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## **Workflow and Content Automation - The Smart Way Forward**

**Topics:** Digital Business

**Summary:** As the speed of business accelerates, Workflow and Content Automation (WCA) represents the consolidation of traditional workflow and content generation into a new category to support the needs of a Digital Business.

**Issue:** How will enterprises improve their operations and meet customer expectations in our digitally connected world?

### **Executive Summary**

*Visibility. Automation. Management. Analytics.*

In order to successfully compete in today's digital world, enterprises must be able to transform slow, error-prone operations from manual, analog processes to automated ones that include digital workflows and automated document generation. Just as importantly, real-time analytics generated by digital workflows provide critical operational visibility that managers and senior executives need in order to continually improve business results.

Most legacy business applications were built to include analog steps and lack the digital functionality required to more fully automate unstructured tasks involving people, processes, and content. This is the reason we have identified Workflow and Content Automation (WCA) as a key imperative for business success.

WCA solutions offer full toolkits to automate workflows and produce intelligent documents with valuable process analytics that make businesses more productive and intelligent. WCA solutions accelerate how quickly information flows between enterprises, people, and important business systems (like Salesforce, NetSuite, Workday, Box, and SharePoint) to accelerate process cycle times and increase accuracy.

One of the first things enterprises must do to improve business workflow is to identify and migrate away from *paper-*

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*based processes.* Note that processes involving endless email with document attachments are still effectively “paper-based;” while the assets have been lifted-and-shifted to electronic storage, the work itself has barely changed at all.

Enterprises are increasingly leveraging Digital Transaction Management (DTM) to upgrade from paper-based to digital signatures. WCA is complementary and extends DTM to help enterprises more fully automate their entire document flow of creating, routing, and approving any business document, and the associated tasks. This is a critical first step in moving toward a more fully digital business.

WCA is also part of the larger Digital Transformation trend that Aragon has identified as the rise in Digital Business Platforms (DBPs). DBPs are designed to automate all aspects of a business with different areas of business focus. As such, WCA is a critical DBP component, particularly for any applications that involve people, processes, or content.

Workflow and Content Automation also offers business executives real-time visibility into the analytics of how their business is operating. In other words, it offers invaluable ‘application portfolio intelligence’ for leaders to run their business operations more effectively.

WCA can run on-premises or in the cloud, and the best platforms offer hybrid solutions that make it easy to protect important data and safely connect with major cloud ecosystems like Microsoft, Salesforce, and Oracle, to key systems of record, and content repositories.

Concepts and terms:

- Digital Business Platform (DBP)
- Digital Workplace
- Digital Transaction Management (DTM)
- Advanced DTM to be introduced

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## **Workflow and Content Automation – Transformation Unleashed**

Today, many companies rely on unwieldy enterprise software applications that are difficult to configure, maintain, and update as business processes evolve. This results in organizations lacking the ability to quickly execute and react in real-time. Operating an agile business in our competitive era of Digital Transformation requires a different approach.

WCA combines sophisticated workflow capabilities with automated document generation and involves a number of key departures from a traditional Business Process Management (BPM) discipline:

- It is combined with document generation and image parsing features to create a new, must-have set of tools that allow for the creation of, and harvesting data from, intelligent documents that seamlessly move between the enterprise and their customers.
- It spans the boundaries of any one software or storage asset; processes typically involve multiple sources of structured and unstructured content.
- It expects solutions to continually evolve over multiple iterations, and the tools are designed to embrace this reality.
- It strives to reduce the amount of work on the part of both the designer/developer and the participants.
- It strives to reach work participants using the apps, devices, and communication channels they already know, hooking into email, instant messaging, texting, social media channels, Internet of Things devices, and existing websites. A new app for every new solution is not practical.
- It calls on features like digital signatures, faxes, electronic forms, mobile apps, API gateways, etc., as needed. Unlike pure integration platforms, WCA is capable of significantly more elaborate process logic, effectively assigning tasks to software.

By combining these capabilities, WCA opens up the possibilities for automating content-centric processes that require human interaction to conduct business. WCA also enables dynamic

### **Note 1: Defining Workflow and Content Automation.**

Workflow and Content Automation (WCA) is a new category that combines workflow capabilities integrated with Intelligent Document Generation to allow the creation of smart document processes that can be easily analyzed to know what is working well and what needs improvement.

