



WHITEPAPER

# **DIGITAL TRANSFORMATION REDUX: A NEW GUIDE TO SURVIVAL IN TODAY'S DIGITAL AGE**

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# Introduction

Once a cornerstone of all the ways we do business, face-to-face and manual, paper-based processes have snowballed into a behemoth of time-consuming, revenue-draining activity. The digital age, marked by convenience and efficiency, demands every business go a new route—one that is remote and paperless.

The necessity for this new digital transformation sounds daunting to a lot of organizations. After all, employees are accustomed to many of its artifacts—walking down the hall to retrieve a record tucked away in a filing cabinet, attending a long-running industry conference, or traipsing upstairs to track down a wet signature from a supervisor. These processes, although impractical, felt comfortable. They felt easier than the intimidating process of going digital.

COVID-19 brought any remaining reliance on paper and in-person processes to a grinding halt. The near instantaneous closure of office buildings excluded face-to-face interaction from the daily routine.

This comes as a jarring adjustment, as a majority of companies never had a remote work program in place. Employees of tightly regulated industries like banking and on-site services like higher education were tethered to their offices without the need for remote or digital technologies. The pandemic has now forced companies to overhaul every way they do business, as “business as usual” is no longer possible.

From sales to HR, this white paper will spotlight what roadblocks various departments are experiencing during the coronavirus crisis, and how it is now easier than ever to bolster your organization’s digital transformation. Using this guide, your company can kick start a new era of digital-only productivity by using tools and workflows that modernize your in-person activities and banishing time-consuming, revenue-draining paper processes once and for all.

# How sales departments can benefit from a digital transformation

Many sales departments rely on in-person meetings to secure new business and cultivate lasting relationships with key accounts. Remote work mandates and corporate travel bans have eliminated many of these critical face-to-face channels, pushing sales teams to implement new digital tools for connecting with new business. Similar to a warm smile and handshake, the right digital workflows have the ability to powerfully connect with current and potential clients alike

## Boost client engagement

While CRM systems are a critical tool in a sales team's digital arsenal, oftentimes they result in a trove of data that goes unseen or ignored. These systems are rife with actionable, revenue-generating insights and organizations simply need the right tools in place to make use of it.

Using powerful digital tools, companies can design workflows that take advantage of gems hidden in their CRM or marketing automation systems. For instance, if a certain type of customer is driving increased sales, the right workflow can identify other potential customers that exhibit similar behaviors. Using automation, the system can integrate with a marketing platform to send out a relevant white paper or resource and also alert the appropriate salesperson to schedule a Zoom follow-up to close the deal.



## Eliminate approval bottlenecks with auto-generated contracts

Sales teams often work in disparate systems: a CRM where they input customer information, and another where they type in the same data to generate a contract or agreement. Afterwards, a supervisor(s) must manually review the documents, mark revisions, and sign-off with a wet signature.

Digital workflows can automate the administrative side of the contract process:

- Create a system that automatically pulls customer data into a pre-existing contract template.
- The system automatically sends the agreement to the corresponding stakeholders who can mark-up the document digitally, or instantaneously approve via the click of a button in their email inbox.
- Once finalized, the appropriate supervisor can give it their digital signature using deeply integrated e-signature tools.



By automating many of the administrative tasks, you can allow your sales team to focus on what they do best: develop client relationships and close new business.

## Increase cross-department transparency

With sales staff scattered around the globe, it's more important than ever that everyone in sales has access to the most up-to-date inventory levels. For example, if a factory is behind schedule in manufacturing of a popular product, this information needs to be readily available for sales staff before they start taking in new orders. For a software company, sales must constantly remain in the loop regarding patches and releases from the engineering team. Automated alerts can inform staff of shipping or development delays, supply chain shortages, and other concerns, so they can proactively reach out to customers before it becomes too late.

# Digitizing your human resources department

Human resources is at the epicenter of an organization's paperwork, but it is also a hot bed for digital innovation opportunities. Between managing paperwork for a pool of potential applicants, monitoring the onboarding process of new hires, handling time-off requests, and communicating company initiatives with employees, HR bears the brunt of an organization's manual, paper-based processes.

