Workflow Hero’s Line of Business
Conversation Guide
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Workflow automation can power your business and drive your success. Automate your time-consuming, manual processes and create streamlined workflows in every department of your organization. Connecting processes with all of your employees, wherever they work, and all of your content, wherever it lives, can yield huge benefits. You’ll save time, cut costs, ensure compliance, increase accuracy and avoid headaches.

Every automated process simplifies the workplace, saves money, boosts compliance, maximizes your employees’ time, increases accuracy and eliminates headaches. How much more could you accomplish if you could quickly automate your processes?

Chances are, if you’re reading this, you already agree that workflow automation can help. However, you may need to find partners within your organization to help you get started, either from a need justification or budgetary standpoint. With this in mind, we’ve created this conversation guide to help you get project ideas as well as identify and seek out potential partners in workflow.

This guide includes a summary of the various departments found in most organizations.

We’ve provided a summary of the department and some samples of the ad hoc, everyday processes that could benefit from workflow automation. You can use the ideas below to start conversations and spread ideas.
HUMAN RESOURCES

The HR department has one of the broadest reaches in any organization, boasting a high volume of processes and company-wide policies that touch everyone in the business. Hire and departures as well as governance and compliance are both high-impact, high risk areas that must be closely governed.

EMPLOYEE ON/OFF BOARDING

Onboarding new employees is often a time-consuming process involving multiple steps, including approving salaries, signing contracts, provisioning IT systems and training new hires. Companies that streamline this process are more likely to secure the best candidates, and ensure that new employees are operational and effective as quickly as possible. Likewise, you can easily automate the employee offboarding process.

Benefits Realized
• Faster start time from point of offer
• Reduced risk of losing a prospective employee to a competitive offer
• Increased candidate satisfaction
• Reduced time and costs associated with onboarding and offboarding

ANNUAL PERFORMANCE REVIEWS

Performance reviews can be a time-consuming and onerous process for both employees and managers. Managers must follow up with team members to get reviews in on time and file them securely. Employees must remember when reviews are due, fill in complex templates and send attachments by email. Automating the review process gives everyone increased visibility of review status. With Nintex Mobile, employees can complete reviews from anywhere, any time, using simple browser-based or mobile forms.

Benefits Realized
• Faster completion of reviews
• Guaranteed compliance with corporate and HR policies
• Easy tracking of progress
• Complete visibility into all aspects of the review cycle
• Auto notification of steps completed in review process
• Automatic, secure filing of documents

TRAVEL REQUESTS

As organizations grow, more employees submit travel requests, and this challenges HR’s time and resources. Who is handling executive travel vs. sales team travel? Who is handling domestic vs. international travel? Human resources may struggle with tracking requests and with ensuring that all levels of the organization abide by its travel policies. By automating this process, human resources gains better visibility into why employees are traveling, which documents they’ve submitted, who has reviewed what, and when travel requests can be closed as complete.

Benefits Realized
• Streamlined process that can involve multiple stakeholders
• Guaranteed compliance with corporate and HR policies
• Easy tracking of progress
• Visibility into steps followed and stakeholders involved in travel request process
The Administration and Operations department offers a great opportunity to automate repeated tasks, which are often taken for granted, but cannot be allowed to fail. Regular tasks such as contract management or scheduled maintenance and outages form the backbone of many organizations.

**PROCUREMENT AND WORK ORDER APPROVALS**

In procurement, it’s critical to get supplies and parts to your factory at the right time for product manufacturing. Depending on the scale of the purchase, it can be time-consuming to route paper approvals involving layers of approvers throughout the organization. By automating this procurement process, you gain better visibility into the status of approvals and you can better expedite the most time-sensitive purchase orders.

**Benefits Realized**

- Reduced human error in data input for procurement/work order approvals
- Expedited work order approvals that were once manual
- Improved transaction accuracy and increased information sharing
- Guaranteed compliance
- Easy tracking of progress
- Visibility into procurement/work order process

**BANK LOAN APPROVALS**

The approval and processing of mortgage applications involves multiple steps and multiple stakeholders, including the loan processing team, escrow, the buyer, real estate agents and sellers. The process can take weeks. The reams of documents and amount of data involved can make for a tedious, cumbersome process. With workflow automation, you can process mortgages and other loan applications faster, and gain visibility into loan approvals status, resulting in more satisfied bank customers.

