

HOW TO MAKE WORKFLOW AUTOMATION, **WORK FOR YOU.**

3 steps to put your
processes on autopilot.



xerox™

WHAT IS **WORKFLOW AUTOMATION**?

Workflow automation involves linking up all your discrete, manual processes and automating them. So that complex workflows don't get held up by delayed approvals, physical interventions or manual errors. It's not just about automating individual tasks; it's about animating the broader system. This can start with quick wins – such as automating accounts payable. Then you can cast the net wider to automate full systems and processes end to end.

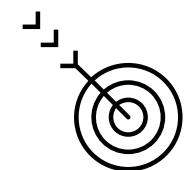
Yet most businesses don't have a specialist automation team in-house. So even if your business has already dipped its toes in, it's unlikely you'll have the experience to integrate those projects on your own. And that's fine – most businesses don't need to be workflow automation specialists. They just need an expert who can help show them the way, while keeping it simple.

They can guide you to take advantage of the unique benefits of automation and deploy the tools and technology to suit your business. So that you can achieve value sooner, in the areas where you need it most.



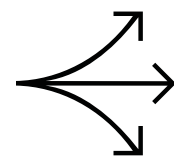
BUILDING A CASE FOR **WORKFLOW AUTOMATION**.

Building consensus for automation is vital – for many business owners and leaders it constitutes a change in how they think about core processes – and therefore how they work. Below are some of the key benefits of automation, which are important to bring into any conversation with teams or fellow decision-makers:



REDUCED ERRORS

Fewer manual interventions helps to decrease the risk of human error.



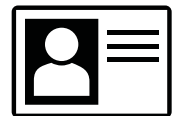
SIMPLE TO SCALE

Easily and rapidly scale your processes to fit your business needs.



EASY ACCESS TO THE CLOUD

Secure access to your processes – regardless of where you are.



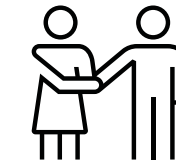
BETTER EMPLOYEE EXPERIENCE

Free up your staff to focus on higher-value work, and speed up decisions by making data more accessible.



STAY COMPLIANT

Handle customer documents and data in line with regulations.



IMPROVED CUSTOMER EXPERIENCE

Maintain responsive communications, keep pace with customer expectations and deliver more.



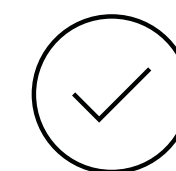
INCREASED PRODUCTIVITY

Minimize downtime and improve margins.



SECURE DATA AND DOCUMENTS

Reassure customers with maximum security, transparency and data-safeguarding precautions.



FUTURE-PROOF YOUR BUSINESS

Avoid knowledge loss from employee churn by digitizing processes, helping you adapt to a changing world.

With these benefits in mind, here is the three-step process you can undertake to launch an effective workflow automation project.

1 IDENTIFY AND UNDERSTAND YOUR WORKFLOWS.

Before implementing automation, it's crucial to identify the target areas. Where can I get the most value soonest, and how will it fit in with my other processes? Sometimes this is obvious at a high level, but many business owners and leaders don't have sight of the manual, day-to-day tasks that are slowing their employees down.

WORK WITH YOUR TEAMS.

Employees on the ground – in finance, sales, marketing, HR, legal, or any other business function – are the ones who truly understand which processes are holding them back. Bring them into the discussion and listen to their input: find out where there is friction between internal teams and which approval processes slow down productive work.

IDENTIFY THE PAIN POINTS.

These discussions often bring to light unexpected challenges, which your employees may not have noticed at first. Perhaps it's accepted as a fact of life that expenses sometimes take weeks to be reimbursed – when actually it's because the finance team isn't receiving them quickly enough due to a fault with the IT systems. Spotting bottlenecks like these – as well as duplicated efforts or manual data-entry tasks – can provide a good shortlist of quick wins.

LET AUTOMATION DO YOUR HEAVY LIFTING.

Think about what your company's heaviest manual processes are and how they could be transformed digitally. Do your processes require total digitization or would deploying a simple application suffice? Do you need to consider implementing a bot?