The changing landscape brought about by the pandemic ushered in a new set of challenges for human resource professionals. Now responsible for crisis response, HR has become the centralized hub of information. However, in a recent survey of HR professionals, 42 percent believed they were only moderately prepared or trained to face this fresh crop of challenges remotely. Announcements of company-wide safety measures or travel bans and coordination of remote work initiatives all originate from the HR department. Additionally, these team members are still responsible for digitizing many activities that require a human touch—such as addressing concerns over job security or other sensitive topics.





## Create a centralized information center

If one thing is true in these uncertain times, it's that things are moving fast. Corporate initiatives and safety mandates can change on a dime. HR professionals are responsible for disseminating the most up-to-date information to worldwide staff at nearly the speed of light.

Give employees access to the latest alerts and announcements by creating an online repository accessible from anywhere in the world. At the click of a button, the right workflows can immediately update an online portal with the latest news and automatically send an email alert to inform employees. Instead of re-sending attachments and hoping employees are reading the latest version, HR can rest easy that the correct information is always available.

## Rapidly respond to vacation and time-off requests

During this current crisis, employee health is at the forefront of HR's chief concerns. Employees need a flexible and agile system for requesting sick time or other personal time-off requests. HR departments with prolonged or bottlenecked approval processes are feeling the stress.

Instead of dropping off paper copies of a time-off request or even trading emails back and forth, allow employees to submit requests through an online form. With the right workflows in place, a system can automatically route submissions to the right staff member for approval. Submissions can even arrive via email or text message, so HR staff can effortlessly approve or deny requests from any place on any device.

## Improve the remote onboarding process

Gone are the days when HR could meet for face-to-face interviews or with a new hire to review a physical handbook of policies and procedures. To mimic the rapport of an in-person meet-and-greet, HR professionals are turning towards video tools like Zoom and GoToMeeting. They also need to implement workflows that digitally deliver all of the appropriate resources and accessibility permissions to a new hire. Additionally, if a current employee transfers departments, HR can upgrade or adjust permissions with the click of a button.

## Support employees with humanized digital tools

The familiar "tap-tap" on your office door used to indicate an employee in-need. When working remotely, many employees are unfamiliar with their HR representative. With the right workflow in place, your system can automatically route employees into a Zoom with the correct human resource representative. Even though employees are unable to swing by for an impromptu chat, HR still needs the digital tools to address potentially sensitive employee concerns with speed and compassion.

# Digital initiatives to improve customer support teams

When it comes to monitoring customer satisfaction, support and success teams are at the heart of any organization. They are on the frontlines handling customer complaints and inquiries. Issues related to the pandemic have inundated customer service phone lines. Working from their kitchen counter or surrounded by screaming children, representatives are feeling the heat. The strain lengthens wait times and sends customers hunting for alternative ways to seek answers.



## Embrace self-service systems

Many industries still rely on in-person appointments to handle customer onboarding and problem resolution. The era of social distancing shuttered brick-and-mortar facilities, forcing banks, schools, and neighborhood-based insurance companies to find new ways to serve customers. Deploy digital forms that accept new account applications, class enrollment requests, or insurance quotes. Each form can trigger steps in an automated workflow, so it's automatically sent up the rung to the next step in your approval process.

## Accelerate cross-department activity

Nothing should come across your support desk without the assignment of a follow-up action item. Unfortunately, when organizations use lots of disparate systems, customer issues languish without answer. Using the right workflows in your customer service department, you can ensure tickets are instantaneously routed to the correct contact. Once a team member is assigned a ticket, the system can automatically track its progress from start-to-finish.

Sometimes a customer service ticket requires help from multiple departments. A system where all departments are connected can automatically trigger an alert, so an email is sent off to the appropriate salesperson or marketing team member.



