

[www.flowforma.com](http://www.flowforma.com)

**FlowForma**<sup>®</sup>  
Empowering Process Automation

eBook

# Digital Process Automation Tactics & Success

An eBook featuring answers to the most commonly asked questions about digital process automation

**A collaboration by:**

**Kevin Craine**  
Technology Analyst  
Everyday MBA

**Paul Stone**  
Product Strategist  
FlowForma



# Introduction

Hi there

For those of you who may not know me, I'm a business writer and podcaster and I'm pleased to be collaborating with Paul Stone, Product Strategist at FlowForma on this eBook.

There is a lot of excitement about Digital Process Automation (DPA) these days, and for good reason. It brings the promise of relieving the burden of paper in everyday workflow and freeing people up from having to perform repetitive, mundane and manual tasks that slow business pace.

A new approach to process automation is emerging, where users, front line workers and process owners are in control, giving those that are most familiar with the process, the ability to automate and improve processes without much or even any coding or IT support.

For businesses that have struggled with technology in the past, that is a big promise. But how do you get started?

I'm passionate about sharing my knowledge of DPA, which may be why I was named #1 enterprise content management influencer to follow on Twitter. DPA requires more than a tweet to explore in-depth and I'm pleased to be collaborating with Paul Stone, Product Strategist at FlowForma on this eBook.

Over the following pages, I'll be putting some of the most frequently asked questions about Digital Process Automation to Paul and together we will explore the digital techniques that give process owners and frontline workers the ability to automate and improve processes without the need for IT support or custom programming.

Ok, let's jump right in...

**Kevin Craine**  
Technology Analyst  
Everyday MBA



# What Is Digital Process Automation?

**There's lot of different definitions and acronyms in the world of automation, so for those of you reading who may not be steeped in technology, I wanted to begin my interview with Paul, by asking him for an explanation of why Digital Process Automation (DPA) is different from what has come before.**

*"In the past you'd think of business process management systems, which were built by IT solution providers, providing task management on critical processes. Now think of Digital Process Automation as managing not just tasks, but data and documents too, configured by business process owners themselves. Process automation allows you to digitize on a large scale without running into problems of high cost IT providers and the delays that can occur during that process."* explains Paul.

This is the key point: process automation empowers process owners to take control without a large IT team or custom coding. This is really the innovative part of the DPA approach.

Paul says that rather than being a task for IT, DPA will *"empower business process owners, those who actually know the business needs.*

*Then the Business Manager has a responsibility to manage those processes in the company, empowering these individuals themselves so they can drive efficiencies, without having to go through a third party."*

When going through a third party there is always going to be some type of misunderstanding or delay as your priority may not be someone else's priority. Take control, digitize yourself and get the results you want and need.

***" Take control, digitize yourself and get the results you want! "***

---

Kevin Craine, Everyday MBA

# How Are Organizations Using DPA?

**With IT no longer part of the picture, I wanted to understand in the ways in which organizations are currently applying process automation and how it is improving their performance.**

Paul explains that the largest need he has noticed, has been the need to remove paper based processes.

In every organization there are many unorganized paper based processes that are buried in email chains and spreadsheets, that people create in an attempt of management.

Paul believes that there's a lot of scope for digitizing those processes and doing them in a controlled environment, where you can measure the efficiency of the process.

*"If you have a process on paper or email there's no way to measure its performance,"* says Paul

There is an awful lot of instances where companies have a traditional BPM system in place, but they've still plenty of processes that they've not got around to, and there's lots of scope for proficiency there, opportunity for proficiency that they're actually missing out on.

Paul tells me that he meets many business leaders who are looking to remove old, inefficient, paper based processes so they can gain control over them and drive overall organizational efficiency.

In terms of impact, Paul has noted that businesses using Digital Process Automation programs are looking at a 50% increase in efficiencies on any paper based process that they automate. A no-code Digital Process Automation platform allows businesses to automate processes and reap the benefits very quickly.



# What Is “No-code” App Development And How Does It Differ From “Low-code?”

**With the promise of these efficiencies, I wanted to know whether there really was such a difference between no-code and low-code app development.**

Paul explains that low-code is very common in the marketplace at the moment, but that with low-code, process owners are still dependant on IT assistance.

*“No-code basically means you don’t need to understand coding, you don’t need to be an IT developer, or you don’t need to have to call an IT developer to build out a solution,” says Paul.*

*“You just need to understand the process that you’re trying to work on, and have an understanding of it in a very logical way. Then you can go in and configure a solution rather than coding a solution. It’s a much faster way to get your results and you don’t have to become any kind of IT professional to deliver those results,” states Paul.*

The largest successes are in organizations that use a lot of paper. Paul can confirm this, with construction companies being a classic example.

*“The construction industry is quite far behind in terms of digital transformation. If you visit any construction project, you’ll typically see lots of pieces of paper flying around.*

*This is one industry where we’ve witnessed a lot of benefit from process automation, and the reason is, that you can take all those paper forms and you can quickly turn them into electronic forms,” Paul reveals.*

Paul continues to explain *“electronic forms that are accessible on a mobile device on a construction site allows the form to be filled and then submitted to headquarters automatically, this immediately saves an enormous amount of time, where typically it would have been a paper process.”*



*"On any construction site there are typically a very large number of forms, and by digitizing one on its own, you can make a saving, but the real saving is to be made when you digitize multiple pieces of paper. This is where DPA platforms really come into play because in the space of a couple of days, you can digitize a piece of paper and a process surrounding that."*

Paul suggests that from there, "you can introduce automation, so you can automatically send emails and create interim documents during the process. This really adds up to a lot of savings at the end of the day."