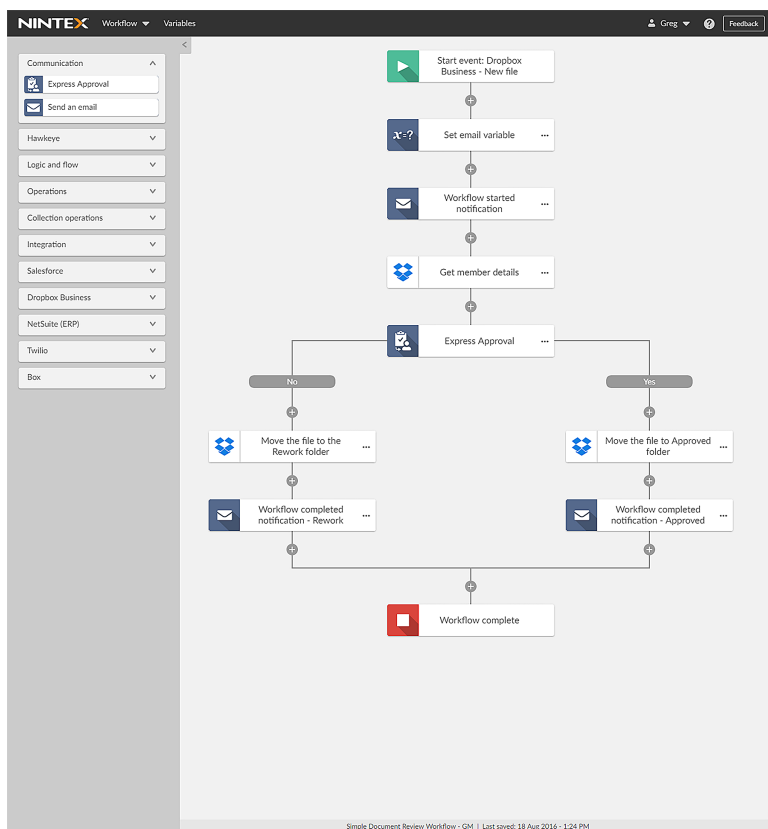
As a Business Application, WCA is designed to be used by business people, and as such, should require minimal to no programming.

WCA is poised to consolidate the legacy technology markets of Business Process Management and Customer Communications Management, which were designed in an era of programmers and manual integration. WCA is a key part of a content-focused Digital Business initiative.

engagement between internal and external constituents, a key tenet of Digital Transformation.

In addition to embracing rapid changes and iterative improvements, the task of creating solutions is meant to be far easier than traditional development. While not required, WCA also strongly encourages the owners of a business problem to participate in the problem's solution, and often build it themselves.

The shift from reliance on programmers for process automation to enabling less technical business professionals to automate their own business processes is a key aspect of the emerging WCA market.



**Figure 1:** Example of the new business-centric nature of WCA (source: Nintex Workflow Cloud – for more information on Nintex, see Note 2).

## WCA and Digital Business

WCA is part of a larger trend in Digital Transformation that Aragon has identified as Digital Business Platforms (see Note 3). Digital

### Note 2: Nintex Overview

Nintex is an award-winning pre-IPO SaaS company that provides advanced Workflow and Content Automation (WCA) capabilities leveraging the **Nintex Workflow Cloud™** platform, **Nintex Drawloop Document Generation**, and **Nintex Hawkeye™**. Document processes can be fully automated and analyzed making Nintex ideal for a number of vertical applications.

**Location:** Bellevue, Washington

**CEO:** John Burton

### Key Offerings:

Nintex, with its 1,600 worldwide partners, is committed to helping customers drive greater business efficiency and effectiveness.

The company delivers a breakthrough capability known as **Workflow as a Service™** to initiate an automated workflow process by a workflow participant, whether connected or mobile, by a dynamic or defined event in any number of related enterprise systems, in hybrid mode or in the cloud. These workflows then execute via the **Nintex Workflow Cloud**, a state-of-the-art architecture that enables the Nintex Workflow platform, the foundation for designing, building, publishing, and automating workflow processes across an enterprise, to be cloud-based.

By combining the Nintex Workflow Cloud with **Nintex Hawkeye**, the first and only analytical capability to provide intelligence about the people, processes, and content used in an enterprise's automated workflow portfolio, business and IT decision makers gain valuable intelligence to fuel business digitally forward.

