email to send to various stakeholders in the correct order.

CASE STUDY 2

Accelerate citizen requests

With a virtual platform for public records submission requests — and a secure, cloud-based storage system for those records — government employees can locate requested documents with the click of a button and share them with citizens more efficiently.

If companies rely exclusively on employees to perform more tasks in less time they must then equip teams with tools that make high performance possible. Automation standardizes and streamlines processes across your organization, allowing you to play a strategic role in identifying future opportunities to optimize employee time.

PHASE THREE

Analysis and optimization

Moving from phase two to three is a gradual and continuous process, and one that should always be accompanied by solidly mapped business processes. Without continuously modifying and reinforcing machine learning models with new data, performance will falter when conditions change or new applications are introduced.

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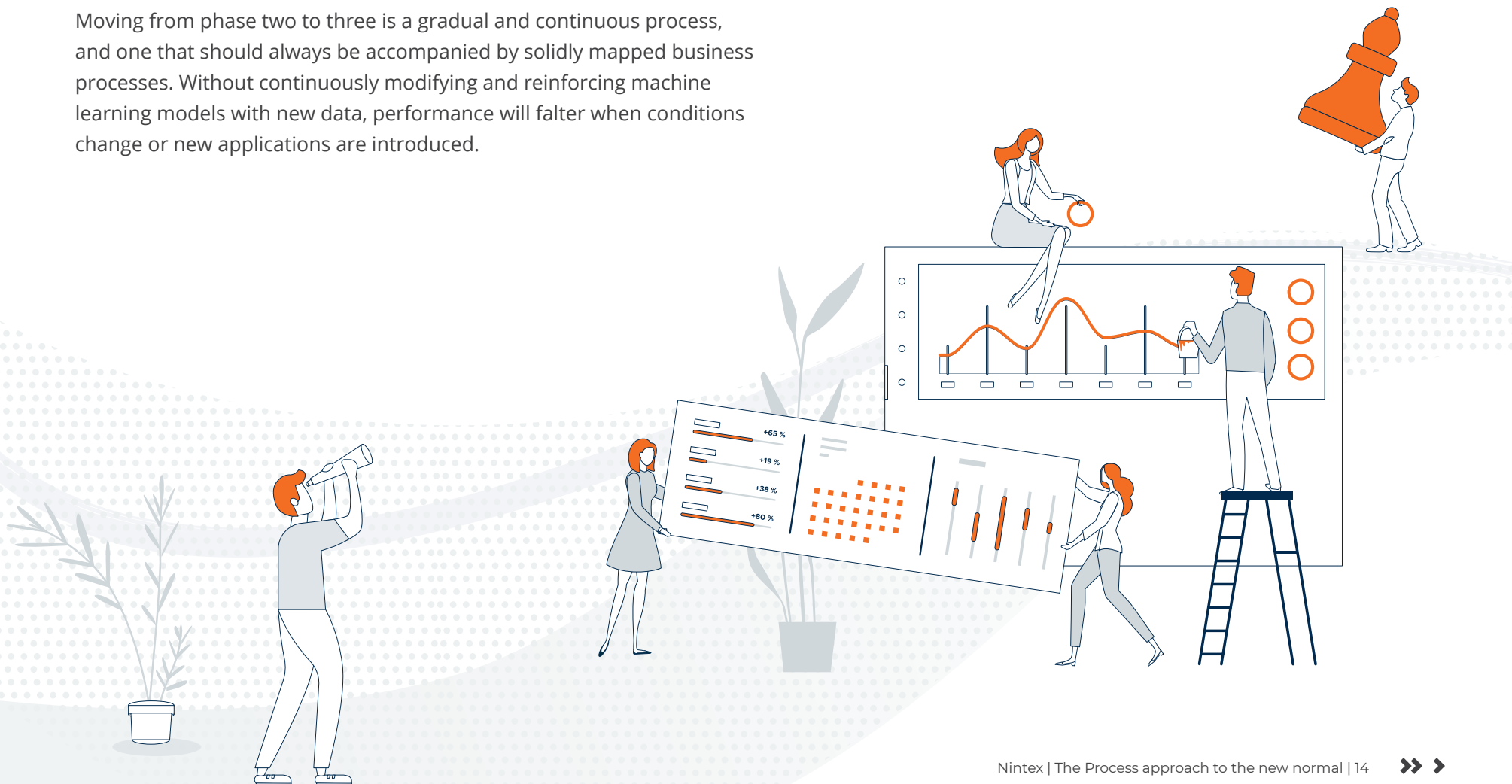
The risks involved with one-off automation initiatives

Automation projects that fail to respond to changes or new applications are usually major investments that don't offer sufficient return to companies. As businesses scale and shift, automation tools must do the same.

