ULTIMATE GUIDE TO AN EASY PROCESS AUTOMATION WITH NO-CODE AND LOW-CODE WORKFLOWS

INDEX

PROCESS AUTOMATION: THE SOLUTION TO EVERYTHING?

Manual processes are still an integral part of many organizations. However, performing a large portion of your daily administrative tasks manually not only wastes time and money, but also puts your customer satisfaction at risk. This is where process automation comes in: With the goal of significantly accelerating repetitive processes through a software tool and removing them from human labor, business process automation refers to optimizations using digital technologies. Most companies today receive their data from a variety of systems, making it difficult to keep track of everything. An additional automation tool provides you with a comprehensive set of capabilities to map, manage, and automate all your organization's processes across systems.

Automation does not have to be expensive or complicated: With no-code and low-code technologies, you can digitize and automate your processes quickly, cost-effectively, and without extensive IT knowledge. Sound promising? Then read on! In this whitepaper, we will show you why automation is so important as a driver of successful growth, how to take the first step in bringing automation to your business, and how to create digital workflows with just a few clicks to save valuable time.

PANDEMIC DRIVES AUTOMATION

A culture of automation is of great importance in the digital age to ensure that companies remain competitive in the long term. Because one thing is certain: effective process automation enables a company to do significantly more work with the same number of employees, increases its competitiveness and thus ensures its survival on the market in the long term.

The Covid pandemic significantly accelerated the use of automated processes: According to a survey by Workato, in which nearly 700 medium to large companies from various industries participated, one-third of them were using automated processes in five or more departments in 2021. This compares to 15% in 2020. In order to satisfy important stakeholders such as customers or applicants in uncertain times, customer support teams in particular relied on automated and thus scalable as well as error-free key processes. Before the pandemic, only one department in the company had automated its processes,but now many more have done so - and the trend is rising. This is because automation allows companies to focus on their most important priorities, significantly improving employee productivity and customer experience.

NUMBER OF DEPARTMENTS AUTOMATING THEIR PROCESSES
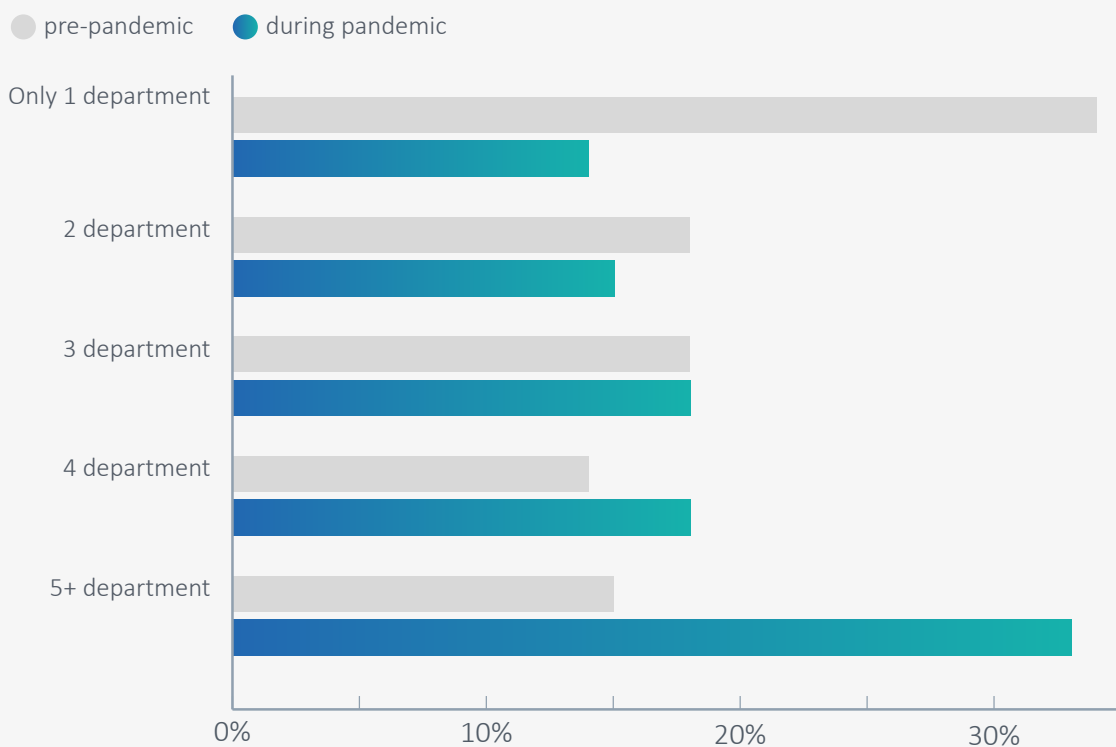
Source: Workato Work Automation Index, 2021