**Availability:** Available now.

**Website:** [www.nintex.com](http://www.nintex.com)

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Business Platforms (DBPs) are about automating all aspects of a business with different levels of focus.

As such, WCA is positioned as a component of a DBP. For content-centric applications it can be viewed as a *critical component*. Aragon feels that DBP will become a growing category and for content-focused parts of DBP, WCA is one of the key components.

### **WCA and Business Automation**

The revelation for enterprises is the realization that with WCA, the connecting customer facing, front-end processes with diverse back-end operations is now possible. This ability to automate what we refer to as content lifecycle management means that these processes can be automated to a degree that previously was not possible.

### **WCA and Digital Transaction Management**

WCA is a complement and extension to Digital Transaction Management (DTM) capabilities that extends the automation of a document-centric transaction process to the collaboration of the people and interaction with the diverse content involved in a process. DTM is all about moving from paper-based document processes to fully digital ones to enable digital execution of transaction processes. This includes everything from the first mile of approving an internal requisition to the last mile of replacing paper when a business relationship needs to be contractually signed.

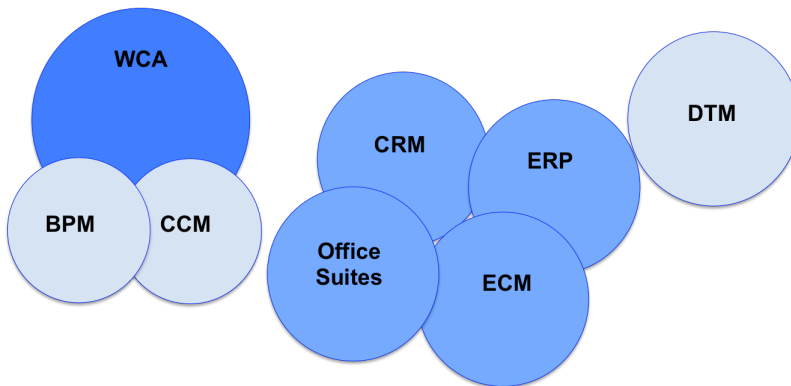
When coupled, WCA and DTM provide the platform to digitally interconnect the people and content in any business process automation before, during, and after a transaction, including all interactions between the participants in a process.

In both WCA and DTM, enterprises strive to migrate away from paper to more fully automate their entire document flow of creating, routing, and approving any business task and related documentation. WCA expands that objective by providing interactive collaboration between process constituents, automating disparate content handling needed for process automation, and documenting the entire process for compliance and accuracy. It is essentially the difference between eliminating

#### **Note 3: Digital Business Platform**

Digital Business Platforms (DBPs) are both a business and an architectural approach to Digital Transformation. DBPs coordinate goal-directed work and support the smooth interaction of people, software, and machines in an intelligent and automated manner.

paperwork and paperthinking. These are the first and essential steps toward a fully Digital Business Platform.



*Workflow and Content Automation (WCA) will consolidate the BPM and CCM markets into a new Business Application category. WCA can run on-premise and in the cloud, with the best platform offering hybrid Solutions to protect data and safely connect to major cloud ecosystems, key systems of record, customer-information, and content repositories.*

**Figure 2:** How WCA Complements DTM.

## Advanced DTM

WCA includes advanced document processes, including, but not limited to, document assembly, routing, integration into other applications, and workflow both upstream and downstream from the decision, approval, or signature. As a result of these advanced capabilities, integrating WCA with DTM establishes an Advanced DTM platform. Examples of this integration is the commercial integration between Nintex Workflow and DocuSign or between Nintex Workflow and Adobe Sign.

Enterprises have many legacy applications in place that can be converted to DTM if the document-related part of the process can be made electronic. Integrating eSignature capabilities into legacy applications is made easier with providers that have open APIs (Application Programming Interfaces) and SDKs (Software Development Kits).

## Predictive Analytics – A Core Capability

“Predictiveness” has emerged as a new and important term and an executive level strategic imperative. Automating process is critical to helping every stakeholder in a business

be more effective. Applications should recognize patterns in human behavior, processes, and real-world events to make relevant recommendations in context. This impact cannot be overlooked. In WCA, telemetry captures the process analytics necessary to then report on process execution, frequency, participants, content utilized, impact, efficiency, and effectiveness. As the base of analytics grows, machine learning can be applied to identify and recommend improvements in process design and execution and to predict outcomes and behavior. The addition of machine learning means that analytics in WCA will ensure that tasks can be accomplished in a “smart” fashion.