To summarize, in a business where there are multiple paper based processes, you can really benefit from a DPA platform. Many environments which are still paper based in this era of digital transformation, don't have a lot of IT resources, so there is no option to digitize that paper using traditional methods. By introducing a DPA platform, digitization is fast and helps make a lot of savings.

It is now the time in history where we can do these kinds of things, things that we may have been dreaming about previously. I ask Paul if he feels that this is a fundamental shift in the way that we will be doing business going forward and how applications will be designed and deployed now and in the future.

*"Yes, absolutely!", exclaims Paul. "There's just not enough IT people or IT resources around to digitize processes and automate in the way that businesses need to, using traditional methods. As more and more businesses become fully digital, paperless organizations, their competitiveness increases significantly. The effect has snowballed, allowing the early adopters push ahead of their competitors."*

*"This new technology is going to push many industries towards becoming truly digital paperless organizations. It's a method of achieving, if you were dependent on the IT department to digitize for you, you'd be waiting a long time. We're witnessing an acceleration in the marketplace, with more and more companies adopting this kind of DPA approach, the do it yourself approach to their IT solutions," says Paul.*



# How Are Enterprises Bringing Repositories And Systems Together?

**Many enterprise organizations have multiple information repositories and systems, both formal and informal, making it challenging to bring all those pieces together effectively. I ask Paul to describe where he has seen organizations be successful in overcoming that challenge.**

*“When the FlowForma Process Automation tool was originally designed, we linked data, documents and workflow together in one single user interface, so as you move through a workflow, you have the ability to see data related to tasks, documents related to tasks and so on, all in one easy to use interface. It allows you to link multiple systems together through a chain of actions,”* Paul explains.

*“If you imagine there are several people involved in a business process, as each person works on their piece of the process, you pull and push data in and out of your back-end systems, you end up with an auto-trail of the actions that were taken to complete your business process and achieve your business goal.”*

Paul describes FlowForma Process Automation acting as an orchestration layer on top of your systems, that shows the human activity that links transactions together. While still having your back-end

systems, your SAP or ERP system is still going to be there, but you have this layer that governs the human interaction with those systems to achieve those business goals. This is the unification we always hoped for, one repository of all the information in the organization and one source of truth.

Paul suggests that the challenge for businesses is that the source of truth is different, for different types of information. *“You have an ERP system for sorting your client details, then you have a different system to store product details and so on. Imagine having one system that actually talks to each one of those and always references the correct system for your master data, allowing you to link human activity to the actual data that stores the master information.”*

That to me sounds like some secret sauce because our objective is to use information in ways that advances the performance of the organization, not just to save more and more of it. Without that unification and that ability to get to all of it and understand all of it at a holistic level, a strategic level, we’re never quite there yet.

# What's A Common Process For Quick Automation Success?

*"A very common use case for FlowForma Process Automation is onboarding," explains Paul.*

*"Onboarding is a complex process that requires data to be captured accurately by different people. To onboard a supplier, for example, you need the ability to externalize a process and have that supplier enter the data themselves, on their desktop in their own organization. The data is captured accurately and passed to your organization to be processed, usually by several different people before it hits your desk.*

*The onboarding process also requires referencing data stores inside your company to ensure that all the information is captured correctly, especially where other processes are dependent on that information being correct. This is an area that a lot of our clients were interested in implementing and they have seen real benefits," says Paul.*



# Recommended Action Items From Paul Stone



1

Paul suggests that the first thing you need to do in your organization is to look at the processes that you could automate and take a good look at your paper based processes. You want to see where the pain points are in your organization and select some processes, where you could try out Digital Process Automation.

2

Secondly Paul suggests trying out a process automation tool for yourself. It is very easy to get started with a 30 day free trial of FlowForma Process Automation and build a process out for yourself.

3

Finally, measure the results. With FlowForma Process Automation you have the ability to measure digitized processes, to clearly see the exact benefits your digitized process is going to bring you, and gauge when you'll see the benefits in your organization.

## Bonus Tip!!!

In preparation for the next 10 years, CIOs should be thinking about letting the control out to the wider business and providing an infrastructure that allows businesspeople digitize their own processes, where IT help and advise those businesspeople going forward. It's IT putting themselves in a different position where they understand they can't deliver all the IT needs of the business, but support the business in doing some of it themselves.

If you would like a free trial of FlowForma Process Automation, visit [www.flowforma.com/trial](http://www.flowforma.com/trial)

# FlowForma<sup>®</sup>

Empowering Process Automation

## FlowForma HQ

Block E, East Point Business Park  
Dublin 3, Ireland.

(US) +1 (617) 398 4990

(UK) +44 (0)20 3481 1319

(IRL) +353 (0)1 5369 650

[www.flowforma.com](http://www.flowforma.com)

[info@flowforma.com](mailto:info@flowforma.com)