



Workflow Automation Transforming Chaos to Clarity

Table of Contents

Introduction	3
What is Workflow	4
Workflow Standardizes Processes	5
Workflow Transforms Data	5
Workflow Executes Logic	6
Workflow Guides User Experience	7
Workflow Increases Efficiency	8
Workflow Offers Visibility	9
Workflow Drives Compliance	9
Workflow Fosters Compliance	10
Conclusion	11



Introduction

Do you have dysfunctional and fragmented processes that are dragging down the effectiveness of your organization? Would you know if you did? Sometimes operating in the norm blinds us to the operational changes that should be made to remain relevant, modern, and competitive.

Workflow is the backbone for navigating the complexities of business, the nuances of regulation, and minimizing growing costs. Even the best processes and most innovative technology solutions will fail to optimize your operations if the underlying workflow and point solutions are in conflict. Workflow automation is designed for process-centric organizations committed to maximizing efficiencies, accountability, profitability, and most importantly the customer experience.

Implementing a flexible workflow automation platform accelerates time to market for strategic changes now that lay the foundation for changes in the future, all while reducing the costs of getting there.



What is Workflow?

Workflow is often considered an “**intelligent process**” because it alters or automates the steps of a process based on information received from a single source or multiple sources. All businesses utilize processes in their day to day operations. Those processes become part of workflow as data based decisions are incorporated creating a relationship between the steps within the processes and data. Workflow now takes a process that was focused on a particular end and transforms it into **dynamically coordinated interactions** which drive controls and efficiencies until one of many possible end points is reached.

Workflow is defined as a systematic distribution of tasks, information, and documents to users or groups for action based on a predefined set of business rules.

Imagine the possibilities when you **transform** your manual processes into an automated workflow solution. Now that you have a clear definition of workflow, let’s talk about how automated workflow can elevate your business processes to the next level.

Did you know?



of all occupations have at least



of its activities that are technically automatable.¹

Workflow Standardizes Processes



As we mentioned earlier, all businesses utilize processes. With automation, business processes are transformed into workflow by breaking down and clearly defining each action in the process. When the process is executed, the steps performed and decisions made during the process are no longer subjective. Your business knowledge is captured within the business rules. Workflow has standardized your processes and provided consistent and repetitive execution. Everyone completes the same tasks in the same way eliminating the risks of an employee leaving the organization that has critical subject matter expertise that is not documented anywhere but in their head. This frees your teams up to do the thinking and decision making they are good at.

