

MITRATECH

The Case For Enterprise Automation

Connecting People, Process, and
Technology When Connection is Key



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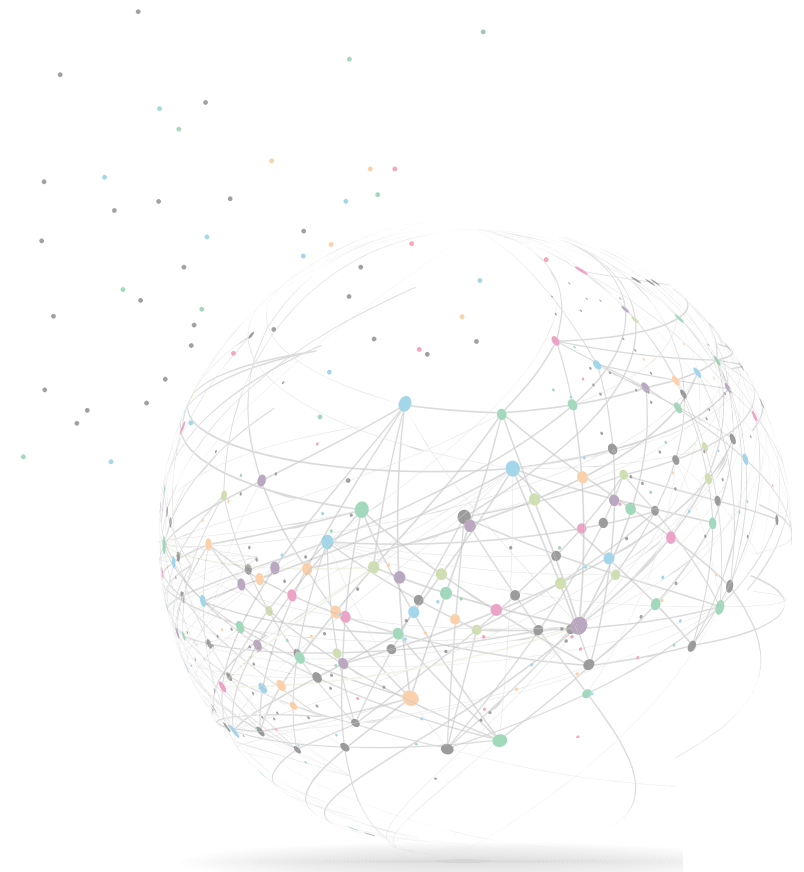
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01 Connecting at Scale

Enterprise Automation connects people, process, and technology to eliminate manual work and place repetitive tasks into work streams that manage themselves.

But enterprise automation is about more than connecting people, process, and technology. Enterprise automation is about connecting people, processes, and technology *at scale*.

Over the past five years, companies have made huge strides in automating their systems. Now, it's time to think about how the individual systems relate to each other globally. We need to centralize our tech stacks but spread out the people who know how to use them. By doing so, we empower the people who are closest to their own pain points, and who have the experience and drive to fix them.



What's needed is a workflow automation solution that empowers anyone and everyone across the business to streamline, standardize, and improve their processes. While an enterprise automation solution is owned centrally, the roll-out of the platform can be democratically dispersed amongst multiple departments so that each process owner sees their process and the technology behind it as part of a larger, company-wide story.

In this eBook, expect to learn how the proper solution can serve your enterprise by bringing together people, processes, and technology in a way that democratizes and disperses responsibility without losing the authority, security, or reliability of a top-notch rollout.

Get ready to learn how, by rolling out an enterprise automation platform across the business, IT teams can centralize their tech stack while also empowering other departments, freeing up their own time, budget, and saving their sanity.

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02 Lifting up your biggest resource: your employees

By giving non-technical employees access to low-code solutions, IT teams soften their grip on the technologies they purchase and gain the opportunity to focus on the bigger picture: making sure that technology works for everyone, and that everyone is using the same platforms to streamline their work.

There's a lesson to be drawn from the world of landscape architecture here: How there are typically **two philosophies** when it comes to building walking paths on college campuses.



The *first* philosophy consists of a down, expert-managed approach: looking at the blueprints for a quad and determining the shortest or most beautiful paths across it. While the *second* philosophy is more *laissez-faire*: when Michigan State, for example, erects a new building, they **do not pave paths** between it and its surroundings.

The landscapers there allow students, staff, and faculty to walk wherever they want, and then, after a “desire path” forms, they pave over the path with asphalt to make it the authoritative way to go.

The same applies in IT. Each time a user travels off a “main road”, they leave an indelible mark behind. When IT starts to see their users in the same way that landscape architects began to see pedestrians, they can empower those users to pave their own roads by giving them the latitude to automate enterprise processes around their own needs, rather than forcing them down paths that are unsuitable for them.



03 When should IT empower others?

How can IT professionals determine when it's time to empower others, and when they should take control?

Well, it depends. If your implementation requires complex integrations and constant contact with your database, you're probably looking at an IT integration. But if you have a simple process that you could imagine describing in a flowchart, it may be a good opportunity for your own citizen developers.