Due to the way machine learning currently works, these applications may need some tuning to gain the maximum impact. Predictive Analytics is a key component in WCA and it will help to ensure that outcomes are achieved faster.

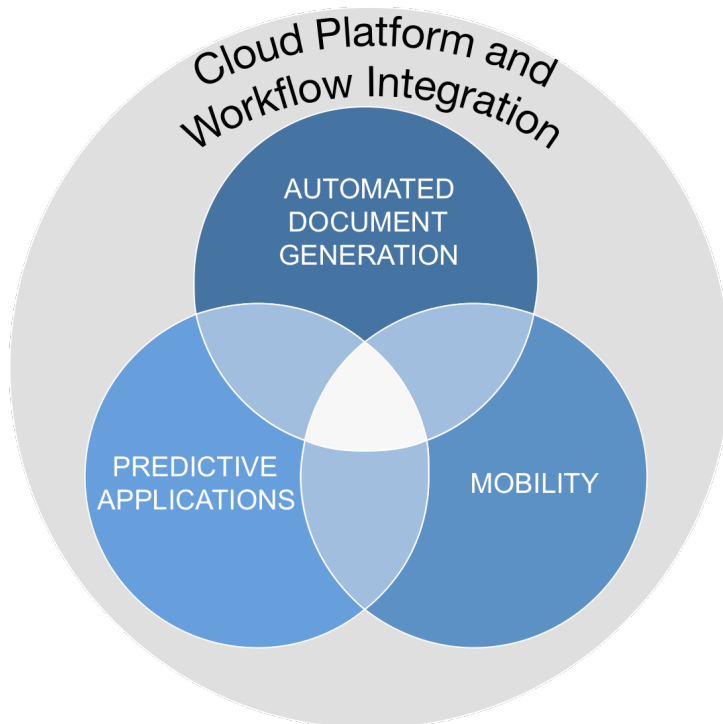
### **Why WCA Now**

The need to leverage WCA is increasing due to competitive business pressures. The dynamic of automating two sets of variables —the process flows and the content associated with them— gives business units more flexibility and more possibilities to get to faster business outcomes. This automation ensures key business process repeatability and compliance once enabled.

This is due to the fact that there is less manual intervention in repeatable processes and that the process executions are automatically tracked. Enterprises will face challenges to how much automation they can achieve relative to document processes. Workflow is one part of that, but when adding document generation as part of a WCA platform, it provides significant time to outcome advantages.

## The Trends that will Drive Digital Business

The idea of a fully digital business is a concept that is advancing beyond the idea phase. Executives are realizing that the more digital they are, the more flexibility they have to execute faster.



**Figure 3:** Key Trends Driving Digital Business.

### Predictive Business Applications

Machine Learning is becoming infused in more and more software applications. As applications become smarter, processes will be able to be created faster because WCA applications will eventually be able to make suggestions based on the process structure and execution.

Enabling a Digital Business means being able to create new digital processes and connect to the content associated with that business transaction easily and rapidly. Increasingly, Machine Learning will be integrated into WCA to allow applications to suggest improvements to processes that need attention or documents that could be generated earlier or faster.

## **Mobility**

Doing business on mobile devices is not a nice-to-have capability anymore. Mobile phones and tablets combined represent the dominant workforce computing platform today and in the future.

But mobility is not so much about devices as it is about having what you need, and the ability to act on it, wherever you are and whenever you need it. It may mean building a new app, but it may also mean appearing in the right places on other apps, or extending the reach of existing apps. It also means leveraging what/where/when you are at all times.

One of the emerging trends in the Content Management market is the shift toward content being shared by mobile apps. The need for mobile apps to be transformative means that Mobile Content Management platforms need to be capable of leveraging their content via APIs. Mobile content dissemination and collection is an inherent necessity.

There is an ebb and flow for all enterprise applications; ECM providers are not immune to this. While many enterprises have multiple ECM Systems, however, not all of them are open and API-enabled. This will change, as the new demands of Digital Business will require that these systems are open and API-enabled. This is the single biggest reason that will force enterprises to find alternatives to their existing provider.

