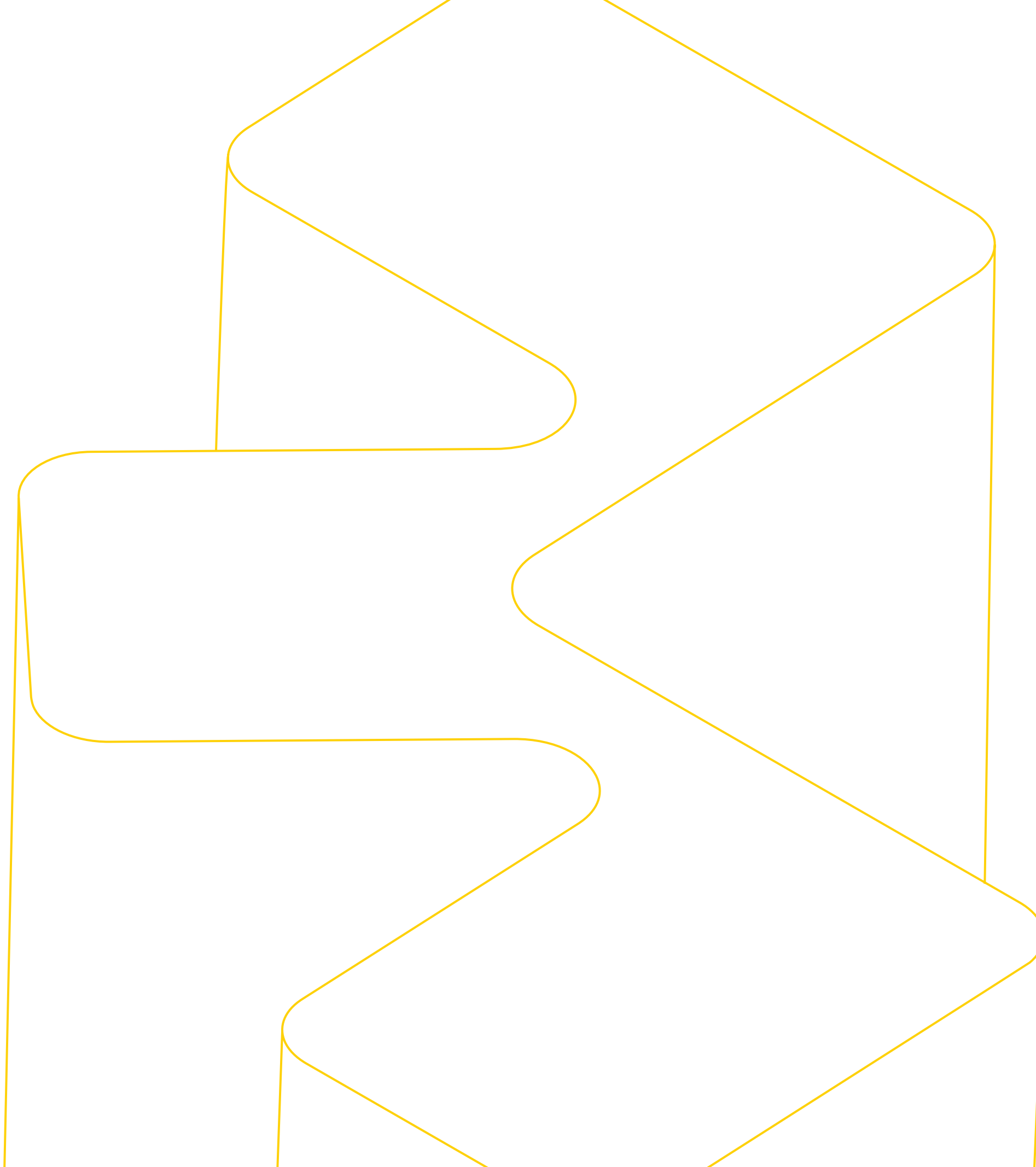


# Robots in disguise!

How to make business process automation tools work for you





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# Introduction

Say the word **automation** and people often equate it with making people redundant but this is an incorrect view that clouds the many transformative benefits business process automation can bring to organisations of all sizes.

While there is no doubt that developments in technology, and ERP solutions in particular, have left few industries untouched by disruption, it's also true that within this disruption lies much opportunity too.

