



Choosing the wrong automation vendor can be disastrous. Learn how to avoid it.

LEADERSHIP INSIGHTS

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Businesses in every industry are transforming every facet of their operations

In the past year, the world has changed more rapidly and profoundly than ever before with major disruptions in every facet of our lives: work, school, shopping, travel, recreation, healthcare, social interaction, entertainment and much more.

To meet the new requirements of these unprecedented upheavals, businesses in every industry have had to rethink their role in this new world, reinvent how they create and deliver products and services, transform every facet of their operations, and come up with entirely new ways to engage with and delight customers.

At the same time, this same disruption that's impacted billions of people around the globe has also resulted in some significant improvements for people as well as for companies:

- For consumers, the pandemic has forced companies to put the customer at the center of everything they do, and thereby given consumers more clout and more options; and
- For businesses, COVID and its ramifications have inspired them to fully commit to automate all facets of their operations so they can remake themselves for the emerging digital economy.

This automation imperative can create enormous value within organizations as it allows them to move at the speed of the markets they serve, dramatically reduce costs, redeploy people to higher-value activities, and pursue new growth opportunities previously out of reach.

Good and bad news



For companies looking to fully commit to this automation imperative, there is, as is so often the case, both good news and bad news:

GOOD NEWS

You've got a vast range of solutions, options, and vendors from which to choose; but...

BAD NEWS

Choosing the wrong vendor can lead to disastrous outcomes: botched projects, low or nonexistent ROI, missed deadlines, and frustrated customers, employees, and partners.



Choosing the right automation partner

That's why we, at Nintex, wanted to share some objective thoughts and counsel on best practices for choosing the right automation partner. And the very first point we want to make is a simple one: no vendor—including Nintex—is the right solution for every automation project.

We're a great choice for a lot of companies and their needs, but no automation-management vendor is right for every process. And any company that tries to tell you otherwise is not being honest with you.

Some automation-management vendors are ideal for huge projects such as automating claims for a big insurance company. These projects are big, complex, expensive, can take a year or more to complete, and are best executed by highly skilled professional developers.

Then there's a middle tier of automation projects around collaborative workflows with moderate levels of complexity and sophistication, and that's where Nintex has established a great track record of success with more than 10,000 customers.

And at the third level, there are companies that provide automation tools for an individual looking to automate a basic linear process for himself/herself or a small team.

Please be sure to bear that in mind: depending on the size and complexity of your needs, there are lots of choices in the marketplace that can meet your needs.

Why can digital transformation be so difficult?

The first suggestion we'd like to offer to help ensure you pick the ideal partner for your company and your desired outcomes is this high-level view of why so many companies that are eager to undergo digital transformation have not been able to do so successfully:

Why organizations struggle to digitally transform

75%

LACK OF VISIBILITY INTO CORE BUSINESS PROCESSES

of enterprises feel processes aren't well understood or up-to-date in their business.

68%

LACK OF RESOURCES TO MEET BUSINESS DEMANDS

of enterprise business processes remain highly manual today despite past digital efforts.

80%

LACK OF CAPABILITY IN CURRENT TOOLS OR SYSTEMS

of enterprises require ongoing process improvement and automation "know-how".

So clearly, we can all learn a great deal from what these past experiences are telling us:



LACK OF VISIBILITY

In most companies, most people don't fully understand the current business processes, particularly on a broad or even end-to-end scale. In many companies, processes are the result of decades of "this is how we've always done it" thinking. Unless processes are analyzed, understood and evolved by the right people in the business the best technology in the world will not make a difference.



LACK OF RESOURCES

Maybe there's a disconnect between the IT team and other teams within the company; maybe leadership isn't willing to commit the necessary funding; or maybe past attempts have been fragmented and have been hampered by an incomplete approach. Whatever the reason, two-thirds of all efforts have not succeeded.