For WCA, integration will be a key enabler; APIs that can be leveraged into a Mobile WCA application will be critical.

## **Automated Document Generation and Interaction**

There are existing categories that focus on content creation, such as Customer Communication Management (CCM) and Configure, Price, Quote (part of Sales Enablement). Increasingly, with machine and deep learning, the ability to assemble a document will get easier.

CCM tools generally only deal with document generation. Workflow and Process means adding more tools. With the advent of WCA, the need for dedicated CCM tools will wane, since WCA will be able to be configured and managed in a more automated fashion by business professionals.

Today, documents are assembled using a set of rules and variables, and this is an effective way to create content. As business is far more dynamic, customers and constituents expect near-immediate response to their document needs, including proposals, consumption reports, sales and account plans, and much more. Moreover, improved customer engagement objectives will require delivery by mobile means. However, the content used for these documents frequently lives in diverse locations such as pricing tables, content management systems, and application content repositories (such as CRM, HRIS, and ERP systems).

The document generation capabilities of WCA will address the aforementioned complexities by identifying and collecting the proper document content and formats, triggering next steps, communicating between diverse systems, creating the document package, obtaining approvals, routing and executing delivery including mobile, linking to DTM systems, and starting, executing, and continuing next steps.

WCA adopters will also have the foundation established for the benefits of Smart Documents. With deep learning modules that are integrated into other applications, Smart Document tools will be capable of assembling a document based on the data at hand and on instructions from the person that needs the content. These tools will also interact with the broader capabilities of document production within WCA.

Similarly, being able to use smart documents as inputs to processes will emerge as useful and necessary. While much attention is paid to transferring data from place to place, much business is conducted in the form of documents, and we expect the gap between business data and business documents to decrease over time.

### **Cloud Platforms and Cross Application Workflow Integration**

The market for cloud-based applications has become a multi-layered one. More apps can now interact with each other, and dedicated “buses” to facilitate this have become less necessary. The ability to build a cloud-based application is easier, particularly because so many IaaS and PaaS providers are offering incentives to do so. The key advantage of leveraging IaaS and PaaS is that enterprises can leverage the investments that the other providers have made.

Today, many business applications are cloud-based and actions taken in those apps, such as CRM, can initiate a WCA process. The new interoperability of Cloud platforms will allow WCA processes to run on and across different clouds. This opens up the flexibility with which to automate business processes.

In the past, applications had to be resident on the same cloud. Now, with application integration (via APIs), WCA processes can be executed that leverage multiple applications. This means that a sales order can be created and routed to a customer and then integrated into the enterprise accounting/billing system.

When we combine all of these trends, we have the perfect storm for market disruption (see Figure 3). Enterprises that harness these trends will most likely go digital faster. Those that automate and start with WCA will have an early, fast mover advantage.

### **Workflow and Content Automation versus Traditional Document Processes**

WCA increasingly means that the old way of hardcoding or programming workflows into apps are a thing of the past. The new focus for IT will be on building mobile experiences that leverage new and changing workflows for their line of business (LOB) partners.

The LOB analyst or specialist needs to be able to quickly build their own WCA capabilities without as much dependence on IT. This also suggests that ease of use of a WCA solution becomes a critical selection criterion.

Figure 4 suggests the old approach versus the new WCA approach that enterprises should evaluate:

Item	Old Approach	WCA Approach
<b>Architecture</b>	Rigid and fixed	Dynamic and flexible
<b>Developer Type</b>	IT Programmer	Business Analyst
<b>Development Approach</b>	Complex Programming	Visual - Drag and drop metaphor
<b>Payback</b>	Months to Years	Weeks
<b>Change Management</b>	Hard to change once deployed	Easy to modify and update
<b>Impact</b>	Isolated	Expansive

*Figure 4: The old versus new approach using WCA.*

### **WCA in the Enterprise**

One of the key aspects of WCA is that it is focused on the needs of the business and as such, is tailored and can be used by business users.

Today in the enterprise, workflows are often static and isolated and tied to specific documents or a limited number of process participants. WCA promises to change that. The flexibility of a modern WCA Platform means that processes can be changed as business needs dictate.