Delegate to citizen developers when:

- You need a process that ensures all of your vendors are compliant with your regulations
- You want to build out e-Signature approval processes, such as Business Travel Request or NDAs
- You are ready to set up an automated chain of events for policy exception requests
- You need to set up an approval process for independent contractor agreements

Bring in IT when:

- You need to implement a vendor management system for your internal team up to date on vendor actions
- You need to consolidate the e-Signature system that your whole company uses
- You're ready to set up a platform that manages all of your companies policies
- Your organization is ready to upgrade its human resources management system



04 Discerning which processes should be automated

Automation can be ambiguous: there is value in the “weak ties” that we build when we buy a cup of coffee in person instead of through an app. Not all processes must be automated in order to work best.

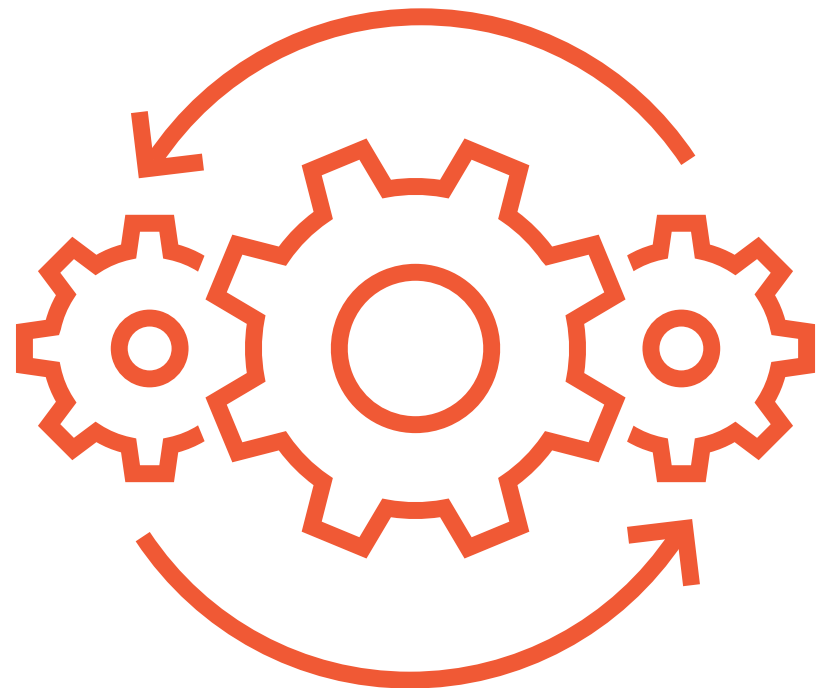
But processes in the workplace are different. And the ones we don’t realize are processes? They end up taking longer, exposing more risk, and, at the end of the day, making our lives a little bit worse.

Every signed document, for example, is part of a larger story: approvals are almost always involved, and before approvals discussion, and before collaboration someone’s request. Often, these processes don’t feel like larger stories because we just see ourselves touch one part of them, usually through our email inbox.

Every signed document...
is part of a larger story.

One of the most important steps a company takes when it embraces digital transformation and enterprise automation is to begin seeing processes for what they are, and to begin seeing tasks and outputs as part of larger processes.

Digital transformation as a watchword asks us to think beyond outdated solutions and pieces that aren't already conceived of as processes. It demands that we zoom out and look at the bigger picture: how the various pieces that touch us and our work touch each other. It's time to see tasks as part of a larger story, and it's time for transformational technology to empower departments and companies to begin writing the stories themselves.



What to be on the lookout for when you decide to automate:

- High volume and repetitive tasks with predictable variations
- Email approval chains
- Data that is tracked in spreadsheets
- Continuous effort like reminders, follow ups, and escalations
- Checklist-driven
- Data that evades you and requires persistence
- An audit trail requirement
- Next steps are based on predetermined criteria

Best practices for enterprise automation transformation

So what do business leaders need to keep in mind?

- Making sure that whenever there is a manual process that can be automated, that it gets automated.
- Making sure that whenever an employee has an idea for improving a process, that he or she is empowered to improve it.
- Making sure that even a platform owned by IT can be dispersed across different departments, and that those departments feel empowered by them.



05 Validating new technology against changing needs

When looking for an enterprise workflow platform that will work for every department, from HR to Legal, from Procurement to Sales, it's important to validate the following:

- **Ease of use:** Make sure you are looking at platforms that are built for self-service. Can a user design and publish workflows for any process without any code, IT or developer involvement?
- **Cross functional adaptability:** Your tool should be the center hub that brings together processes across multiple functions and departments. Have you found one SaaS process automation tool to rule them all?
- **Flexibility and scalability:** Your processes change quickly, so your technology needs to as well. Does your process empower users to take on agile methodology? Does it enable iterative design and implementation?
- **Comprehensive integrations:** If your enterprise platform can't integrate seamlessly with anything that has an API, swipe left. You are working across the enterprise: you need to be able to configure custom integrations or integrate smoothly with major software applications, including a robust set of advanced REST API and eSign integrations.
- **Reporting and analytics:** If your enterprise workflow platform is not reporting on the processes it claims to make more efficient, it is going to end up being even more work. You need a tool that provides easy access to reports in a variety of formats, providing one-click visibility and transparency across your whole organization.

