



Technology Insight

Finding Your Perfect Automation Solution

An e-book for business professionals

synergi

Finding Your Perfect Automation Solution



Finding an effective automation solution is a process that requires you to consider a number of factors: What is your budget?, What is your organisational structure?, Where do your current inefficiencies lie?

This e-book can't answer these questions for you, but it can instead equip you with a wealth of knowledge on how to approach picking an automation solution and on the solutions available, supporting you with this process.

This e-book overviews the current automation landscape, leading solutions, and considerations to make when choosing your automation solution.

 Watch our 'Finding Your Perfect Automation Solution' Webinar

Meet the author



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*Chief Operating Officer, Synergi
Nintex vTE (Technical Evangelist)*

Justin co-founded Synergi in 2013 with a mission to support businesses digitising and transforming their processes. With over 25 years of IT experience, Justin specialises in business intelligence, automation, collaboration and modern workplaces.

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The current landscape of automation

Automation today

Before we explore automation and technologies in more detail, we need to first think about process culture and typical challenges that organisations might face.

Key drivers

- A large percentage of processes are still manual
- Processes span many systems
- There is friction in current collaboration and productivity solutions
- Reliance on paper

Automation culture today

- Automation encompasses more than just workflow
- There is a focus on end-user experience and productivity
- AI is playing an increasing role
- Organisations are balancing low-code with pro-code (apps are increasingly built by non-developers)
- Organisations are building a culture that supports automation

Weak process culture: Danger signs

- No agreed way
- No end-to-end view
- No collaboration
- Apathy or disengagement
- Process automation seen as specialist ('nothing to do with me')

Culture of continuous development: The vision

- Visibility into processes
- Simplicity
- A central source of truth
- Easy feedback and engagement
- Clear audit trails
- Supported understanding of cycles and costs

A
Formula
for
Success

Vision
+
Skills
+
Incentive
+
Resources
+
Action
Plan
=
Serious
Change

Nearly 50% of surveyed employees said that many of the processes within their organisation do not work effectively.

77% of those surveyed said that they can't automate processes on their own because they are reliant on IT or operations to automate tasks and processes.

52% of employees would leave their organisation within the next 12-18 months if the new organisation made it easier to get work done and had fewer manual processes.

55% of the world's employees spend or waste at least 25% of their time working on manual tasks that could be more automated.

38% of those surveyed said their organisation had multiple, conflicting processes in place.

Meet the tools



Microsoft Power Platform

Microsoft Power Platform brings together several powerful components to analyse data, build solutions, and automate processes. It sees over 3 million monthly active developers, offering organisations the opportunity to foster efficient, productive, and transparent processes using low-code technologies.



Power Apps

Power Apps is a low code approach to custom app development, allowing users to quickly create apps, either from scratch or from a selection of templates, using a point-and-click approach. These apps can then be extended or customised as needed and published to the web, iOS, Android, and Windows 10. Power Apps easily connects to data, with the ability to use Excel-like expressions to add logic and offers native pro-developer extensibility, through which our technical experts can deliver any required extension of app capabilities.



Power Automate

Power Automate gives business users the power to create automated workflows between apps and services in order to receive notifications, synchronise files, collect data, and more in only a matter of clicks. Power Automate integrates seamlessly with hundreds of prebuilt connectors, allowing users to easily and automatically harness the power of their business tools.



Power BI

Power BI is a business analytics tool that allows you to easily connect to data sources, create visuals, and gain business intelligence quickly. With the ability to connect to Microsoft, third-party cloud services, and on-premise data sources easily, teams can access and analyse data quickly and remotely, creating strong visuals such as charts, dashboards, and maps to spot data trends. This centralised, easy-to-digest data presentation keeps teams united and informed.



Power Virtual Agents

Power Virtual Agents allows users to harness a simple, graphical interface to build and maintain chatbots, automating solutions to common customer and internal facing issues. You can also monitor and improve chatbot performance using gained insights available in an easy to read dashboard, freeing up your employees time to focus on high-value interactions.

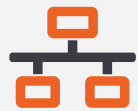
Coming Next:

- Power Fx
- Power Automate for Desktop
- Power BI Premium



Nintex

Serving over 50% of the Fortune 500, Nintex is the world's largest privately held software vendor for process automation. The Nintex suite offers tools that support process excellence from end-to-end, offering organisations stronger visibility into their processes.



Manage

Map and document your processes in an easy-to-use central repository



Automate

Digitise and automate your key processes using workflows, digital forms, and mobile apps



Optimise

Visualise your key process analytics and easily spot trends and inefficiencies

Process Mapping

Nintex Promapp offers businesses the ability to visually map out processes in a matter of clicks, offering an accessible visibility. You can access and edit these processes in a central repository making collaboration, reporting, and auditing easier than ever.

Workflow, forms, and mobile apps

Automation tools such as workflows, digital forms, and mobile apps allow processes to remain in motion when individuals are working remotely or on-the-go. Additionally, in automating key processes, you can ensure consistency, compliancy, and efficiency.

Document automation and eSignature

Business is on the move. Document generation allows for the easy creation of content and brand compliant documentation from wherever you're working. Even better, e-signature capabilities allow processes to be kept in motion even when teams aren't together.

Process Analytics

Once you've invested in mapping and automating your processes, access Nintex's analytics tools allowing you to visualise your process data and clearly note trends or bottle necks. These analytics can then inform key business decisions and further automation decisions.

Key considerations

Key

- ✔ Strengths
- ❓ Considerations



Ecosystem

- ✔ Strong integrations across Microsoft 365, Dynamics 365, and Azure
- ✔ Rich array of connectors, services, and functions
- ❓ Many data sources require premium licensing
- ✔ Native connectivity to many cloud platforms
- ✔ Expanding connectors for custom actions
- ❓ Move to Nintex Workflow Cloud is creating new challenges for existing Microsoft workloads

What are you building?

