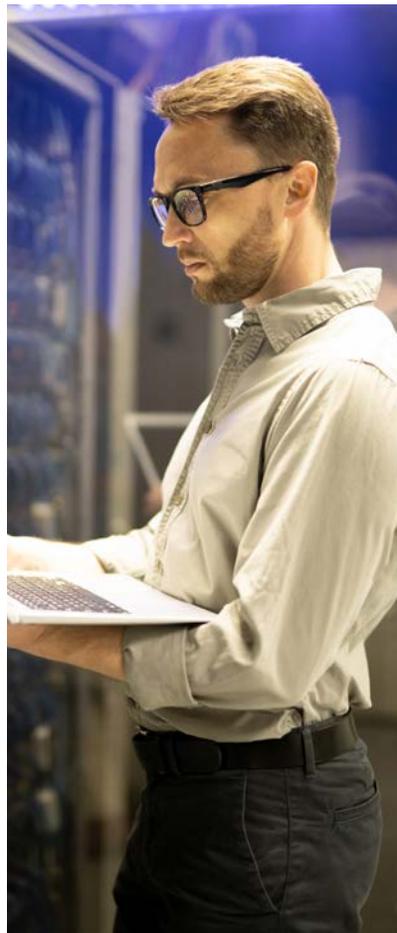
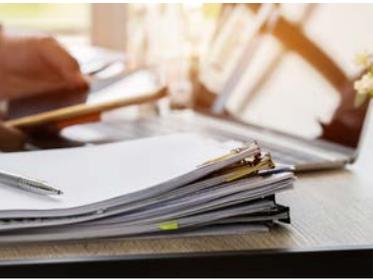




The Enterprise Buyer's Guide for Business Process Automation Software



Wave Technology Solutions Group
The Information Management Experts

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Introduction

If you're reading this, it's probably that your organization is considering business process automation software.

With business process automation functionality, you can streamline repetitive, rules-based workflows. Automating these types of business processes creates more efficiency in enterprise resource planning (ERP), greater cost savings, and improved utilization of your human resources.

While most enterprise businesses today have implemented some form of automation, digital transformation, or process improvement, many fail to realize the full potential of automation technology and struggle to phase out remaining time-consuming manual processes.

While partially automated processes will give you a slight edge, they can also end up costing you in the end.

In this enterprise buyer's guide, we'll explain

what business process automation is, how it works, its benefits, and the criteria you need to consider when evaluating BPA software.

So let's dive right in!

What is Business Process Automation: A Primer

Business process automation (BPA), also known as business process management (BPM), is the act of using technology to streamline routine, rules-based tasks such as sending documents, data entry, routing payments, or organizing documents.

Utilizing automation can significantly improve an organization's bottom lines by streamlining tasks, creating efficiency, and eliminating manual tasks which enables your staff to focus on tasks that grow the business.

Modern automation platforms, like those you're likely evaluating, implement



innovative technologies like artificial intelligence (AI), machine learning (ML), and robotic process automation (RPA) to perform repetitive tasks on a human's behalf.

Ultimately, people are still your greatest resource, but through workflow automation, your teammates can work faster on more productive tasks instead of having their time monopolized by tedious manual tasks.

The Benefits of Business Process Automation

The following are just a few of the awesome benefits of BPA or automated workflow software:

- ▶ Eliminate Human Error
- ▶ Streamlines Repetitive Tasks
- ▶ Reduces Inefficiencies
- ▶ Deters Fraudulent Activity

- ▶ Creates Cost Savings
- ▶ Reduces Suppliers Inquiries
- ▶ Better Visibility Into Workflows
- ▶ Improved ROI
- ▶ Improved Vendor Relationships & Customer Satisfaction

Use Cases for Business Process Automation

Any business that has tedious, repetitive tasks can benefit from process automation software. Some of the most common business and industry use cases include:

- ▶ Accounts Payable
- ▶ Purchase Order Processing
- ▶ Data Entry
- ▶ Document Management
- ▶ HR New Employee Onboarding
- ▶ CRM Processes
- ▶ Social Media



What are the benefits of automated document management software?

Finding the process automation platform that fits your organization starts with looking at your organization's current business processes, identifying opportunities for automation and evaluating the marketplace for systems.



1. Define Your Business Needs

Before ever evaluating software options, the most important thing to do is to understand your business needs and requirements.