In fact, the kind of business process automation tools now found in modern ERP systems are powerful transformers of business for good. People remain very much central to businesses as automation solutions enhance human capabilities.

The result is a commercial environment primed to deliver growth with automation allowing your people

to focus on adding real value to the organisation. Value that only humans can provide but is often buried underneath a weight of tasks that do need to be done but add little in the way of additional value.

In this ebook we separate the facts from fiction, when it comes to business process automation. We provide you with an approach to extract more value from your ERP solution in the process.



  
intact

# Building an intelligence hub in your organisation





Business process automation tools work best when they're working with the teams of people driving your business.

When we look at what modern ERP systems can do for businesses, the automation capabilities it brings contributes massively to enabling:

- Workflows and dashboards to be personalised per team and per employee - people are immediately able to get their hands on the right data to make informed decisions
- Reports can be customised to reflect relevant data per business function, and can also be based around exceptions to your business processes
- Warehouse and delivery processes can be made more efficient and more accurate
- Your management team will be enabled to simply and effectively enforce important business rules and processes that impact your bottom line and customer satisfaction levels 365 days a year.
- Manage cost prices and fully protect and maintain margins
- Quick access to data in real time
- One source of truth is established where all teams can pull data from a centralised database
- All business processes within a business can be tracked

To date, enterprise technologies have mainly been systems that facilitate order processing and keep a record of different aspects of an organisation, e.g. how much stock is in place, how many sales happened last quarter etc. i.e. they helped you **record and measure** what was happening in your business.

New ERP solutions are replacing these older technologies with systems that prioritise building predictive intelligence within your organisation i.e. they now help you proactively **control** what's happening in your business.

Today, many of the claims made by automation and Artificial Intelligence (AI) are not strictly true. However, modern ERP systems are definitely able to harness data to forecast important growth numbers and stock orders for your business.

And the intelligence is not restricted to just one arm of your organisation. Business process automation tools collect and interpret the data generated by your ERP solution and any other integrated software

solutions you employ; from warehouse management to marketing to customer support to sales (and that's to name just a few).

It's here that the collaboration between technology and human capability really comes to light. No human can interpret massive loads of data in real-time. It's even more impossible to interpret data coming from different sources all at once – and accurately at that. This is one of the areas where an ERP solution delivers huge benefits to an organisation.

How? By taking care of the tasks that can be better performed by automation tools, and freeing up your employees to do what they do best.

No machine or robot can replicate what humans do best. And that's using data to find insights that form the basis of sound business decisions. It's in the creative and critical thinking stakes that humans outstrip machines any day of the week.



Research shows that organisations that combine the best of people and data software experience significant growth.

In 2017, Forrester estimated that “just a 10% increase in data accessibility will result in more than \$65 million additional net income for a typical Fortune 1000 company.”<sup>1</sup>

Furthermore, Dell Research found that organisations that actively use Big Data in their business processes achieve revenue growth rates that are 50% higher than equivalent organisations that don’t.<sup>2</sup>

# 50%

## higher revenue growth rates

Organisations that actively use Big Data in their business processes achieve revenue growth rates that are 50% higher than equivalent organisations that don’t

<sup>1</sup> Forbes: Better Data Quality Equals Higher Marketing ROI

<sup>2</sup> Intact Software: The Power of Big Data

**Your ERP tool is  
your path to digital  
transformation**



In recent years, customers' ever-changing demands have resulted in a high degree of disruption across every industry. No industry has been left untouched by it.

The advent of ecommerce some twenty years ago gave customers a taste for what's possible. Two decades on, personalisation, choice and speed of service are now seen as the bare minimum any business should offer.

But how do you keep up with a modern commercial environment with obsolete enterprise technologies and business software systems that are just not cut out for the task?

There are no one-size-fits-all digital transformation strategies that business owners can simply adopt and plug into their own businesses to get the job done. However, a modern ERP solution really comes into its own in these circumstances and often forms

the foundation of a solid digital transformation for companies of all sizes. Why is this?

For starters, it's because digital transformation is not just about digital. It's really about the mindset that an organisation adopts to meet the changing demands of their customers. Too often the customer is not seen as a whole entity within companies.