06 The benefits of enterprise workflow automation

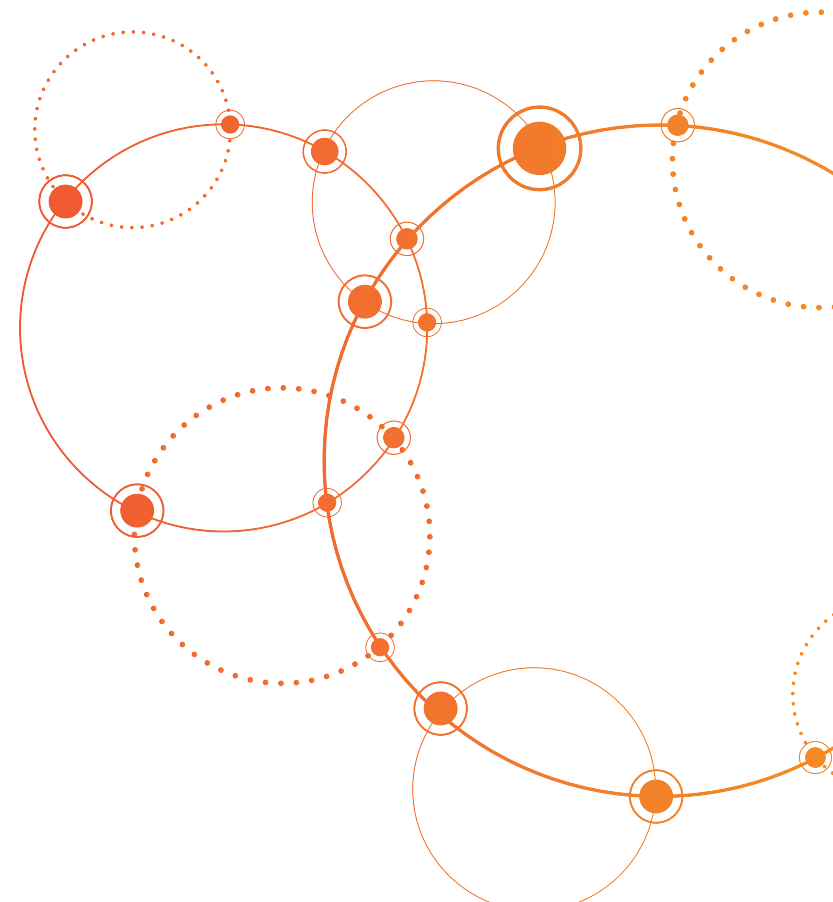
Once your enterprise workflow automation platform is set up, watch the benefits roll in:

- **Immediate ROI:** The right platform will provide immediate access to the entire set of tools needed for intuitive, drag-and-drop workflow automation and process transformation.
- **Lower Total Cost of Investment:** Reduce your TCI thanks to no infrastructure requirements, predictable pricing, and the ability to embed risk and compliance best practices within processes.
- **Centralization and collaboration:** Gain global access to centralized documents, workflow statuses, and analytics with real-time collaboration. The winning platform should have permissions so that no one sees anything other than what they need to see, but everything that they should.
- **Engaged employees:** A tool that encourages citizen developers to take the reins is one that will drive employee engagement and keep your teams feeling empowered. There are two goals here: to show employees that they can help improve processes, and to use those improved processes to free up their time for higher value work.
- **Airtight compliance:** With a workflow tool that works across the enterprise, your teams track and monitor every transaction across all workflow, with a single source of truth and audit trails.
- **Adaptive mindsets:** When the next crisis hits (and the one thing we know is that another crisis always hits), your workflow automation platform should give you confidence that you will be able to take in new information and easily pivot. Workflow automation is cool in the face of crisis: those who wield it know that a simple drag and drop is all that stands between them and an improved process that meets future needs.

07 Conclusion

In the final analysis, the new automation tools that are available to the modern enterprise give that organization a tremendous opportunity to improve performance and efficiency, and accomplish much more work with the same resources.

And central to that is how low-code/no-code workflow automation solutions can put that power in the hands of the organization's more crucial asset: its own employees. By giving them the ability to contribute their own expertise in doing their jobs to the process of crafting processes, everyone benefits.



About Mitratesch

Mitratesch is a proven global technology partner for corporate legal, risk & compliance, and HR professionals seeking to maximize productivity, control expense, and mitigate risk by deepening operational alignment, increasing visibility, and spurring collaboration across their organization.

With Mitratesch's proven portfolio of end-to-end solutions, organizations worldwide are able to implement best practices and standardize processes across all lines of business to manage risk and ensure business continuity.

Mitratesch serves over 1,500 organizations worldwide, including 30% of the Fortune 500 and over 500,000 users in 160 countries.

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