2 **MAP AND EVALUATE THE WORKFLOWS TO AUTOMATE.**

The next step is to build a sensible and comprehensive map for your automation. It should outline where action is needed most, which processes to prioritize, how automation will work within existing systems, and what value to expect.

LOCATION AND OWNERSHIP.

Establish where the most troublesome manual processes sit within your business, and who currently has ownership of them. Work with those people to build a plan that works for existing employees, as well as budget owners and business leadership. For example, if you automate one process, how does it impact other tasks those employees have to fulfil? How will you ensure that they have other valuable work to do? Then use a mapping tool to plan and take the next steps clearly.

CONSULT WITH TECHNOLOGY EXPERTS.

Work with third-party vendors to build a solution that is employee-centric, rather than technology driven. Technology partners often have a much wider view of the market and have delivered the solutions before, so they can advise you on the right way to proceed. Compare current processes and operations with automated, efficient examples to help map the solution and identify the beneficial outcome. Establishing the objectives and potential gains at this point will help you to compare and prioritize different projects.

DRAW UP YOUR PLANS.

Select the workflows which need to be automated based on the value this will bring back to the business, expected ROI and how it will positively impact your employees and customers. This should balance immediate benefits – which you can share with your teams – against longer-term strategic outcomes. Also, select workflows that need little human intervention and will help lower costs. This will allow you to scale, and gives you the flexibility to be agile and resilient in future.



3 IMPLEMENT THE RIGHT SOLUTION FOR YOU.

You should now have worked out a clear, pragmatic plan with your technology partner for workflow automation. Rather than a cookie-cutter approach, this should be a proposal which is the best fit for your specific business needs. Now it's time to put the plan into practice.

WORK AT THE RIGHT PACE.

The scale and speed of an automation project will vary for every business. You need to ensure the implementation doesn't cause too much disruption for employees, and that critical processes can continue running. You also need to consider the security and compliance requirements at each stage: rushing this will lead to unnecessary headaches later on.

FIND QUICK WINS AND LOW-HANGING FRUIT.

In the course of your planning, you may have identified some universally unpopular processes which are no-brainers to automate. If possible, solving these challenges with out-of-the-box automation solutions can build momentum for the overall project, satisfy internal stakeholders, and win over employees. Remember though, it's vital to integrate these 'quick fixes' with existing software, so that you don't have to come back and rebuild them later on.

IMPROVE AS YOU GO.

No digital transformation project is finished when you flick the switch to turn it on. From the very beginning, you should incorporate analytics to help report on what's working, what could be better or faster, and where you can tweak the process to improve the outcomes.



HOW XEROX CAN HELP.

Xerox has been supporting businesses of all shapes and sizes to improve their processes for decades. We understand the contingencies involved in approval workflows, paper trails and manual tasks – it's what we were set up to do. We've developed tailored workflow automation solutions to support businesses of all sizes in their digital transformation journeys and helped them take confident steps in the right direction.

Our local Xerox solution experts can partner with you to map out the best transformation journey for your business at a pace you're comfortable with. Importantly, we're not here to overhaul your existing processes – our methodology identifies areas where we can integrate with your current setup to keep critical processes running on autopilot. We want to simplify the path for employees and ensure there are no disruptions or dips in productivity.

We provide the tools you need, whether you want to increase productivity, remove paper, eliminate manual tasks or enhance your office environment. We can work as your partner to automate the right processes to lift the burden from your people.

WHAT'S NEXT?

Our Xerox experts are on hand to help out with any automation questions you have. If you're interested in finding out more about our services, visit our website:
[xerox.com/captureandcontent.](https://xerox.com/captureandcontent)

We'll help to map out the automation journey, put your process on autopilot and begin your transformation journey to a more efficient, streamlined tomorrow, today.



ABOUT XEROX.

Xerox Holdings Corporation (NYSE: XRX) makes every day work better.

We are a workplace technology company building and integrating software and hardware for enterprises large and small. As customers seek to manage information across digital and physical platforms, Xerox delivers a seamless, secure and sustainable experience.

Whether inventing the copier, Ethernet, the laser printer or more, Xerox has long defined the modern work experience. Learn how that innovation continues at www.xerox.com.