Each aspect of the customer experience might be managed by a different part of the business. But an ERP solution allows you to place the customer at the centre of your operations while helping you build the core systems you need in place to service them.

Secondly, an ERP solution helps you, in part, towards your digital transformation. But there are many questions to be answered along the way too. Should you be in the Cloud? Do you need to employ mobile apps? Does everything need to be mobile?

There are so many different digital tools available today that it's easy to lose sight of the all-encompassing digital transformation you want to instil at the core of your organisation. Before taking on any niche app or piece of software, examine what it will mean to your business. Will it add value? Will it enable you to realise your digital transformation strategy? Can you integrate it with your ERP solution and what value will this bring?

Our blog on the latest trends to emerge in **ERP in 2020** highlight the considerations to make if you're embarking on your digital transformation journey. Your business can't be all things to all people, but it can build a culture of **operational excellence** from the inside out and grow in the certain and uncertain times ahead.

Before taking on any niche app or piece of software, examine what it will mean to your business.

- **Will it add value?**
- **Will it enable you to realise your digital transformation strategy?**
- **Can you integrate it with your ERP solution and what value will this bring?**







# Automation and real-time





Today's business environment demands the highest level of efficiency possible. One of the best ways to effectively achieve this is of course to leverage your business software to automate labour-intensive processes.

Whether you undertake some, or all, of your processes manually, you need to understand the level of automation now available in the latest ERP systems and the benefits they could bring your business.

Not only will it help you to protect and maintain margins but also maintain adequate stock levels, manage cost prices and credit limits and/or improve customer service. It allows you to retain complete control of your business without the need for micro-management; that's the ERP systems job.

Say you have a complex supply chain, for instance, and you need to take various factors, such as sales, customer demand, weather patterns, delivery times etc. into account to always have stock on your shelves.

What if you could simplify this to have a co-ordinated lean supply chain in place? A lean supply chain where real-time data feeds automated replenishment functionality in your ERP system? This is where automated purchase orders, that take into account both past and future scenarios and any exceptions you dictate, are auto-generated to ensure orders with that supplier are fully optimised and your stock is managed to maximum holding effect.

What would it mean for your cash flow if you could keep customers happy while reducing the need to hold excess inventory at the same time? What would this mean for profit margins and for scalability?

Business process automation encompasses everything from scheduled reports, alerts and workflows to suggested orders, authorisation rules and automated KPI dashboards. Combine these with the real-time data provided by the latest ERP systems and you've got a future-focused business right there.



Sales

Daily Figures KPIs and Tasks SQL Query

Todays Figures

- Active Workflow Items
- Todays Figures
  - 0 Todays Quotations
  - 0 Todays Sales Orders
  - 0 Todays Deliveries
  - 0 Todays Invoices

Sales Workflow

- Active Workflow Items
- Sales
  - 94 New Sales Orders Not Yet Delivered
  - 1 Customers on Stop
  - 1 Security Total > 500
  - 51 Customers who havent order this Month
  - 4 Sales Orders Need Approving
  - 14 Delivery Notes Not Yet Invoiced
  - 99 Part Supplied Sales Order with Due Date Last Month - (Am...)
  - 9 Sales Invoices Due Payment Next Month
  - 25 Customers who havent bought in 2mths
  - 371 Quotes Due for Review
  - 133 Sales Order Under 25% Margin
  - 4 Sales Orders On Hold
  - 14 Unbilled Delivery Notes Awaiting Approval
  - 60 Customers with No Contact This Month
  - 99 Part Supplied Sales Order with Due Date Last Month - (Am...)
  - 8 Customers Balance Over 1500
  - 3 Customer Over Limit
  - 25 Customers with Invoices Over 60 Days

Customers

Orders

New Order

Quotes

New Quote

My POs/P1



18

Active Prospects

6,909k

Orders - This week vs Last week

0k

Invoices - This week vs Last week

60

Customers with No Contact This Month

25

Customers who havent bought in 2mths

25

Customers with Invoices Over 60 Days

3

My Credit Requests - Awaiting Approval

0

Orders Despatched Today

0

Credit Notes

Real-time, accurate information is the backbone to your most important decisions. It shouldn't be difficult to access, hard to use or inaccessible when you're out of the office. Your team will no longer make decisions in a reactive fashion, but rather as an embedded part of their day-to-day tasks.

