



Putting the Power of Business Automation into the Hands of Your Business Managers

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Process used and survey demographics

The survey results quoted in this report are taken from the AIIM Industry Watch titled “Paper Free in 2016: Are we there yet?”. Responses were collected from individual members of the AIIM community using a web-based tool. Invitations to take the survey were sent via email to a selection of AIIM’s 190,000+ registered individuals.



About AIIM

AIIM has been an advocate and supporter of information professionals for nearly 70 years. The association mission is to ensure that information professionals understand the current and future challenges of managing information assets in an era of social, mobile, cloud and big data. AIIM builds on a strong heritage of research and member service. Today, AIIM is a global, non-profit organization that provides independent research, education and certification programs to information professionals. AIIM represents the entire information management community: practitioners, technology suppliers, integrators and consultants. AIIM runs training programs, which can be found at <http://www.aiim.org/Training>.



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Bob Larrivee is Vice President of Market Intelligence at AIIM, and an internationally recognized subject matter expert and thought leader with over thirty years of experience in the fields of information and process management. Bob is an avid techie with a focus on process improvement, and the application of advanced technologies to enhance and automate business operations.

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Introduction

Increasingly there is demand for business organizations to have structure and visibility into their client facing processes. Considerations must be in place to enhance the overall customer experience and be more agile in their approach to working with and addressing customer needs. This means that the power to make business decisions should be placed in the hands of the business managers, as should the power to change the way the business processes support these business needs. What we are talking about here is the rise of the citizen developer, when it comes to process change and automation. Placing the power to change, in the hands of those who most need it when the need arises.

This paper presents the challenges and benefits of placing that power in the hands of the business unit, and how that provides the flexibility, agility, and security business organizations need to increase operational efficiency, and responsiveness.



Business Challenges

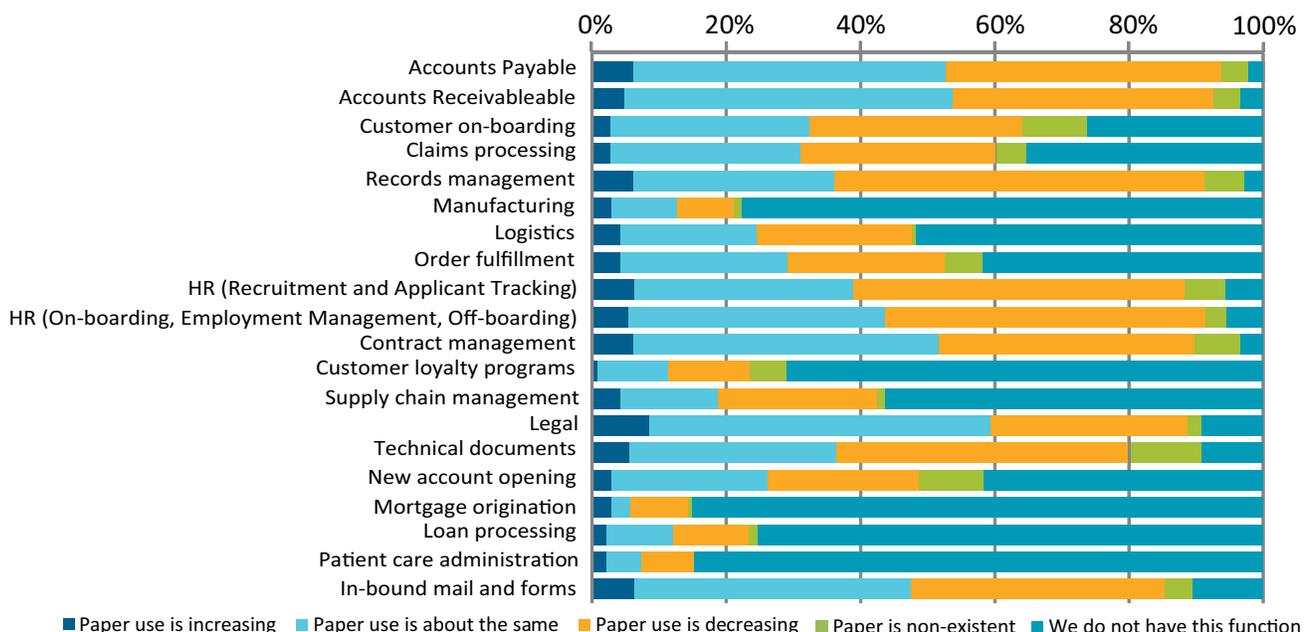
Regardless of the focus of your business, many have overlapping challenges within their organizations. When you breakdown the organization, public or private, similar opportunities begin to surface in each area. For purposes of this discussion, let's focus on the following:

- **Human Resources**
- **Client engagement**
- **Contract management**
- **Enabling and accelerating innovation**

Human Resources

Employee on-boarding is an everyday process for large organizations. It is somewhat surprising that for many, this process is still very manual and paper intensive, rather than automated. Typically, while it is not limited to this example, onboarding includes collection and processing of information about the new hire. This could be a document related to administrative forms—such as employment applications, direct deposit, and benefits elections. AIIM Research finds that while the impression that paper is increasing in this area, substantial paper reductions seen in HR for recruitment (49%) and the employee lifecycle overall (48%)¹ as shown in *Figure 1*.