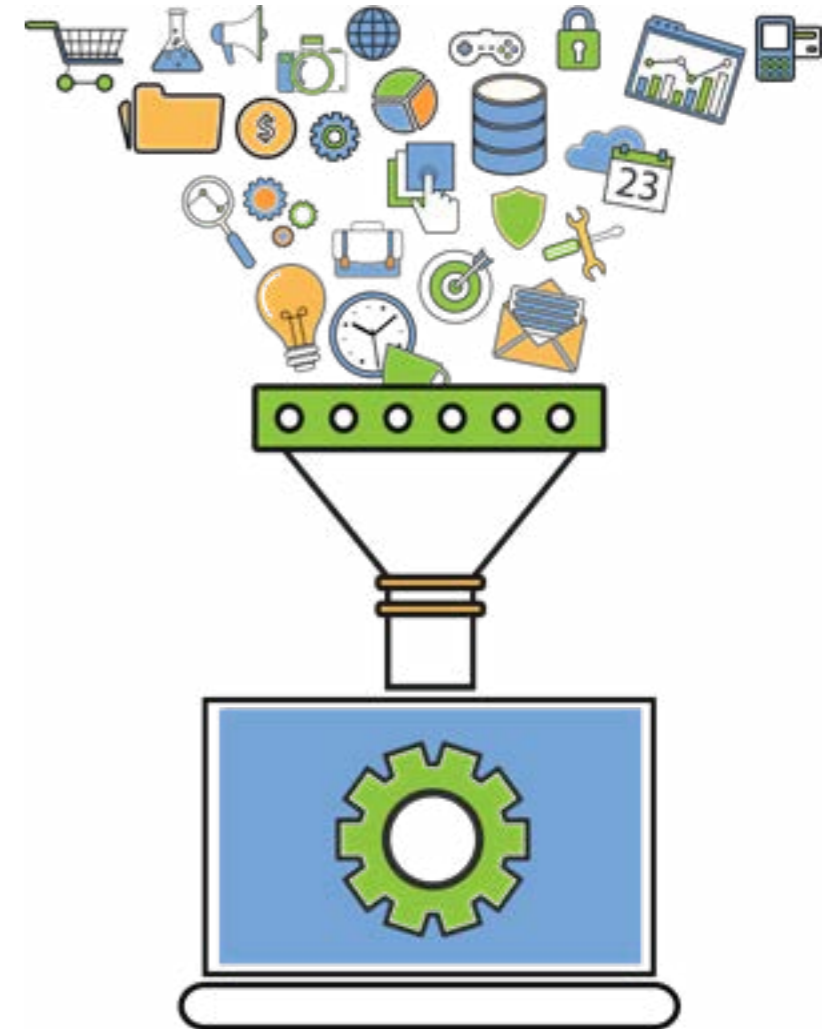
Workflow Transforms Data

Data powers workflow. It's more than letters and numbers entered in a system. Data also includes items such as images, documents, and notes. It has been estimated that about 50 percent of the time spent in the finance and insurance industries is dedicated to collecting and processing data. Whether the data is entered manually or is imported from a third party application, workflow is designed to collect all data related to a process and transform it into actionable information.

According to Forrester, 42% of service agents are unable to efficiently resolve customer issues due to disconnected systems, archaic user interfaces, and multiple point applications.² Workflow's ability to centralize all types of data empowers users to transact business fully armed with all relevant information.

¹<http://www.mckinsey.com/global-themes/employment-and-growth/technology-jobs-and-the-future-of-work>

²<http://www.housingwire.com/blogs/5-closing-call/post/31314-customer-experience-statistics-you-need-to-know>



Did you know?



50% time spent in insurance and finance industries is in collecting and processing data.¹

Workflow Increases Efficiency

Efficiency is a measure of how well an organization performs an action or group of actions with minimal resources. The goal is to successfully deliver products or services cost effectively without sacrificing quality. Workflow's repetitive nature provides organizational consistency, reduces human error, decreases risk of missed steps, and eliminates unnecessary redundancy.

Smart workflow applications “bring order and auditability to chaotic, unstructured, interdependent and extended processes that are currently executed primarily via email, spreadsheets, and meetings.”³ Workflow helps in identifying and excluding unnecessary steps, fostering the ability to be customer centric, forecast, and balance workload by automating tasks that people no longer have to touch. Looking at end to end workflows and identifying opportunities doesn't just make people more efficient, but also more productive and better at their jobs. The result is increasing your company's operational efficiency, freeing up resources for other tasks.

³Smart Process Apps: The Next Breakout Business Advantage by Jonathan Sapir and Peter Fingar



Workflow Offers Visibility

Workflow provides an unobstructed view into the operational status of an organization for all levels within the business. Employees can quickly view tasks within their pipeline, supervisors can monitor departmental workload, and executives can identify organizational trends. With the average end-to-end process involving over 20 different roles, both internal and external sharing and collaborating information, complete lifecycle visibility helps companies identify potential problems, streamline operations, and highlight efficiencies.⁴



The visibility provided by workflow keeps all team members involved and informed. Information from the workflow, such as actions and tasks, can be consolidated into smart work queues to manage workload and highlight inefficiencies. Offering visibility into ineffective processes within an organization, adjustments can be made that allow the business to be proactive versus reactive.