Neglecting this step could result in purchasing software that ultimately doesn't grow with your organization, or purchasing additional features that you really don't need. Gather your department heads and key stakeholders to discuss the following:

- ▶ What processes are prime candidates for automation?
- ▶ Do you need the software for a particular department, or does it appear that the software can be used by multiple departments?
- ▶ Are there any dependencies that prohibit you from implementing a new system? For example, your current software just renewed for the year, and replacing it or significantly changing workflows now would be financially unfeasible.
- ▶ How many users will require access to the system? What are their roles: admin, editor, contributor, etc.

2. Conduct Pre-Purchase Research

Once you have your foundational needs pinned down, you can start looking for potential solutions. There is a lot you can learn on your own before reaching out to a vendor or entering a high-pressure sales negotiation.

Here are few resources you can typically find on software solution websites or through a simple Google search that will help you conduct your initial research.

- ▶ Recorded Demos

- ▶ Pricing/Licensing Tiers
- ▶ Product Pages/Data Sheets/Explainer Blogs
- ▶ Product Comparisons
- ▶ Peer Reviews
- ▶ Partner Referrals

3. Submit RFIs to Potential Vendors

Once you've done some preliminary research, you can begin asking for customized price quotes from the solutions you're most interested in learning about.

While many software websites offer pricing, most business process management software simply offer starting prices and will need more information about your business to prepare a definitive pricing model for you.

If your organization uses a more formal procurement process, this would be the time to start sending the initial requests for information (RFI)

which specifically outlines your requirements for potential vendors.

During communicating with potential vendors, it's imperative that you get all of your questions answered and make sure that the proposed platform meets all of your needs. This will help you to narrow down vendor options during procurement later on.

4. Understanding Licensing Structures

One of the most important pricing considerations for an automation platform is the licensing structure. There are a variety of user models that software companies use and it can have a significant impact on the total cost of ownership. Here are some of the most commonly used structures:

- **Per-seat or per-user licensing:** means that pricing is set per person. This is why it's very important to determine your total number of users.
- **Maximum user licensing:** This is total pricing with the

maximum number of users allotted and additional users available for an additional cost.

- **Site licensing:** Rather than per user, this type of licensing allows you to use the software at a single (or multiple) predetermined locations.
- **Ongoing vs subscription licensing:** Ongoing licensing is typically pay once and use indefinitely, whereas a subscription price will need to be renewed monthly, yearly, or another predetermined time period.

The pricing model that works best for your organization will ultimately depend on budget, the number of users or site locations, as well as the level of flexibility you want. For example, if you'd rather not be locked into a long-term investment, you might opt for a subscription model that you can cancel should you feel the need.

5. Deployment Models

The deployment model



is another important consideration as your organization might have certain legal or compliance-related requirements that dictate you use only one type of infrastructure. For example, many organizations in the healthcare and government sector have strict regulations which demand they keep all computing and application infrastructure on-premise and that any new application be certified in compliant in a specific framework like HIPAA or FedRAMP.

Many vendors offer multiple deployment options for this very reason. These can be divided into two main groups: on-premises, off-premises, or hybrid deployment.

- **On-premises (Data Center):** This hosting option requires your organization to deploy the software via your on-premise data center environment. In doing so, your organization retains complete control over the installation, architecture, administration, maintenance, and data security.

This limits the scope of risk involved with outsourcing deployment to a third party, but it also increases your

responsibilities and includes its own level of risk.

For example, neglecting routine updates and backups could put your organization in a precarious situation if a data breach or disaster were ever to occur. But as stated previously, for some in a compliance-heavy industry, there may not be an option here.

- **Off-premises (Cloud-based):** For organizations that are either not obligated by compliance, or have regulatory requirements that a cloud option can meet, this option may be far more attractive.

This is due to the fact that cloud deployments allow your organization to offload much of the administrative and maintenance concerns it would otherwise be responsible for.

Furthermore, most enterprise-level technology is built on best-in-class infrastructures like AWS or Azure and offers redundancy, reliability, and even service level agreements (SLAs) should you desire an uptime guarantee.

- **Hybrid (Mixed) Deployment:** The third option, for those that want

to take advantage of cloud innovation but operate in a compliance-heavy industry, is a hybrid or mixed deployment.

While a bit more complicated, a hybrid environment would have all your sensitive data and related aspects in an on-premise environment while your non-classified data and processes can be implemented in a cloud environment.