### **WCA as a Business Application**

WCA is a true business application and as such is lightweight, requires little to no programming, and is flexible. It is easy to integrate with other LOB Applications. WCA can identify and access diversified content stored in a content management system, an enterprise file, sync, and share system, and an application of record needed for a workflow application. It both extends and better integrates traditional IT applications while introducing a simpler way to automate human-centric processes. As such, WCA becomes an enterprise-grade capability, empowering the line of business. Due to its ease of use, WCA does not require heavy IT involvement, even though it is a good idea to have IT participation.

Some of the key items to check off when using WCA include:

## **Mobile Activation/Deployment**

Mobile is not optional in 2016 and beyond. WCA capabilities must be able to be leveraged across Mobile Devices (phones, tablets, and wearables). Since many use cases are field-based, where connectivity is not constant, support of native operation for iOS, Android, and Windows is essential.

## **Forms Interaction**

Forms, both on connected and mobile devices, are vital methods for easy interaction with workflow applications by participants. The ability for rapid, interactive forms creation by non-technical users within WCA capabilities is increasingly necessary. Forms will be created and completed more automatically than in the past, in part because of the document generation and auto-field fill-in that is part of WCA.

## **Ensuring Document Generation is Enabled**

Shifting from workflow processes to a fully WCA-enabled process means that document creation needs to be designed in, intuitive, and easy to use. Business Analysts need to work with the business unit to understand the document-based process so that automated document generation can be enabled.

## **Interactions Across Cloud and On-Premises Applications**

One of the major challenges for document-based processes is that most processes exist in silos. Newer cloud-based applications often do not talk to on-premises content repositories. New WCA Platforms must be capable of navigating between different cloud and on-premises applications automatically, transparently, and securely.

## **The Benefits of WCA**

WCA has many benefits to the enterprise. The biggest impact is allowing manual processes to become more automated and digital. The major benefits to focus on include:

- A platform for Digital Transformation
- Increased customer and field engagement
- Shorter sales cycles that lead to faster revenue growth
- Rapid process automation by the line of business (LOB) with lessened demand on IT
- Better agility, driven in part by expanded mobility
- Improved collaboration and constituent connectivity
- Prospective digital workflow to activate IoT and connect it to the business
- Extended integration and value between IT systems of record through WCA connectivity architecture
- Retained governability by IT when needed even if more responsibility has been distributed to “citizen developers”

### **Key WCA Use Cases**

When evaluating WCA, it is important to look at critical assets and processes across the enterprise. The most important departments to look at first are the ones that drive revenue and/or impact customers.

When evaluating the departments and the use cases in each, it is important to look at the constituents involved in a process, the content types (documents, records, forms, etc.), the value in the results of further automating and improving that process (the ROI), and to assess departmental priorities for process automation that have likely not been addressed by IT. Figure 5 helps to identify the high-payback document processes that can be faster to implement:

## Key Processes by Department

Sales	HR	Finance	IT	Legal
Proposal and contract generation, review, and collaboration	Employee recruitment Employee onboarding	Contract management Vendor and contract approvals	Help desk Service provisioning Virtual machine mgmt.	Contract generation, review, collaboration Compliance M&A governance
Quote to cash	Performance Management	Budgeting		
Compensation Management				
Marketing	Facilities	Support	Product Mgmt.	Operations
Collaborative content review	Equipment maintenance	Help desk Field service automation	Acceptance testing Release management	Purchase approval Quality assurance
Lead automation	Safety inspections	Customer complaint management	Beta program management	Resource tracking and management
Customer communication	Incident reports			

**Figure 5:** Key Business Processes Examples by Department (source: Nintex).

Some of these may appear, at first glance, to overlap with transaction management use cases, but the key differentiator is that the focus is not on the work product, but rather the process to produce it and its relationships with other assets (people, data, other content, schedules, communication channels, LOB apps, etc.)

## Examples of WCA Across Industries and Departments

WCA is being put to work on a global basis in multiple industries. Below are several high-impact examples of how WCA is making a difference. In each example, it is worth noting that (a) the implementation timeframe and costs are fractions of a traditional enterprise-level IT system, and (b) the solutions evolved over rapid iterations rather than as a single, formal, top-down development effort.

### Contract Lifecycle Management

When a salesperson wants to close a deal with a prospective client, a contract is needed. By necessity, this is a formal

document, but requires input from several LOB systems and multiple vested parties from both companies.