THESE ARE THE ADVANTAGES OF AUTOMATION

Businesses and employees benefit from automated business processes that drive growth and revolutionize the way people work. Running simple processes without human intervention significantly reduces manual errors. New demands are also placed on the workforce: training for an automation tool and more varied tasks make their own workplace much more attractive and boost motivation. Cost savings are passed on to consumers or increase the company's profit margin. Companies that embrace automation take their performance to a whole new level:

- Higher customer satisfaction
- Reduced time and workload
- Increased compliance
- Reduced costs
- Higher agility
- Reduced processing errors
- Stronger employee bonds and satisfaction
- Improved product and service quality

Gartner predicts that by 2024, companies can reduce their operating costs by 30% by combining automation technologies with redesigned operations.

5 FACTS: ARE YOU READY TO AUTOMATE?

Are you ready to start automating, but not sure which process is right for you? Here are five key criteria to help you identify the right process to start automating:

1. MANUAL ACTIVITIES ARE THE ORDER OF THE DAY NUAL ACTIVITIES ARE THE ORDER OF THE DAY

Do you have simple, manually performed activities? Then you have already discovered the first processes that are ripe for automation. Repetitive tasks, often perceived by employees as boring routines, can be eliminated through process automation. Not only does this help the business, but it also frees up employees' time for more important tasks. Long-running processes that require time-consuming manual processing and are therefore prone to error also offer enormous potential for automation.

2. THE WORKFLOW IS CLEAR

Standardized processes are a prerequisite for automation. Trying to automate an unstructured process will not be successful. Rule-based and standardized processes with defined workflows are ideal candidates for initial automation because they vary little or not at all and an automation tool can follow clear instructions. If the process flow is constantly changing or there are no clear decision criteria, the process is less suitable for automation.

3. FORMS ALREADY EXIST

If you already use forms for processes such as travel reimbursement, there is further potential for automation, whether the form is paper or digital. The important thing is that the needed data to complete the request is already taken into account. With an automation tool, you can add many features to your forms that are not possible in a paper or PDF form, such as drop-down fields, date and time fields, or options for attachments. The software can then automatically fill in common fields, saving you a lot of work.

RESPONSIBILITIES ARE OFTEN UNDEFINED UNDEFINED

When you manage a process manually, it can be difficult to define responsibility for each step and assign it to a specific person. As a result, the blame for late tasks is often shifted to others. In an automated workflow, however, each task is assigned to a specific person-and it is clear to everyone who is oing what. Questions about process ownership and manual task management become obsolete.

5. TRACKING - MISSING?

To ensure that a process runs smoothly, you need to be able to clearly define responsibilities and track the status of each process. With manual processes, this can be difficult, especially if you are still using paper invoices. With an automated workflow system, you can always see where a task is in a process with just a few clicks. This saves a tremendous amount of time that otherwise would be spent on tedious searches, discussions, and coordination.

NO-CODE AND LOW-CODE: WHAT IS THE DIFFERENCE?

Companies often lack the necessary IT resources to implement discovered digitalization potential. No-code and low-code platforms are therefore increasingly in demand, as users can digitalize their processes in the shortest possible time at low cost and without extensive programming knowledge. The key features of the two technologies are as follows: No-code platforms are aimed at business users, often referred to as citizen developers, and typically have a simple visual user interface. This means that even non-technical users can create their own applications and processes - often using drag-and-drop functionality - without writing a single line of code. The clearer the interface, the easier and faster it is for business users to get up to speed. Low-code platforms go beyond the no-code approach and are intended for more complex applications that require manual input and at least some IT skills. Scripting capabilities make it possible to quickly implement custom workflow solutions for demanding digitization projects. However, a combination of visual interfaces and coding sections provides developers with good guidance and keeps the programming effort low. Gartner predicts: „By 2024, low-code application development will account for more than 65% of application development activity."
Conclusion: Identify the simplest, most standardized processes that are already mature but still have room for improvement in terms of communication, accountability, and tracking. Then you will have the best foundation to start automating.