6. Implementation Requirements

Another important consideration is the implementation requirements, on behalf of the software vendor, for your organization. Just because you may want to use a certain tool, doesn't mean your existing capabilities are sufficient to run it. Therefore it's important to consider the following:

- **Configurability.** Does the software come with all necessary functionality out of the box, or will it require some tweaking once installed? This is important to understand to ensure you can get the most from your investment and start off on the right foot.
- **System requirements.** In the case of an on-premise deployment, do you have all the necessary hardware to run the software properly? If not, your entire investment could be compromised.
- **Elasticity.** Can the software scale to meet higher demand as your organization grows, if the maximum number of concurrent users is online, or if your infrastructure incurs a utilization load spike? It's crucial to select an automation software that can scale



to accommodate growth or a utilization flux. Many SaaS and cloud options provide auto-scaling as the need arises, whereas most on-premise deployments require that auto-routing during load spikes is implemented in advance.

7. Integration Capabilities

Another key consideration is integration potential. While the idea of an all-in-one solution is a beautiful concept, it often doesn't work that way. Particularly with automation, the automation tool will need to communicate with various systems and other platforms based on how many business units are utilizing it.

Therefore, you need to provide your potential vendors with

a complete list of all systems and tools to ensure that your automation software can integrate well with each.

Alternatively, if a particular tool is not listed under integrations, does the software vendor offer an application programming interface (API) so that a developer can connect your systems his or herself?

If there isn't a pre-built integration in place for your other systems, and the API either doesn't exist or is extremely complicated to use, it may not be the best fit for your organization.

8. Customer Support

Yet another important, yet often overlooked feature is available customer support. Often organizations don't

realize the value of good customer support until they really need it and it's not available.

Every software vendor has its own unique customer support offering whether it's 24/7/365 or restricted to certain hours. They typically also have a scope for their customer support services- issues they will support and issues they won't.

Most often, basic customer support is offered for issues relating to the tool itself, however, problems that are customer-facing (i.e. implementation issues, best practices, etc) may only be



available at a premium, if at all.

Either way, it's important that you understand what your level of customer support offers, its availability, and the options at your disposal (i.e. ticket service, phone, email, chat, etc). Also, as your team is learning to use automation software, it's important that they have training resources available, whether live or pre-made.

Example include:

- ▶ Webinars
- ▶ Guides
- ▶ Training Labs
- ▶ Tutorial Videos
- ▶ Instruction Manuals or Documentation
- ▶ Community Help Forums

9. Security

Another important consideration is the software security features. With an automation platform, it's very likely that it will have contact with sensitive data, therefore, you need to be sure that any data utilized is safe from unauthorized access. Ensure that your software offers the following security features:

- **Access management** to control who can access the tool.



- **Permission controls** to identify what a user can and can't access while using the tool.
- **Compliance certification** (if necessary) to ensure that the vendor has met all its obligations to comply with any legal regulations that your organization is responsible for.

10. Ease of Use

Finally, it's important that the tool is intuitive and user-friendly for your team members. An overly complicated user interface can result in lost productivity as you allocate time and resources toward having your

team train on how to use the tool.

Offerings like a free trial can help to ensure your teams enjoy the product before purchasing. Additionally, demos, training resources, and process templates can also go a long way to shorten the learning curve as all tools, even intuitive ones, will require some sort of adjustment period.

The Procurement Process

After your company has reviewed all of the evaluation criteria and you know what you're looking for, it's time to start considering your options, narrowing down your choices, and ultimately buying and implementing the product.

The following is a step-by-step guide to help you with the procurement process.

Step 1: Compare your Options

It's likely you've already

prepared a list of potential vendors during the evaluation process. Now it's time to eliminate any that don't meet your needs and narrow down your short-list. Once your short-list is ready, compare your options based on the following characteristics:

- ▶ Price
- ▶ Features
- ▶ Free Trial Options
- ▶ Customer Support
- ▶ Security & Compliance Capabilities

Step 2: Schedule Demos

With likely only 2-3 options remaining, it's not time to see for yourself what the tool's capabilities are. Not only will this help you evaluate functionality, but it will also give you a sense of the product's ease of use. If it has an overly complicated user interface or appears as though it will require a steep learning curve, it may not be the best fit.