The paper-based process involved a great deal of opening multiple apps and/or websites, copying/pasting numbers and other content, routing the proposed document around by email, and manually incorporating multiple copies, each with a different reviewer's changes, into a series of successive proposals until one was accepted. Manual records were then kept as part of the final agreement.

A sample WCA-revised process:

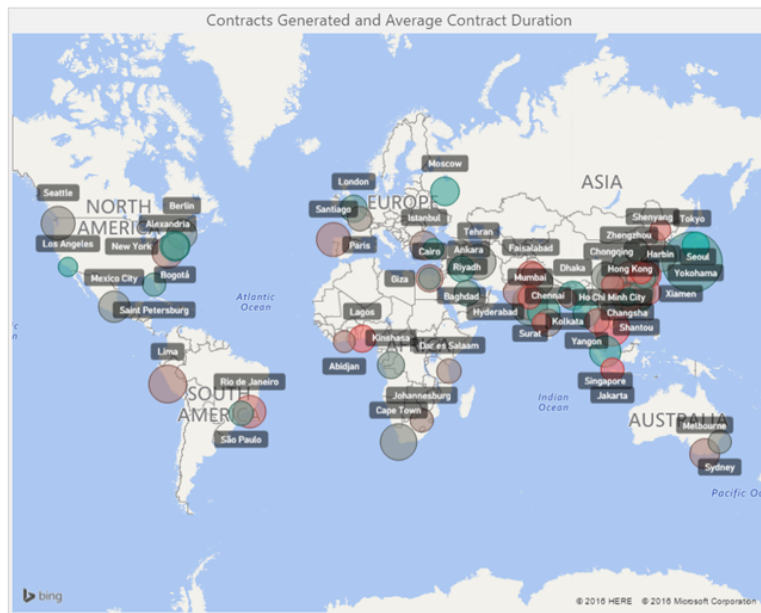
- Details about the deal are entered into the CRM system.
- A document package containing a proposed contract, plus all supporting content, is generated out of CRM- and ERP-stored data (e.g., credit holds, specialized discount rates).
- The resulting document package is routed to an ECM collaborative workspace where it can be viewed/edited online.
- Each in turn, relevant people at both the vendor and customer organizations are invited to review and mark up the online document(s).
- When all comments have been received, the contract specialist is assigned to review/incorporate/edit the document(s) accordingly.
- Relevant people are then directed to again review the online document and approve/reject it, and digital signatures are collected.
- Details from the finished/approved document are extracted and entered into both the CRM and ERP systems, and copies are archived for a specific retention period.
- The contract is executed, triggering the sending of a welcome letter, an invoice, warranty information, customer portal login details, etc.

By digitizing the process, documents are generated in moments using accurate data. Additionally, the process is documented and it's trackable. It frees up people to spend time on the contract details and the reconciliation of changes.

## Legal Contract Lifecycle Management

Sometimes, even well-designed processes can suffer from structural issues, and only monitoring can help justify any changes that would make a difference.

Figure 6 shows the geographic distribution of contracts currently running through a global organization:



**Figure 6:** The circle size indicates how many contract requests were submitted in that particular location, while color (green → red) indicates the average duration it takes to complete the contract. (Source: Nintex Hawkeye)

In Figure 6, the size of the circles reveals the volumes of requests, while clusters of red indicate locations where the average time to process contract requests is greater than average. Large red circles indicate locations “worth investigating” as they are showing both large volumes and large average durations.

In both Figure 6 and Figure 7 (see below), the largest amount of reduced performance seems to be coming from Asia:



**Figure 7:** View of Contract Performance Across Geos (Source: Nintex Hawkeye)

Focusing on Asia, the longest contract completion times are in locales such as Shanghai and central China. Japan and South Korea—by contrast—show much better relative performance. This kind of information allows us to associate a cost with the contract delays.

## Loan Origination

A bank wanted to streamline loan origination and do so in a way that helped them interact directly with the customer—ideally on their phones, if possible.

Previously, customers needed to fill out paper forms and either mail them in or take them to an office. The application would then be passed manually between many bank departments with no visibility back to customers of the status of their application.