As new HR policies are implemented or contingencies are added to contracts, sending a generic new employee packet may no longer fit the bill. Without an easy way to update existing forms and workflows that were previously automated, **workers will revert to manually inputting information into contracts.**

If digital records of requests and data aren't carefully maintained and monitored, delays can still occur. For example, if a teammate leaves and a workflow hasn't been adjusted to reflect changes to chains in command, documents may be sent to the wrong people or in the wrong order.

Creating value through optimization

To create the most value using automation, teams must continuously work to monitor, analyze and improve processes. In this phase, teams have a greater ability to move into more advanced workflows through data analysis because they've built out a more robust data set and have an understanding of what's working and what's not.

During this phase, companies optimizing automation solutions may:

USE DATA to optimize business processes

USE MILLIONS OF DATA POINTS over time to fine-tune models to become increasingly more efficient and high-performing

DECIDE A TASK is better performed by a person and end PoC

CASE STUDY 1

Improve onboarding experience through optimization

With sophisticated automation tools in place, bots can be trained to perform long sequences of tasks, interacting with various applications and pieces of information accordingly. They can also begin to interact more directly with data you've gathered. If you notice it's taking a long time to get a signature on an onboarding document, for example, you can add a deadline somewhere in the process.

CASE STUDY 2

Optimize government processes continously

While workers focus on meaningful tasks, bots can learn to direct data requests to the correct teammates, notifying them when action is needed. By tracking communications through digital platforms, government teams ensure they're maintaining compliance and streamlining repetitive processes.

The most effective, streamlined processes are those that have been automated and optimized using solutions custom built by the companies and teams set to use the tools. Needs differ by team, department and business, so to create and manage processes built to last and scale with your business, you need proper upskilling and preparation to take the leap.

CONCLUSION

Digital process automation empowers workers in your business — from frontline receptionists and retail staff to backend knowledge workers like HR and finance teams — by allowing them to focus on higher-value, more strategic tasks. When leaders make digital transformation a collaborative process, they earn the trust of wary employees and gain better visibility into which business processes are providing value and which aren't. Here's how companies can create processes that drive business success.

HELP EMPLOYEES IDENTIFY AND MANAGE BUSINESS PROCESSES.
Corporate policies and processes tend to be needlessly lengthy and tedious. Maybe your PTO request process requires more than one round of approvals. Or maybe just a single IT staff member understands a piece of software and can conduct onboarding. Using easy-to-use digital process automation solutions to build applications and platforms that provide knowledge workers with the tools and resources they need enables employees to self-manage their own processes.

DISTRIBUTE PROCESS KNOWLEDGE ACROSS STAKEHOLDERS.
When institutional knowledge on process is kept vaulted by company leadership, teams may hesitate to adopt changes to their roles or processes. Leaders need to be transparent about workflows and introduce opportunities to make processes more visible across their organizations.

CONTINUE TO IDENTIFY OPPORTUNITIES TO AUTOMATE AND OPTIMIZE.
Successfully deploying a scaled automation project is a major victory, but doesn't mark the end of a transformation journey. Smart business leaders continue to look for opportunities to incorporate morale-boosting tools into workflows — and encourage their frontline workers to do the same.

To succeed in the coming decade, your organization will need to ensure your business processes are carefully documented and managed. Ready for a process mapping and workflow automation solution that gives your workforce a roadmap for success? Nintex is here to help.

About Nintex

Nintex is the global standard for process management and automation. Today more than 8,000 public and private sector clients across 90 countries turn to the Nintex Platform to accelerate progress on their digital transformation journeys by quickly and easily managing, automating and optimizing business processes.

Experience how Nintex and its global partner network are shaping the future of Intelligent Process Automation (IPA). Learn more at **www.nintex.com**

Put The Power of Process™ to work in your organization.

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