Figure 1. In which of the following departments is paper increasing?



Client engagement

Client engagement requires organizations to have structure and visibility into their client engagement processes. The client engagement process should include online interactions that securely capture important information tied to automated processes that in turn, generate acknowledgement messages, notify internal personnel of actions required, and store key documentation in relevant folders. AIIM research finds that 64% of our respondents, say process analytics and reporting are considered mandatory while 62% say the same of alerts and notifications.² The indication here being one of recognition that businesses are actively moving to provide an extended infrastructure enabling greater engagement and interaction beyond the corporate walls.

Contract Management

From the time an initial contract is discussed, until it is executed and the record can be legally destroyed, contracts must be managed properly and efficiently. For many organizations, this is all too often a tedious, and paper based activity. This is where organizations can look to eliminate the paper and use workflow to bring this process online, ensuring timelines are met, while reducing administrative activities and controlling human error with document creation included as a step in the workflow. Think about how fast and efficient a contract review process would be without paper and the ability to review and approve the contract while even using mobile devices. This means that a "stuck-in-process" scenario would be detrimental to business success. AIIM research finds that 58% of organizations are trying to solve their stuck-in-process issues to become more responsive and decrease review and approval times.²

Enabling and accelerating innovation

Innovation is much talked about with few really taking steps to support and enable it. While we often think it is freeform, innovation actually benefits and thrives when there is structure in place, managing the process from idea generation, all the way through to launch. There is also a growing realization that designing, automating, and refining operational processes enables business organizations to explore new types of innovation and instill creativity in relation to business process options, rather simply trying to enhance and support their current ways-of-working. Innovation requires collaboration – not siloed activities – and as such, must allow interaction within and external to the organization. This means there must be a means to capture and share information quickly and readily that is not only stored, but also becomes a trigger for the internal innovation processes. AIIM research finds that 66% of respondents say these have improved remote work capabilities while 51% cite improved collaboration.²



Conclusions and Recommendations

Growing demand for more flexibility and agility in business operations requires fundamental changes in where the power is placed to make appropriate changes to the supporting business processes. This means breaking from the traditional method of developing and deploying workflows to a more simplified approach that enables business unit managers to adapt the way they work to meet the immediate need. In essence the organization needs to place the power of change into the hands of the business unit, using simplified technologies and enabling them to become citizen developers. In fact, AIIM research reveals user defined process mapping and modification is the top requirement for 51% of respondents.²

Recommendations

- Document a process and where paper enters your business and processes.
- Identify who is in charge of radical process review and seek endorsement for policies on paper-free processes.
- Do not limit your possibilities to be within the corporate walls. Look for ways to extend capture, access and engage activities beyond the corporate walls using mobile and cloud applications.
- Determine where the decision and power to change the process is best managed.
- Provide the technology and training to enable the business unit to design and modify their processes – on their own.
- Promote successes where digital information and processes are being used within your organization.

References:

¹ AIIM Industry Watch ““Paper Free in 2016: Are we there yet?”

² AIIM Industry Watch ““Process Improvement and Automation in 2016: A look at BPM”

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Business Process Enablement

About FlowForma

FlowForma, the leading provider of Business Process Management (BPM) tools for Microsoft Office 365[®] has been revolutionizing the traditional BPM space with an innovative approach to developing award winning BPM products that empower users to create and streamline processes smarter and faster, utilizing the familiar SharePoint platform, without any coding.

FlowForma is a Microsoft Partner, with over 60 customers and 75,000 users across Europe, South Africa and North America. The company is headquartered in Dublin with offices in London and Lithuania and is motivated by its values to innovate, evolve and achieve with employees, customers and partners.

Sample customers include Lipman Produce, Pernod Ricard, the NHS, Primark and AON.

About FlowForma BPM for Office 365

An award-winning Microsoft Office 365 Add-In, FlowForma BPM enables business users and Heads of Departments to quickly implement processes such as HR on-boarding, new product development and clinical trials as well as many others, increasing organizational efficiency and productivity.

FlowForma BPM is a proven business process enablement tool. Built for business power users, it enables organizations to seamlessly build out online processes. From the simple every day to the more complex processes, FlowForma BPM permits its customers to drive business process efficiency simply and intuitively.

With features such as document generation, conversion and business rules, FlowForma provides an end-to-end solution that incorporates data capture, business logic and document assembly as an output for business processes. The product integrates directly with your Microsoft SharePoint or Office 365 environment to leverage all the benefits that this powerful collaboration platform provides, including document management, lists, views, and Power BI.

FlowForma BPM is designed to be configured by the people who understand your business need. Business consultants, power users, business analysts are all examples of people who use our Flow Designer tool to quickly create complete solutions on the SharePoint platform.

Dedicated to making the complex simple, FlowForma BPM has simplified the InfoPath forms migration challenge for clients, by developing a unique InfoPath migration tool. This tool enables users to accelerate the migration of business process steps and fields to the FlowForma BPM environment.

For further information, visit www.flowforma.com



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