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Conclusion: Identify the simplest possible, standardized processes that are already well matured but still have potential for optimization in terms of communication, accountability, and tracking. Then you have an optimal basis for getting started with automation.

FIRST STEPS TO PROCESS AUTOMATION: HOW TO START?

You have recognized the advantages of process automation and would like to try it out? Let us show you how to get started and what you need to consider in the early stages:

1. IDENTIFY OPPORTUNITIES FOR AUTOMATION

The first question to ask is which processes should even be considered for process automation. In fact, some processes are more appropriate than others. As explained above, one-off, situational processes tend to be less suitable because the potential of process automation cannot be fully exploited, and the cost-benefit ratio would not be balanced. As a result, well-defined, repetitive processes are predestined for automation. A company's central core processes are particularly suitable because they must be performed as quickly and accurately as possible. The following questions can help you identify the processes you want to automate:

- Which processes are repeated frequently in the company?
- Which processes are similar due to their consistent flow?
- Which processes are core to my business?

Typical examples include document review and approval, responding to service requests, onboarding processes, vacation requests, invoice processing, and quoting. Processes can originate from a variety of areas and departments.

2. COLLECT INFORMATION ABOUT THE MANUAL PROCESS

Now that you have selected the first processes for process automation, it is important to collect information and data about the process that has not yet been automated. The future automated process should consider all necessary information. This typically includes questions such as

- What are the steps in the manual process?
- How long does the process take on average?
- What IT systems are used in the process?
- Which IT systems are used within the process?
- What data is created and processed as part of the process?

It can be helpful to talk directly to those involved in the

process, as this will give you first-hand experience of how the process typically works. Finally, there is another critical question: What are the problems and inefficiencies in the current processes? This is the only way to solve these problems in the future. In addition, you need this kind of control data to later compare the output of the manual process with that of the automated process. This will allow you to evaluate exactly how much you have saved by automating the process.

3. SELECT THE RIGHT AUTOMATION TOOL

USE CASES FOR PROCESS AUTOMATION

Onboarding new employees

Procurement process

Vacation request

Event planning
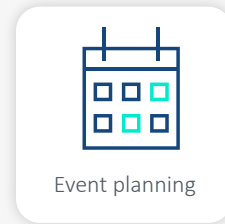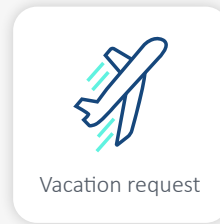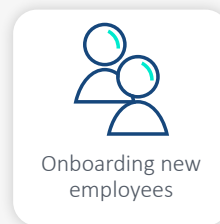
To ensure the success of process automation in the future, the next step is to choose the right automation tool for your needs. Make sure you choose a tool that is easy to understand and intuitive to use - after all, many of your users will have little or no experience with such automation tools. It is also helpful to choose a tool that does not require an unnecessary amount of IT resources, as these are often scarce and heavily tied up in organizations. Some vendors are already reducing these resources to a minimum with no-code and low-code workflows. This is because these types of workflows require little programming and can be easily operated by users outside the IT department. In addition, select vendors offer a jump-start to process automation through predefined process templates for different departments and use cases.

These can serve as templates that can be customized to meet your needs. Ideally, the automation tool also integrates process modeling capabilities, so you have both in one tool. As a result, process customization can be directly modeled and adapted for process automation. If you want to integrate data from other tools, the automation software should also be able to easily import data from third-party systems such as SAP®, Microsoft Dynamics®, Salesforce®, or Microsoft Office®.

4. DEFINE AND MODEL THE OPTIMAL (AUTOMATED) PROCESS

The next step is to define and model the new process for automation. This should include proposed solutions to earlier problems in the new process and re-engineering of the process if necessary. Ideally, the process should be modeled in the internationally recognized BPMN 2.0 modeling language, as it is understood by most users and is considered the standard in many parts of the world. When modeling, make sure that no process step is left out and that the entire process flow is mapped.