## Link all of your customer service platforms

Extremely long wait times on the phone have driven customers to social media. Since COVID-19, many companies have reported a dramatic uptick in customer service inquiries received through platforms like Facebook Messenger, Instagram, and Twitter. While you may have team members assigned to man the phones or email inboxes, many companies are on radio silence when it comes to their social media interaction with customers. Ensure someone is not only responsible for monitoring these outlets, but that you have the processes in place to document and track incoming feedback and inquiries. With the right processes in place, you can automatically create support tickets from social media messages, and assign responsibility to the appropriate staff member.



# Why marketing teams need a digital refresh

How do potential customers learn about unknown products and businesses? Through creative and effective marketing outreach and promotion. Marketing teams work with many departments and across many mediums to deliver the answer to a very important question to your target audience—*why should I do business with you?*

Marketing is also a department hard hit by the implications of COVID-19, namely by stay-at-home orders that have shifted eyeballs 100 percent indoors.

The sudden shift created a deluge of online content, forcing marketers to find new, equally captivating ways to engage with their target audience—and do so with a remote team flung out of the creative energy of a shared war room and into isolated home offices.

At the heart of an effective marketing campaign, you'll find a balancing act of content development, content approvals, and internal processes required to get content out the door and into the minds and hearts of potential customers everywhere.

## Automate content approvals

Marketing is rife with approval processes—with mile-long lists of sign-offs required to launch a new campaign. Marketers coordinate ad creatives, curate copy for press releases, and produce video content for social media posts. Each campaign often requires the green light from a variety of cross-department heads, making the remote approval process almost as time-consuming as developing the content itself.

Instead of digging through old emails or spreadsheets to determine the progress of an approval, a centralized system can show a bird's-eye view of the entire process. Gripped by a looming campaign deadline? Easily see who is responsible for the next task or review. Once it passes one seal of approval, the entire package is sent off to the next approval rung, automatically sending your content through the process without any manual intervention. Automated workflows can get a new advertisement or commercial ready for launch in a fraction of the time as manual, email based processes.



## Design captivating online experiences

The pandemic launched a new wave of online experiences, namely via social media. Singers croon ballads over Instagram in lieu of live concerts. Yoga studios are still closed in most states, so instructors offer daily relaxation through streaming stretches. How can your organization leverage digital platforms to interact with customers in engaging new ways?

- Don't let the closure of restaurants, bars, and other venues limit social gatherings. Open doors on a digital diner and offer happy hours or cooking classes to schmooze key accounts over Zoom.
- Introduce your customers to a variety of influencers or industry experts they otherwise would not have access to. Host live interviews with relevant business gurus to position your company as a cutting-edge thought leader.
- Use social media to give your customers and fans a behind-the-scenes look at what makes your company unique. Many companies embracing the shift to remote work encourage their staff members to show off their workspaces and provide top tips for customers on how to remain productive when working from home.

These at-home experiences often feel more intimate and authentic than an over-produced content piece, and allow customers to connect with your business in new and interesting ways.

## Streamline website updates

Many digital marketing projects require a tight relationship between marketing and IT. When marketing has new web content ready to publish, IT must receive an immediate alert so they can get to work on the appropriate updates or push content from staging to production so it is live. The right workflows can automatically document any issues or bottlenecks, so deadlines are met with ease.



