

50 Business Processes to AUTOMATE

Think you are too busy to automate your business processes?

Process automation ranks as one of the top strategies to boost efficiency and revenue. With some analysts estimating an **astonishing 40-75% cost savings** for organizations that adopt automation technologies like these, there's no time to procrastinate. Here's how any organization or department can get started with automation today.

STREAMLINE FRONT AND BACK-OFFICE OPERATIONS

90%

of manually updated spreadsheets contain errors.² Boost accuracy of your recordkeeping by using RPA to eliminate error-prone copy and pasting tasks.

Reduce revenue-draining paperwork. U.S. companies lose **\$120 billion per year** just by sticking to poorly managed paper-based forms.³

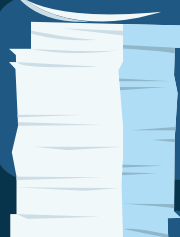


9 of 10 workers fail to complete their to-do list each day. Automate repetitive tasks to clear the way for more high-value projects.¹



Banish

pencil bookkeeping and overstuffed filing cabinets. Digitize all of your records so employees can always find what they need.



Hard-copy printed invoices cost an average of **\$30 to process**.⁴ Reduce the costly strain on your accounting team by digitizing your workload.

Transform wet signatures into digital e-signatures. Easily sign-off on requests and approvals without leaving your email inbox—even from your phone while on-the-go.



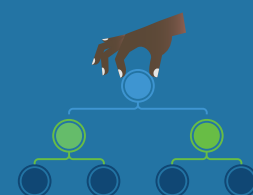
ATTRACT AND RETAIN TOP TALENT WITH HR AUTOMATION

Hiring managers spend of their time on toilsome admin tasks. Teach machines how to take the reins of repetitive tasks so your top HR talent can focus on more valuable projects.⁵

73%



Time management experts estimate that employees **waste 40,000,000 hours each month** laboring over HR forms like expense reports and time-off requests. Slash time expenditure down to mere seconds with smart, automated forms.⁶



Always left scratching your head, trying to uncover how a departed employee conducted their day? Map and manage every critical workflow for a crystal clear record of internal processes.

I GOT THIS.



Losing out on rockstar hires due to long internal wait times?

Expedite your hiring process by automating pre-screening, applicant tracking, and offer management.

Retain your best employees by auto-scheduling employee reviews—**over half of top-performing employees** quit because they're never given the chance to discuss growth opportunities.⁷



Automate distribution of onboarding materials to create a highly structured process.



45% of employees

trust organizations with an organized onboarding procedure.

¹ https://www.huffpost.com/entry/majority-of-people-dont-finish-daily-to-do-lists_n_1586796

² <https://www.zdnet.com/article/excel-errors-microsofts-spreadsheet-may-be-hazardous-to-your-health/>

³ <https://www.upstate.edu/green/pdf/tg-news/tg-news-summer-2016.pdf>

⁴ <https://www.globenewswire.com/news-release/2020/03/10/1997803/0/en/Global-14-4B-Business-Process-Management-BPM-Market-2020-2025.html>

⁵ <https://www.cfo.com/leadership/2012/03/do-your-hr-leaders-spend-enough-time-on-strategic-partnership>

⁶ <https://hrxexecutive.com/hres-number-of-the-day-time-wasted-on-hr-tasks/>

⁷ <https://www.gallup.com/workplace/247391/fixable-problem-costs-businesses-trillion.aspx>

⁸ <https://www.hrtechnologist.com/articles/recruitment-onboarding/4-reasons-to-automate-employee-onboarding/>

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Part 2. Think you are too busy to automate your business processes? Go see part 1 first.

TAKE ADVANTAGE OF NEXT-GEN MARKETING STRATEGIES



Marketing pros herald 'personalization' as their most powerful revenue generator. Using BPM tools, you can **craft hyper-targeted marketing messages** to lure a new batch of customers.



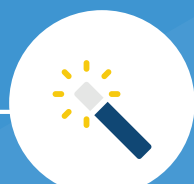
Take advantage of **hot marketing trends** like webinars. Use automation to organize invites, distribute resources, and manage follow-ups with attendees.



Marketers spend a third of their time trudging through mundane and repetitive tasks. **Automate internal initiatives** so your team can focus on building more creative campaigns.

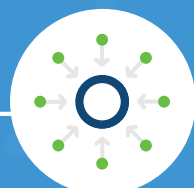


Personalized email marketing generates 18X more revenue than one-size-fits-all mass messaging. **Tailor your email content** using high-performing automated strategies like lead magnets and drip campaigns.