- ✔ Power Apps provides a powerful app framework
- ✔ Dataverse is a highly scalable and flexible data model
- ❓ Larger, more complex workflow scenarios can become challenging
- ✔ Lifecycle integrations between mapping, workflow orchestration, and analytics
- ✔ Intelligent forms designer for start forms and tasks
- ❓ No app framework beyond forms, workflow, and mobile experience (yet)

Performance & lifecycle

- ✔ Ability to embed, call, and trigger workflows from Microsoft 365 and apps
- ✔ Performant and scalable processing
- ❓ Run duration limitations
- ✔ Designed for enterprise-grade workflow and performance
- ✔ High availability platform supporting high-volume workloads and throughputs
- ✔ Monitoring and analytics support optimisation
- ❓ Need to be aware of limitations on apps and services that you connect into

Your audience

- ✔ Power Platform seamlessly engages internal audiences
- ✔ Can be extended externally through Power Apps portals
- ❓ Power Apps Portals require additional deployment and licensing
- ✔ Enables authenticated and unauthenticated users
- ✔ Triggers and workflow interactions
- ✔ Single sign on options make experience seamless
- ❓ Multiple domains can require configuration



Citizen developers

- ✔ Generated a lot of interest in low-code platforms
 - ✔ Enable transition from simple to complex apps
 - ❓ Many 'makers' transition from business roles into IT
- ✔ Simple drag and drop designers across the platform
 - ✔ Logic and rules applied in no-code designs
 - ✔ Business users build apps and maintain solutions
 - ❓ Workflows can scale in complexity and integrations/Xtensions may require IT support

Documents & e-signature

- ✔ Can generate documents and control conditional outputs
 - ❓ More complex and time consuming, especially at scale
- ✔ Rich document generation action in workflow designer
 - ✔ Can conditionally combine many templates and output formats
 - ✔ Integrated eSign with NintexSign
 - ❓ Document generations and signatures require license bundles

Licensing & costs

- ✔ Ability to extend Office 365/SharePoint
 - ✔ License the parts of the Power Platform that are required
 - ❓ Complex model which makes costing challenging, external adds to licensing costs
 - ❓ Predicting future costs to scale can be hard
- ✔ Based on a per workflow/botflow foundation
 - ✔ Can license platform as required across workflow, RPA, Promapp, DocGen, etc.
 - ✔ Easier to model pricing and predict future costs
 - ❓ Minimum entry points of 10 workflows
 - ❓ DocGen and eSign require add-on bundles to workflow

Nintex + Power Platform:
Even better together

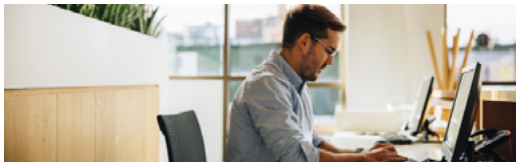
Uniting Power Platform and Nintex



So far this e-book has explored the Microsoft Power Platform and Nintex as entirely separate entities, options to choose between. As highlighted, both Power Platform and Nintex hold different strengths across different areas and therefore many of our customers have found it beneficial to utilise both tools. In using both technologies organisations can reap wider benefits, deploying each technology where most appropriate and powerful. Whilst this option is not achievable for all organisations, businesses of varying sizes, for whom this was practical, have benefitted from doing so.



Benefit from Power Platform's app framework and extensibility



Build on the flexibility of Dataverse as a data-model



Benefit from Nintex designers and ease of use



Build out powerful document generation capability



Map and understand your processes using Promapp



Optimise your license investments across both technologies

Key Takeaways

Processes are about more than actions, they're about culture

Whilst digitising and innovating individual processes is an important and effective step, to truly optimise operations, businesses must look to strengthen their process culture. This involves introducing an end-to-end view of processes, implementing clear ownership, and encouraging departments to monitor, automate, and innovate their own processes. This much is made possible through investment in highly-visual, drag-and-drop process mapping and automation tools such as Microsoft Power Platform and Nintex.

Low-code or Pro-code: It's not an either-or situation

Successful process culture is not necessarily about handing the power to automate over to business users, it is about knowing when this is most beneficial. Most organisations introduce low-code tools to democratise process innovation; but for larger and more complex processes the assistance, guidance, and capabilities of a pro-code solution and IT specialist may still be required and beneficial.

Unite technologies for a solution that best meets your exact needs

Different technologies, across low-code and pro-code will offer differing benefits and challenges. Many organisations choose to utilise multiple technologies to reap wider benefits, customising an automation solution that best suits their individual needs. A digital partner can provide expertise and practical knowledge on which technologies are most appropriate where, helping you design a solution that truly optimises your processes and helps you reimagine your process culture.



About Synergi

Founded in 2013, cloud solutions and managed services provider, Synergi, was created to meet the fast-growing demands for cloud-based technologies in the UK. Recognising the need for SMEs in the region to harness powerful enterprise-level solutions to empower innovation, growth, and agility, Synergi was launched to provide a next generation "born in the cloud" technology partner.

Looking for support on designing, building, and deploying an automation solution?
Our highly skilled and experienced team are helping businesses across the UK with the technology strategies detailed in this e-book.

Next Steps: 1. Contact us 2. Recieve a free consultation with one of our digital automation experts

synergi

We put the **i** in automation

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Silver Application Development
Silver Cloud Platform
Silver Collaboration and Content
Silver Enterprise Mobility Management
Silver Project and Portfolio Management
Silver Security
Silver Small and Midmarket Cloud Solutions



Premier
Partner