5. TEST THE PROCESS AUTOMATION AND GO LIVE

Is the process to be automated in place and have you made all the necessary preparations? If so, you may want to thoroughly evaluate the workflow automation before going live. This is your last chance to find and fix bugs. You should also get the people involved on board and trained early on. Especially if they will be using the new automation solution a lot. Show them how the tool works and the areas they will encounter. Clarify any questions that may arise and accept feedback. Make your employees aware of the benefits of process automation and allay their fears of negative consequences. This will make it easier for them to adopt the tool. Once these steps have been successfully completed, the automated process is ready to go live.

6. MONITOR AND MEASURE KPIS

You have done it! Your first processes are automated. But that is not the end of the story. Now you need to monitor the performance of the process automation and adjust the processes as needed. Check to see if the processes are achieving their goals and where there are still problems. You may discover bottlenecks and backward loops that you did not think of or were not aware of before.

7. MAINTAIN AUTOMATION ACTIVITIES

This last step is often overlooked and underestimated because automation is not a one-time project. Over time, processes will change, systems will be replaced, and new automation needs will arise. In addition, new processes are sure to appear that lend themselves to workflow automation and promise savings. Think of process automation as a continuous process. Again, good is not good enough!

THE FAST TRACK TO AUTO-MATING YOUR PROCESSES

Improve the quality and performance of your business: With an automation tool, you can quickly transform your manual, paper-based, and repetitive activities into digital forms, executable workflows, and bot-automated tasks.

WITH PROCESS TEMPLATES TO EXECUTABLE PROCESSES IN NO TIME AT ALL

Submitting vacation requests, preparing for employee onboarding, reviewing order requests - sounds like a lot of bureaucratic, time-consuming work? It does not have to be! With pre-built process templates, you can automate your HR, finance, purchasing, or support processes in no time - no matter what industry you are in. Simply select the right template, customize it to your needs, and you are ready to automate your first processes. No matter how complex your process is or what department it belongs to: Any process can be automated.

A REAL-LIFE EXAMPLE: HOW EASY IT IS TO AUTOMATE A VACATION REQUEST

Vacation request processes are an integral part of everyday business. However, if they have to be laboriously processed manually, everyone involved quickly becomes frustrated - because they simply waste too much time. Paper-based leave requests quickly lead to unnecessary administrative overhead and often non-compliance due to unplanned absences. With BIC Process Execution, you collect all requests in a single location, making it easy to keep track of due dates, approvals and processes. By automating and expediting absence requests, you minimize errors. To make your processes even more efficient, you can also define your own automation rules. This way, all processes - for example, the request for vacation and the notification for approval - run automatically and according to your individual needs.

AND THAT'S HOW IT WORKS:

Before you can automate your vacation request process, you first need to document it, for example in the form of a BPMN model.

OVERVIEW OF PROCESS TEMPLATES

| | | | | | | Revise Sales Contract | Order Placing | Customer Feedback | Grant Management Application | Monthly Campaign Review |

Set Up Employment Contract | Invoice Processing | Office Safety Inspection | Managing IT Requests | Costumer Feedback Collection | Invoice Approval Workflow | Cloud Software Updating | Contract Redlining | Create Proposal

IT Support Ticket Handling | Quote Request Processing | Request Paid Time Off | Expense Reporting | Create Press Release | Manage Job Postings | GDPR Audit | Report Approval | COVID-19 Visitor Tracing

Facility Issue Management | Payroll And Expense Reporting | Campaign Planning | Legal Document Checking | Inventory Management | Purchase Order Handling | Employee Onboarding | Audit Planning | Equipement Request Handling

Close Yearly Accounts | Vendor Approval | Purchase Order Request Handling | Payroll Adjustment | Crisis Communications Planning | Requesting Parental Leave | Churn Prevention | Document Approval | IT Services Request Handling

Work From Home Approval | Sales Pitch Planing | Business Case Preparation | Maintenance Request Handling | Performance Review | Human Resource Development Management | Continous Improvement Process | Invoice Receipt Handling | Temporary Contract Extension

With BIC, you can model your workflows quickly and easily with an intuitive user interface and extensive modeling support. Documenting your workflows lays the foundation for automation and allows you to realize the true potential of your processes.