**Benefits Realized**

- Unification of a disparate set of systems used for loan processing
- Digitalization of what is often a manual export of Excel data to approve loans
- Elimination of delays in reviewing and approving loan applications
- Increased productivity
- Improved customer service

**FIELD DATA GATHERING**

Engineering processes often involve large-scale projects in industries such as construction and mining. During such projects, remote field workers collect large amounts of critically important data. Costly delays can result if you’re processing this information by paper or fax communication, or if the wrong data is brought back from the field. By automating remote field data gathering, companies can avoid repeat field visits and unexpected project delays.

**Benefits Realized**

- Decreased costs associated with staffing and equipment
- Ability to re-deploy field worker time to field data analysis
- Improved data quality and accuracy
- Streamlined field finding request processes
Accuracy and visibility of data is of the highest importance in the Finance department and, when information is spread across the business in multiple locations, integration of that data becomes key. Being able to tie your finance-relevant data and information into a single, dependable solution is critical for processes like expense reporting, accounts receivable, and many others.

**EXPENSE APPROVALS**

When employees submit their expenses for their manager to approve and for the accounting team to process, they often feel like they lose visibility of what happens next in the process. Their biggest question is when they’ll be reimbursed for their expenses. A more predictable and efficient process can benefit everyone. By automating the expense approval process, you eliminate version control problems caused by spreadsheets floating from one department to another.

**Benefits Realized**

- More predictable, efficient process
- Reduction in incorrect data inputted for expense approvals
- Expedited expense approvals
- Improved employee satisfaction because of faster response times
- Guaranteed compliance with company policies.

**PRE-TRADE CLEARANCE**

Banks and securities firms have had to set stricter internal process controls before allowing stock trades for customers to be activated. As part of Section 302 of the Sarbanes-Oxley Act, the Securities and Exchange Commission occasionally audits small and large securities exchange firms to ensure that they are following SEC rules and regulations, and not making illegal stock trades. Automating that process can expedite customer trades, ensure legal compliance and satisfy the firm's customers by providing efficient trading.

**Benefits Realized**

- Reduced human error in data input for trade transactions and approvals
- Expedited securities approvals that once left a difficult-to-track paper trail
- Increased customer satisfaction, with faster responses to trade requests
- Guaranteed compliance with SEC policies
- Increased visibility and control

**INVOICE PROCESSING**

Invoices need to be processed quickly and accurately so that companies are paid in a timely manner for goods and services. Manual processes can result in delayed company cashflows and payments. By automating this process, stakeholders involved in the invoice development and approval process can approve invoices using automatic notifications and accurately input data into each invoice. Invoices can move through the approval process without a paper trail from desk to desk.

**Benefits Realized**

- Reduced time and cost in invoice processing
- Increased productivity for employees
- Common online environment for staff and employees
- Reduced human error in data input for invoices
SALES AND MARKETING

Speed and effectiveness of communications makes or breaks a sale. Being able to correctly target your opportunities and follow them up at the right time with the right message is what makes revenue grow. RFPs and other sales queries need to be responded to with quality proposals and leads need to be logged and followed up quickly and effectively.

SALES OPPORTUNITY MANAGEMENT

When a company generates hundreds of sales leads in a year, it’s important that the sales team follows up on sales leads and doesn’t miss any leads. By automating the sales opportunity management process, sales teams can collaborate from wherever they are, with auto notifications letting them know when to make follow-up calls, provide sales proposals, approve fee exceptions and issue invoices.

Benefits Realized

- Standard sales site layout
- Required sales security requirements
- Automated lead follow-up notifications to account representatives

MARKETING CAMPAIGN MANAGEMENT

Managing marketing campaigns from campaign inception to final requires coordinating multiple approval layers and multiple stakeholders, such as brand management, market research, sales, supply chain management, warehouses, advertising, PR, and media agencies. By automating many aspects of the marketing campaign development such as press releases or digital marketing assets, consumer packaging design and copy, marketing managers can avoid versioning issues and obtain necessary approvals through automated requests to the stakeholders.

Benefits Realized

- Get to market faster with marketing campaigns
- Visibility into approval process
- Ability for approvers to comment on draft marketing assets via mobile devices
- Access assets via third-party document repositories, such as Dropbox

SALES ACCOUNT PROVISIONING

When the sales team acquires a new customer or a prospect, it’s important for all the teams involved in taking care of the customer to provide a consistent and positive experience. Automating the provisioning process means that these teams, including invoice processing, sales and contract renewals, are automatically notified of the steps to follow with a customer.