It's the marriage of real-time relevant data and automation capabilities in your ERP solution that allows you to really leverage data to positively impact your business. It's not having the data, it's what you do with the data that matters and when you trigger automation functionality to access and use this data to enhance the business, that's digital transformation in action.

The real-time possibilities are endless. Think new product launches, enhanced processes and customer experience, service level agreements being met (and exceeded) and new strategies and plans being executed at the scale and speed that places your organisation in a winning position.

**Real-time, accurate information is the backbone to your most important decisions. It shouldn't be difficult to access, hard to use or inaccessible when you're out of the office.**



Additional benefits  
that **automation**  
can bring to your  
**business**



The two most attention-grabbing benefits that automation brings to any organisation are:

- The ability to automate mundane tasks
- Free up human resource time for more analytical, creative tasks

But these are not the only advantages your business could benefit from if you take a step back and really evaluate what it can do for your organisation.

Listed right and discussed further in the preceding pages, we take you through the above benefits and some of the ancillary benefits of automation.

Some of the ancillary benefits of automation:

**1. Reduce costs**

**2. Allocate your workforce better**

**3. Reduce errors**

**4. Enhance collaboration**

# 1.

## Reduce cost

Holding less inventory is just one example of how operational costs can be reduced through automation. No doubt your business relies on a supply chain. Imagine if the life cycle in getting your organisation's products to your customers could be reduced. What positive impact would that have on costs? Also, while mass job losses are possibly grossly exaggerated when it comes to automation, your focus on hiring employees will shift to quality over quantity.



## Allocate your workforce better

Just about every organisation has processes that amount to little more than repeated actions. These tasks can be automated and hours of your workforce's time is released to spend on more value-added tasks or future strategic initiatives. Employees could begin to operate cross-functionally to deliver operational excellence. On average, post implementation of the **Intact iQ ERP solution**, businesses are saving 5.6 days per month.



# 3.

## Reduce errors

To err may be divine, but some mistakes can have big consequences for impacting customer experience negatively or cutting into your bottom line. Your workforce may be highly efficient and committed people, but errors are able to creep in anyway. There's simply no way of avoiding them. However, automation can drastically reduce the possibility for errors in your business processes.

## Enhance collaboration

Many organisations operate in silos and this can compromise the customer experience they deliver. However, they may not be able to operate any differently as long as different technologies handle different parts of their businesses. The result is a fragmented view of your customer. Additionally, it's difficult to accurately manage the data flow on complex projects when teams are operating separately. Automation can help keep track of project plans, KPIs and deadlines across your entire organisation, greatly enhancing knowledge-sharing and productivity.

A large, bold yellow number '4' with a dot, positioned on the right side of the slide. The number is set against a dark blue background that features a large, curved shape on the left side, resembling a stylized '4' or a large bracket. The overall design is modern and minimalist.

Keep the **1+1=3**  
analogy to the  
forefront



Of course no one thinks that R2D2 is standing outside your business front door ready to make your staff redundant. As we've shown, it's about marrying technology with humans to yield results that will enable your business to excel versus thinking about themes like robotics, AI, VR; concepts that will add little immediate value to your employees and business.

But remember automation is part of the same family of new business applications and technologies. To some degree we're using the terms interchangeably. But automation is different. It can make a positive, practical impact to your business today, if you embrace it.

We're hugely excited by the potential automation has to level the playing field and help businesses of all sizes grow.

But not all automation tools are equal. To make business process automation tools really work for your organisation, you need to ensure that you do

your due diligence and implement the tools that are right for you.

An ERP solution is an excellent example of how automation technology can be incorporated within a business while business leaders retain control but many ERP solutions still fail to offer these capabilities. Ensure your ERP or business management solution offers you automation tools to augment, strengthen and support human capabilities.

Your system administrator team will be critical to your automation strategy, but other teams in your organisation also need a seat at the table. Make sure your taskforce really understands how dynamic the processes need to be within your company to meet the changing conditions of the retail environment.

And rest assured that automation is a methodology that can add immense value to your business.

# Ready to get started?

Intact has been providing perfect-fit ERP and business management solutions that elevate businesses like yours since 1992. If you want to see how we can help you, *get in touch* and talk to one of our experts.

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