GBTEC's process templates are already available here as BPMN models. With the Process Template for Leave Requests, you get an appropriately modeled process that you can immediately use for execution. This saves you modeling effort up front and allows you to easily add customizations to the process, such as company-specific documents or risks and controls, by simply dragging and dropping. With BIC Process
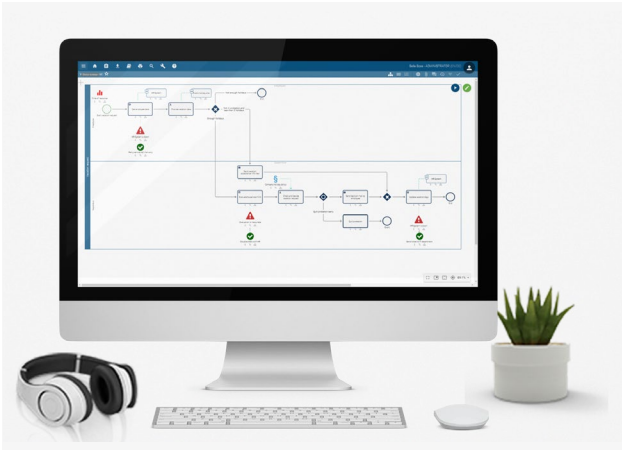

Execution, you can then automate your process based on no-code and low-code workflows. The tool transforms your process model directly into an executable workflow without any programming, which you can extend with digital forms, automated emails, and bots. Already have your processes modeled in another tool? No problem - you can easily connect BIC Process Execution to other process modeling tools. Your executable workflows are stored as Process Apps - from
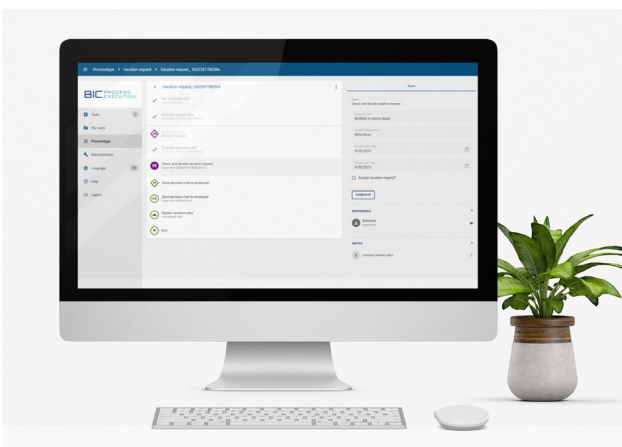
here you can easily launch the process and create an unlimited number of processes. The workflow is triggered automatically and all participants, whether humans, IT systems or software bots, are guided through the process step-by-step using a digital and interactive checklist. At any time, you can see where the process is and who is working on it. As soon as a new task comes up, you are automatically notified by email.

Thanks to the mobile, cloud-based application, you can complete your tasks not only on your PC, but also on your laptop, tablet, or smartphone. This makes it easy for you to track and monitor your processes on the go. Regardless of your industry or role in the company, you can save valuable time with automated leave request templates and rely on BIC Process Execution as a tool to help your employees do their best for your company by working more efficiently.

THE ADVANTAGES OF BIC PRO-CESS EXECUTION EASY START
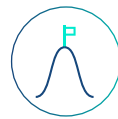
EASY START
Use our extensive repertoire of process templates and automate your first process in minutes.

CONSERVE RESOURCES
Let software bots manage repetitive tasks and save valuable time otherwise spent on manual, tedious tasks.
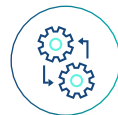
NO CODE
Easily customize forms, email notifications, and workflows to meet your unique needs without the help of IT.

EFFECTIVE MANAGEMENT
Stay on top of everything, automate task management, and eliminate wasted resources and misallocations.

FLEXIBLE CHANGES
Customize workflows in seconds with simple drag-and-drop functionality and update employee and team schedules faster and more reliably.

FREQUENTLY ASKED QUESTIONS. BUT...

... IS PROCESS AUTOMATION EXPENSIVE?

There are expensive and inexpensive options depending on the scope and software selection. Many software vendors charge per user. This allows you to get started inexpensively while automating an unlimited number of processes. There are also open-source platforms that are available for free. However, these require technical expertise or external support to fully utilize the software. The cost of process automation is therefore unique to each organization.

... DO I THEN NEED A NEW SOFTWARE PLATFORM?