A WCA process:

- Customers enter request details into mobile applications and/or web browser forms that already know most of their standard information (so it need not be re-entered).
- Information from the request is transferred into the bank's internal financial software for system-of-record storage purposes.
- Forms are sent to various departments to be filled out (in a browser or in a mobile app) that contain only

information relevant to that department's role in the process. Tasks assigned to both users and software have expected completion times and due dates, so anomalies are caught before the customer notices them.

- Every time the application moves through a new stage in the process, customers are sent alerts.
- Assuming an approval takes place, documents are generated and routed for digital signatures.
- Signed documents are stored in systems of record and money is dispensed.
- Metrics on the overall process, each substep, and each person involved, are gathered and stored in a data warehouse so reports can be run to look for trends or anomalies.

True WCA brings together all aspects of automation, mobile and forms capability, document generation, and analytics. In this case, the bank created a workflow which, in turn, improved compliance, reduced data entry, increased security, reduced software licensing costs (legal only needed to fill out a form, not log into the loan officers' financial software), and kept customers happier.

### **Sales Compensation Plan Automation**

A critical part of any fiscal year is the determining, approving, accepting, and enacting of individual sales representatives' compensation plans. In many, perhaps most, organizations, too much of this is manually handled via paper, email, individual spreadsheets, etc. Any refactoring of quotas, changes in territories, or changes in structures, etc., causes the process to be repeated.

A global sales organization opted to change this. Using WCA, the following was done:

- Calculation models were placed in a shared document library for real-time collaboration and editing.
- Sales reps' metadata (region, KPI, currency, commission rates, etc.) were moved to a searchable, editable, queryable, and securable data store.
- Formal approval on model and data accuracy was gathered by a workflow.

- Documents were generated and routed to each manager with the compensation plans of their direct reports, and approval was secured and digitally signed.
- Compensation plans were then routed to individual sales reps for e-Signatures.
- As each compensation plan received all signatures, that compensation data was transferred to the company's CRM system to make tracking compensation easier, and to make routing that data to the company's payroll system easier.

Several things have been automated in this example. Key things to note include:

- Exception handling to negotiate alternatives are possible, trackable, and alertable when someone refuses to sign a plan.
- Reminders and escalation rules exist everywhere.
- Any change to the plan or the personnel can be handled automatically and painlessly.
- All relevant parties have access to the data and documents they need – and no access to the assets they don't.

The net result included greater efficiency and fewer mistakes, but it cannot be undervalued that a process that used to take a month or more was reduced to no more than one week. It was able to start at the very beginning of the new fiscal year. Delays in the old process affected employee engagement negatively, and this change affected it positively.

**Getting Started with WCA**

When looking to implement WCA, look at customer-centric business processes first. Connecting back-office processes to the front-office customer process is often the catalyst to drive the enterprise to a fully digital state faster.

Sales, Service, and Support have been the most customer-centric areas, but all business areas should be evaluated. However, given that every business is different, evaluating those document processes that are central to how the business is run is a core issue to understand.

**The Document Process Inventory**

Documenting processes as candidates for WCA should be completed, including process execution time, frequency, participants, and content utilized. This is a key step in the analysis.

Figure 8 offers a way to inventory the current set of document-based processes. Ones that have a high impact on customers and are repetitive are WCA candidates that should be prioritized.

<b>Department</b>	<b>Document Process</b>	<b>Customer Impact</b>	<b>Is the Process Repetitive</b>
	List The Document Process	High, Medium or low	High, Med, Low
Sales	Proposals	High	High

**Figure 8:** The WCA Prioritization Matrix. (Source: Aragon Research).

Interestingly, as a byproduct of the successful implementation of WCA, analytics will be automatically captured and reported that will build a process inventory, illustrate use, participants, frequency, content used, and effectiveness of the processes themselves. This in and of itself is a compelling reason for enterprises to move to WCA as soon as possible.

### **Aragon Advisory**

- WCA is core to Digital Transformation; start evaluating use cases
- Leverage WCA as complementary to a DTM initiative, where Advanced DTM capabilities are needed
- Evaluate document-critical document processes to identify WCA candidates, focusing on customer-centric processes first

### **Bottom Line**

Workflow and Content Automation is making the difference in enterprises that need to automate business processes that involve people, data, and content. WCA provides the ability to transform analog processes and to adjust them as needed, thanks to real-time analytics. The combination of automation and flexibility means that WCA will be a key part of the path to becoming a fully digital enterprise.