LACK OF CAPABILITY

The world today is changing so rapidly and so dramatically that automation is no longer a one-time fix—rather, it's an ongoing process focused on relentlessly refining and optimizing internal operations to align with and meet the needs of fast-changing external requirements and demands. And it can't work with siloed and fragmented approaches—the world of digital business requires an understanding of and a careful orchestration of end-to-end processes.

Start your search for the ideal automation partner with these 3 categories of questions:

Again, while those past results can be a little daunting, it's important that we view them as lessons from the past that can help us avoid the same pitfalls going forward.

1

THE PROBLEM TO SOLVE

What is the problem we're trying to solve?

What's the level of complexity involved? Is it mission-critical and time-sensitive?

Are you looking to digitize your workflows, create some digital forms, or are you looking to integrate some new web functions with a legacy system?

How well do the people involved understand the current process and the adjacent upstream and downstream processes?

2

WHO WILL BUILD THE SOLUTION?

Who's going to be doing the work in these new workflows?

How technically sophisticated are they, and how technically sophisticated will they need to become?

And, as in #1, How well do the people involved understand the current process and the adjacent upstream and downstream processes?

3

WHAT CAN THE PROCESS BECOME?

Given where my business is headed as we map to the changes in the markets around us, how can we best reimagine what the new processes should be to meet the needs of our evolving business and opportunity?

Rather than automating a process that is tied to my past—"We do it this way because this is how we've always done it!"—what is the new optimized process to support my reimagined business of tomorrow?

What will the new workflows look like, and how can we leverage various automation capabilities to meet the needs of the fast-paced digital economy?



REIMAGINE, TRANSFORM, OPTIMIZE

Armed with a clear understanding of your answers to those questions, you'll be in an ideal position to take the next step toward becoming an end-to-end digital business. The next step involves adopting a mindset and then a culture built around the essential cycle of:

Reimagine your future

What your customers want and need, how to meet those needs and empower your people, and what your new business will need to look like.

Transform how you function

Focus completely on automating your future, not tying yourself to your past; and

Optimize your processes—relentlessly

This requires an ongoing commitment because the world outside and the markets you serve are changing constantly and will continue to do so.

With that big picture in mind, you're at the ideal point to narrow down your search for a process automation provider. Following are some suggestions to help you in the process.

Key factors in making your final choice

- What is this vendor's primary area of expertise? And how well does that align with my needs?
- Does this vendor share my commitment to an ongoing cycle of reimagine, transform, and optimize?
- Does this vendor share my values and my culture?
- Will this vendor value me as a customer, or see me as another anonymous transaction?
- Do I feel I can trust this vendor with the future of my business?
- Customer references are the best asset a software vendor can have because they demonstrate the ability to drive not just a purchase but a successful implementation and follow-through. So, how eagerly does the vendor offer customer references? How prominently are customers showcased on the vendor's website?
- What type of partner network does the vendor have? Like the point above about customer references, a healthy partner network is a sign of a vendor that can build and sustain trust and success.



And finally, the economics

As in every market, the process automation sector offers customers an extremely wide range of price points.

If a vendor can meet your needs on all of the questions above, can it also align with your budget?

Does the pricing reflect the right value you need, the transparency you deserve, and the confidence to eagerly agree to move forward?

Does the vendor allow you to start small and prove value? Is the vendor's contract growth tied to the growth in your success? Once proven, does the vendor offer attractive enterprise-wide usage options?

Conclusion

Business processes have always played a key role in the ultimate success or failure of companies, but never have they been as essential and truly mission-critical as they are now.

We hope this overview of best practices for choosing a process automation vendor will help you find the ideal provider with which to form a close and trusted partnership that will help you and your company thrive in your digital future.



About Nintex

Nintex is the global standard for process management and automation. Today more than 10,000 public and private sector organizations across 90 countries turn to the Nintex Platform to accelerate progress on their digital transformation journeys by quickly and easily managing, automating and optimizing business processes. Learn more by visiting www.nintex.com and experience how Nintex and its global partner network are shaping the future of Intelligent Process Automation (IPA).

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