The outstanding advantage of a new, comprehensive software platform is that it can combine multiple systems. In this way, it brings together a wide range of information for your workflows and documents it in a consistent manner. As a result, processes can be optimized and automated faster and more efficiently. With a new software platform, you can achieve process automation while getting the most value out of your current software.

... DO EMPLOYEES THINK LESS WHEN IT COMES TO AUTOMATED PROCESSES?

No, it is a multifaceted opportunity for employees to build new skills and grow. Intelligent automation frees people from routine tasks so they can focus on more creative, profitable work. This frees up your employees to focus on the things that matter like thinking strategically, working creatively, and responding to customer needs or expanding services.

...DO I NEED PROGRAMMING KNOWLEDGE FOR PROCESS AUTOMATION?

Thanks to no-code and low-code technologies, you no longer need extensive programming skills to automate processes. In fact, all you need is a clear understanding of how the process should work. This means you can customize your processes, forms, email notifications, and system embeddings without having to worry about programming.

... DOES PROCESS AUTOMATION THEN REPLACE JOBS?

Some employees associate process automation with job loss. Process automation means reducing manual work, but at the same time it creates new roles and responsibilities. The impetus for implementing process automation should not be to replace people, but to redesign and adapt workflows. The goal is to create an optimal interaction between intelligent process automation and skilled employees.

... IS MY COMPANY TOO SMALL FOR PROCESS AUTOMATION?

No business is too small for process automation. Where there are workflows, there are processes that can be automated. For small businesses, process automation has many benefits: Reducing manual activities frees up resources. Employees can take on more meaningful tasks that previously took up less of their time. In this way, an investment in automation tools can strengthen small businesses and give them a competitive edge.

WITH BIC PLATFORM TO DIGITAL TRANSFORMATION

The digital transformation is becoming increasingly relevant in organizations of all kinds. With BIC you decide for an innovative process management, intelligent process automation, first-class process mining and thus secure a decisive competitive advantage.

ALL BIC MODULES AT A GLANCE

MODELING & ANALYSIS

BIC Process Design

EXECUTION & AUTOMATION

BIC Process Execution
BIC GRC

MEASURING & MONITORING

BIC Process Mining

With BIC GRC, you can successfully automate your governance, risk, and compliance management.
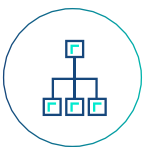
BIC PROCESS DESIGN
Easy process modeling, comprehensive process analysis and publication in seconds with BIC Process Design.

BIC PROCESS EXECUTION
Based on a powerful zero code workflow engine, processes are automated directly from simple process maps.

BIC GRC
With BIC GRC, you can successfully automate your governance, risk, and compliance management.

BIC PROCESS MINING
With BIC Process Mining, you can visualize, measure, and analyze your business processes using real process data.

MAXIMUM EFFICIENCY THANKS TO SIMPLE PROCESS AUTOMATION

From process modeling to automation and monitoring, with BIC you choose an innovative, all-in-one suite for your entire business. Rely on competitive technologies, state-of-the-art design, and powerful features to transform your business processes directly into executable processes without programming. Uncover the full potential of your optimized process models and achieve significant progress in your company's digital transformation. Get the most out of your processes and stay successful with the BIC Platform.

Accelerate your business processes with BIC today and use your valuable time for the important tasks instead of manual processes.

DIGITAL TRANSFORMATION LIFECYCLE

WANT TO KNOW MORE?

You want to learn more about Process Automation with BIC Platform? Contact us by phone or email or simply participate in one of our numerous and free webinars!

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E-Mail	sales@gbtec.de

DISCOVER BIC PROCESS EXECUTION

GBTEC GROUP

At GBTEC, we believe that the alignment of operational management with risk-conscious actions is the foundation for successful business management. That is why we are committed to turning these processes into real value drivers for our customers. We achieve this with our state-of-the-art BPM and GRC Suite BIC platform, qualified consulting, and a comprehensive range of training courses. Our products and services help companies in all industries master their digital transformation, business process management initiatives and GRC management. Our teams in six locations in Europe and Australia work every day to ensure that global Fortune 500 companies, mid-sized businesses and public administrations benefit from best practices and innovative GRC management.

For more information, please visit https://www.gbtec.com/.