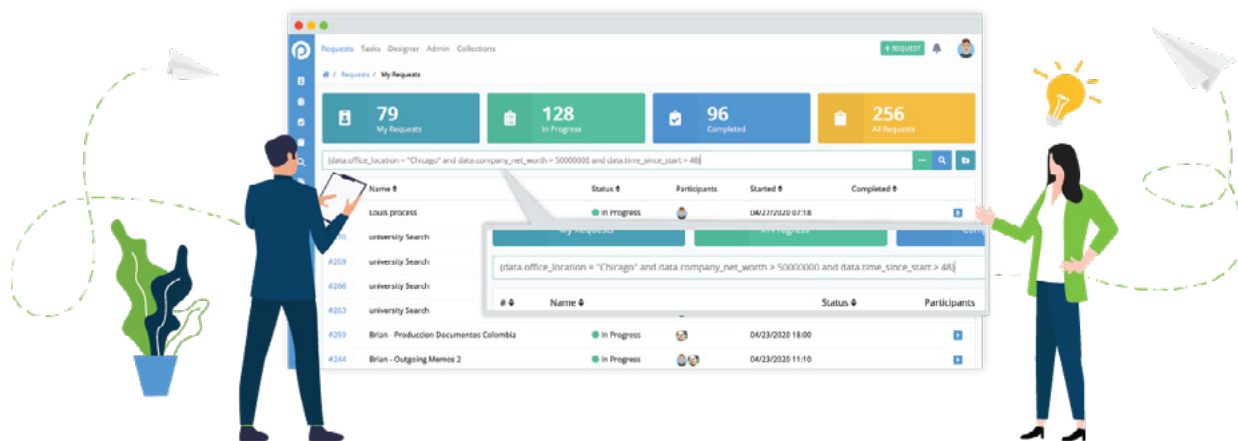
## Learn about your target audience

While many marketers used to rely on huge ad placements, live event sponsorships, stay-at-home orders decreased outdoor foot traffic to record lows. While many ad channels are struggling to survive, social media channels are experiencing a 20% uptick in usage. Similarly, PPC spending has seen similar trends. While industries like professional sports and travel have seen a precipitous drop in search traffic, terms like “buy online” have skyrocketed in popularity amongst stuck-at-home shoppers. The need to reach customers in the new ways they are searching for your business has increased the need for digital marketing campaigns.

Position your brand where consumer attention is at its highest, using digital marketing tools like email newsletters and social media ad campaigns. These are not only some of the top ways to get eyeballs on your brand, but they transport a trove of compelling consumer metrics right to your door. Learn what channels lead to the highest click-through rates to your website. Easily see what email subject lines elicit the most attention. Find out what ad imagery connects best with your target audience. Use this time of high internet use to gather the customer insights that will help your team create more effective advertising campaigns.

# How finance departments can use digital tools to survive the current crisis

If anything requires speed-of-light agility in business, it's the handling of finances. This need for speed has put the finance department at the forefront of mitigating many organization's COVID-19 responses. Using the right digital tools to determine a company's resilience, rein in cash management, and identify cost risks are central to creating a healthy business that can survive the current crisis.



## Shift money around quickly

The pandemic has forced financial teams across all industries to invest their creative juices into finding alternative cash sources they may not have considered in the past. This requires a comprehensive understanding of every function within an organization. Drawing on revolvers, requesting extended credit terms, and searching out coronavirus-related loans are some of the top ways organizations can stay solvent.

These new initiatives cannot take weeks or months to implement—organizations need access to cash

fast. Businesses are shouldering the burden of potential rent defaults and massive layoffs. Banks with outdated, monolithic software limitations were unprepared to process the applications and disbursements of much-needed funds. The banks best prepared to assist their communities had platforms that allowed them to quickly design and build new application forms and processes. With many small businesses clamoring for available loan sources, finance departments need to be able to submit applications quickly or risk missing out on much needed cash infusions.



## Conclusion

Perhaps it never felt like “the right time” to begin your organization’s digital transformation or kick it into high gear. Unfortunately, businesses no longer have the luxury of waiting. The fallout from the coronavirus pandemic forever changed the business landscape in almost every way, calling on every department to refresh its procedures, processes, and initiatives in order to survive.

Luckily, the ability to kickstart your digital transformation is easier than ever—and it will have a lasting positive impact on your business. By eliminating paper-based processes and reducing your reliance on face-to-face interaction, you will prepare your business to fight the implications of the pandemic head-on, and fortify your team against any future challenges.



# About ProcessMaker

ProcessMaker is low-code BPM and workflow software. ProcessMaker makes it easy for business analysts to collaborate with IT to automate complex business processes connecting people and existing company systems. Headquartered in Durham, North Carolina in the United States, ProcessMaker has a

partner network spread across 35 countries on five continents. Hundreds of commercial customers, including many Fortune 100 companies, rely on ProcessMaker to digitally transform their core business processes enabling faster decision making, improved compliance, and better performance.



Find out how we can elevate your business today. Learn more at [processmaker.com](https://processmaker.com)

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