⁴Business Innovation in the Cloud, Stikeleather and Fingar

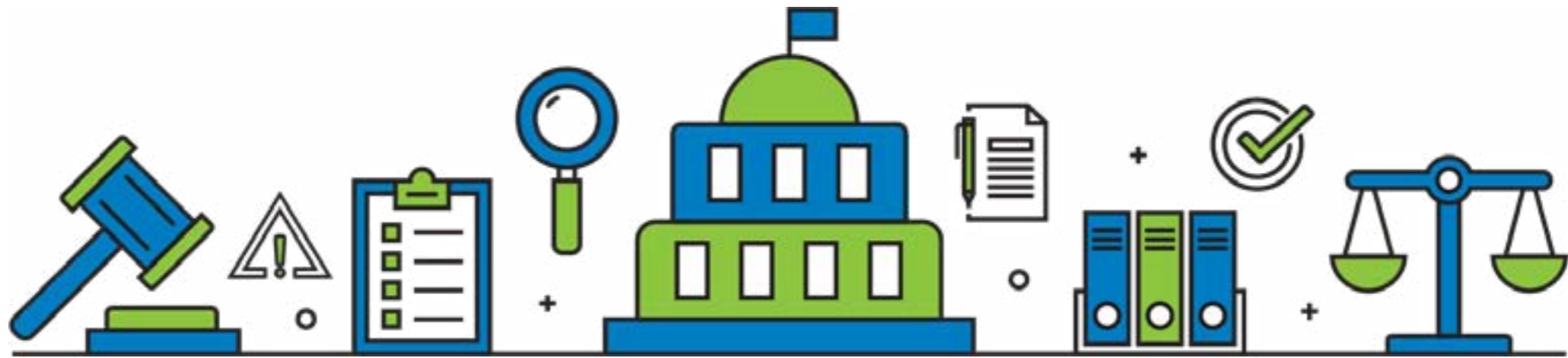
Did you know?

20



Average Number of Roles
in an End-to-End Process

Workflow Drives Compliance



With the level of regulatory scrutiny occurring within various industries, evolving regulations are a continuous challenge for many organizations. Businesses are overburdened with the increased time, costs, and risks associated in keeping up with the changes. Workflow augments the intersection of regulation and technology by driving governance and implementing controls. Changes can be implemented by the lines of business across the organization quickly, and then changed again when needed, thanks to the flexibility provided by workflow and its business rules engine. Workflow gives you the ability to control your regulatory input, data and reporting across the organization.

Did you know?

In 2017, federal regulations cost Americans \$1.9 trillion.⁵

Did you know?

There were over 3,000 regulatory rules issued in 2017.⁵

Workflow Fosters Accountability

Audit trails create a detailed log of all activities that occurred within a workflow. They present a comprehensive view into the preceding actions and events that led up to the current status. With every action having a deadline date, performance-based objectives can be reached and violations can be detected before it's too late. All actions within the workflow can be accounted for, retained, and ready for audit at any time.

In addition to audit trails, managers also have visibility into productivity stats. These views incentivize employees to increase their throughput. With increased transparency and auditability, workflow holds departments and employees responsible that the proper steps have been executed. This ensures compliance with regulatory and company policy have occurred throughout.



CLARIFIRE Workflow



Workflow links processes and add controls enterprise-wide, filling the gaps between point solutions, ineffective processes, and systems of record. With just the click of a button, the interactive UI continues to change and display actionable data. Adding the versatility you need to enable competitive speed to market, including the ability to exponentially improve process execution. Your organization can change as rapidly as needed. CLARIFIRE is easy to use, easy to change.

Create operational efficiencies by transforming your technology strategy. Flexible workflow will help keep your customers front and center while increasing profit margins and reducing overhead.



11399 16th Court North, Suite 100
St. Petersburg, Florida 33716
Phone: 727.507.3440
Toll Free: 866.222.3370
www.eClarifire.com