Benefits Realized

- Faster processing of customer sales
- Consistent customer experience
- Auto-notification of departments for sales follow up activities
- Improved customer satisfaction
High volumes of simple but crucial tasks often occupy time that could be spent on more specialized work that makes better use of the department’s expertise. Helpdesk administration and the assignment of network permissions are two areas that benefit greatly from automation.

**IT HELP DESK SERVICE REQUESTS**

Productivity in an organization is significantly impacted when employees face a technology challenge, whether it’s a desktop OS issue or a network connection problem. The success of an IT help desk is frequently measured by the speed and quality of its service request management. Automating help desk service requests, including the escalation of requests to appropriate parties, can help the IT team deliver optimal service to the lines of business.

**Benefits Realized**
- Faster processing of help desk requests
- Customized reports
- Better user experience
- Easy escalation
- Improved insights into user feedback
- LazyApproval for on-the-go updates

**USER ACCOUNT PROVISIONING**

Whether an employee is onboarding or offboarding at a company, the IT team follows a standard set of steps to provision or de-provision a user with a company network account. Automating this process can speed up the set-up or deletion of user accounts for employees who are joining or leaving an organization.

**Benefits Realized**
- More efficient account provisioning
- Faster troubleshooting processing
- Automatic notification to users for first-level troubleshooting
- Faster onboarding of new employees

**SHAREPOINT SITE COLLECTION MANAGEMENT**

Multiple employees from various lines of business in an organization request that IT build and manage SharePoint sites. SharePoint administrators must efficiently prioritize these requests, resource the SharePoint servers and manage the associated workflows. Automating the SharePoint site process is an efficient way to manage site collection.

**Benefits Realized**
- Faster site collection management
- Satisfied end users
- Visibility into site collection request processes
- Improved SharePoint administration
- More efficient management of user permissions
**EXPANDED SECTION ON IT STAKEHOLDERS**

We've included an expanded section on the IT department to help you identify and address concerns of the different types of stakeholders that need to be identified early in the process to ensure that concerns are addressed. Achieving buy-in of these stakeholders early will ensure a smooth transition to workflow automation.

<table>
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<tr>
<th>STAKEHOLDER</th>
<th>RISKS IF NOT ON BOARD</th>
<th>HOW TO GAIN BUY-IN</th>
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| SharePoint Administrator | • Rejects the value proposition of Nintex  
• Sees Nintex as a threat to their control of the system  
• Will not help install the WSP packages and install the Features | The good news here is that typically this is one of the first influencers of the software being evaluated. Keeping the SharePoint Administrator stakeholders on-board throughout the cycle will help accelerate the procurement process. |
| SharePoint Developer  | • Prefer to custom develop  
• Will not help drive adoption of the Nintex system if they are not on-board | Promote that this will make their lives a lot easier and will increase the amount of value they can add to the end-users, in term increasing their reputation to deliver value to the organization. |
| Infrastructure Team  | • Refuses to install Nintex due to security claims etc.  
• Will not expose server farm information and server names for licensing purposes  
• Delays installation of software due to database creation permissions, this is not an issue if the SharePoint Farm Account has permissions as per the original SharePoint installation (DB Creator) | Explaining that Nintex is a simple WSP package with feature activation will alleviate most infrastructure teams from risk mitigation mode. |
| Project Sponsor      | • Budget has not been allocated correctly to procure software  
• Sees add-ons as custom development which could slow down the project  
• Rejects idea of add-on software as software vendor and services vendor are not the same | Promote the risk mitigation aspects of leveraging a workflow platform such as Nintex. This will greatly reduce the re-work of changes to the project scope and will also reduce the initial time of development by an average of 1/5 the time of custom development. |
| Procurement          | • Can only purchase through a specific vendor, creating conflict with the VAR/LAR involved with the purchase  
• Signatures have not been lined up for purchase, causing delay in the project | Identify the procurement cycle in your organization early. Show them the urgency of the project and the potential loss of company revenue due to delays in the procurement cycle. Check your Workflow Hero Kit for purchase justification statements you can use with your Procurement department. |