Step 3: Making the Purchase

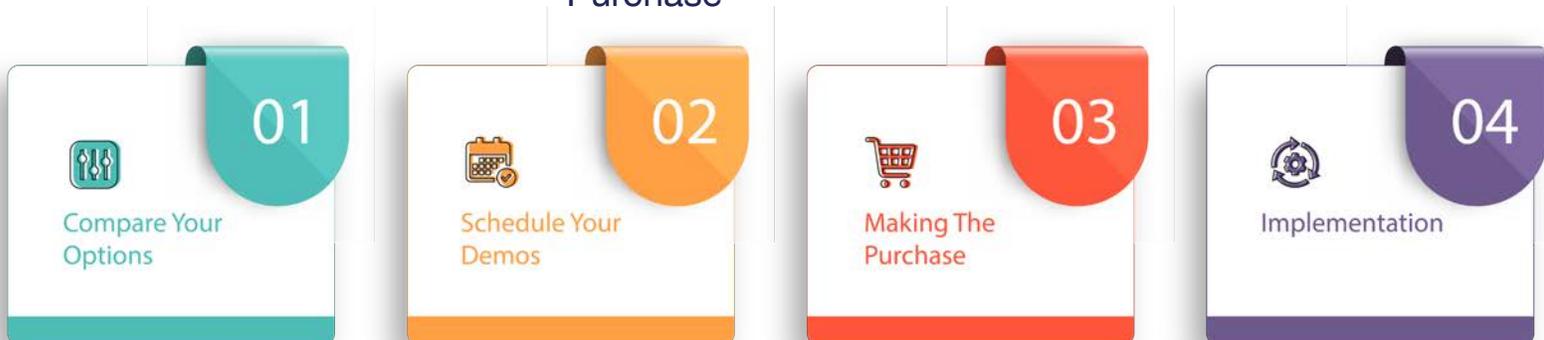
When you've made your final selection, don't just pay the full asking price. There may be room for negotiation, and if not, there may be an extended free trial you can utilize before monthly or annual payments.

Furthermore, be careful of hidden pricing technicalities such as flat-rate vs per-user pricing, or paying for extra functionality you don't need.

A vendor that is completely unwilling to negotiate, or provides shady pricing with a lot of hidden fees is likely not going to be a good long-term partner for your organization. Think strongly before proceeding as you may regret your decision down the road.

Step 4: Implementation

Once you've made your purchase, it's time to implement your new system. Depending on how deeply embedded your previous tool was, or how complicated the integration is, this process might get a bit complicated. Here are a few tips to help you



ease the transition.

- Educate your team members on the new automation platform, have them view demos, or attend training. It's important for long-term scalability that each of your teams use the software according to best practices instead of implementing their own individual uses.
- Involve customer support when needed for technical issues.
- Enlist the help of a solutions partner like Wave.

While many software companies have technical support for problems relating directly to their software, often issues around best practices and implementation optimization are out of their scope.

We can help you roll out new software in a phased approach that makes the most sense for your business and results in as little downtime as possible while ensuring that everyone knows how to use the software according to best practices.

Start Your Organization's Digital Transformation with Wave

Manual business processes slow your business down, leading to bottlenecks, disjointed workflows, misplaced information, and human error. This decreases productivity, leads to higher expenses, reduces your control over the business, and can ultimately limit your long-term sustainability and scalability.

Wave helps businesses like yours to implement automation solutions and content management systems (CMS) that streamline your processes end-to-end, automate tedious, repetitive tasks, and can integrate with any ERP system of your choosing.

While we work heavily with ECM systems like [OpenText](#), [M-Files](#), and [SharePoint](#), we're happy to work with whatever system you're currently using.

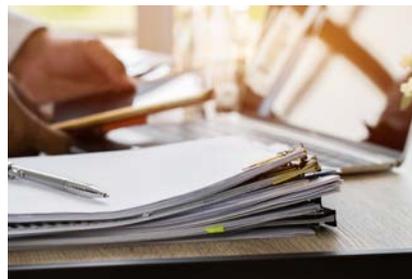
Instead of tearing out deeply embedded legacy tools, we can come alongside your system and implement supportive tooling that can complement and enhance your current systems.

We can also deliver our automation tools as an on-premise or cloud-based solution to suit your compliance needs and budget.

If you'd like to learn more about how Wave can help support digital transformation and business process automation in your business, reach out today and we will be more than happy to set up a time to chat.



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