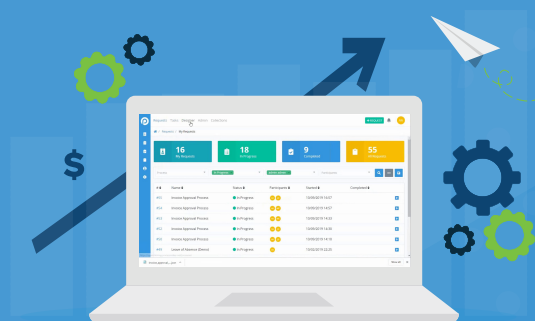


End the practice of chasing down manual sign-offs for new website or ad content. **Automation** dispatches approval requests up the ladder, sends reminders, and logs final signatures.

Turn free trial users into paying customers. Platforms that merge platform activity and automated follow-up strategies achieve a **40-60% conversion rate from free trial users**.



Keep track of customer complaints by **centralizing all interactions** from phone calls, emails, and social media into a singular profile.



Empower your sales team to do what they do best—sell. Reps lose 5 hours of every 8-hour day trudging through non-revenue generating tasks.⁹

That's 62.5% of the work day.



ALERT!

Increase cross-selling opportunities by setting up automated alerts to signal important opportunities.

Mobilise RPA bots

to scour the internet and pre-fill CRM profiles with key outreach data.



Let RPA bots fill in final contracts and SLA agreements. Free your sales staff to focus on pursuing the next big customer.



RPA can mine your database to curate customer behavioral data into a list of sizzling hot leads.



Rally your sales staff with **real-time insight** into goal progress.



NEVER MISS ANOTHER SALES OPPORTUNITY



50 Business Processes to AUTOMATE

Part 3. Think you are too busy to automate your business processes? Go see part 1 & 2 first.

PROVIDE STELLAR CUSTOMER SERVICE



1 of 3 customers

SWITCH COMPANY

will consider switching companies after just one subpar support interaction.¹⁰ Using automation, you can dramatically improve customer wait times.

Enlist chatbots to answer easy questions.

Clear the queue at the support desk so reps can spend more time delivering a spectacular service experience for customers in dire need.

IMMEDIATELY

connect important clients with the right support personnel.

Automatically aggregate

customer satisfaction surveys without the need for manual review.

PLEASE RATE YOUR SATISFACTION WITH THIS CHAT. WAS IT HELPFUL?



Use artificial intelligence to rank the urgency of inbound customer calls.

When a customer wants help, they want it now.

75% of customers

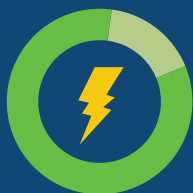
expect a resolution in five minutes—no matter the time of day. Using RPA, virtual agents and chatbots can help lighten the load.

NOW PLZ

BOOST BANKING BUSINESS WITH AUTOMATED WORKFLOWS

Almost three-quarters of consumers

think complex banking functions like account opening and mortgage refinancing should be near instantaneous.¹¹ Satisfy consumer demands for speed with lightning-quick automated approval processes.



Recruit the help of **artificial intelligence** to accurately assess risk and provide competitive pricing during the credit approval process.

At your service!



Never miss another policy change. With a

well-oiled workflow

in place, you can make rapid updates to your systems to always stay up-to-date on regulatory requirements.

Accelerate traditionally protracted wealth management steps like **funding and activation.**



Enlist the help of RPA bots to fast track Know-Your-Customer (KYC) Checks.

Trim multi-step, time-consuming manual inspections down to a matter of minutes.



Anti-Money Laundering strategy

RPA bolsters your **Anti-Money Laundering strategy** by scanning all account behavior for fraudulent activity in real-time.



Capture new clients by **offering convenient account access** on PC, smart watch, mobile, tablet, or however your customers wish to manage their financial info.



Mitigate regulatory risk by **removing the middleman** of manual data handling. Automation reduces human error and boosts overall compliance



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Part 4. Think you are too busy to automate your business processes? Go see the first 3 parts.

CRAFT A REMARKABLE HIGHER EDUCATION EXPERIENCE

Automate the student enrollment process with easy-to-fill online forms.

Backend systems automatically populate key databases and alert the right parties of important updates.

Boost graduation rates by proactively monitoring degree progress. **Automated alerts** can inform students of missing classes, opportunities to retake courses, and provide an action plan for graduation.

Deliver important requests for transcripts in record-time. RPA can automatically select the correct template and populate form fields without human interference.

Automation tech like **data extraction and artificial intelligence** can quickly weigh financial aid options. Impress incoming students by providing this important enrollment factor quickly.

Centralize scheduling so students can set appointments with any staff member through a single web portal.

AUTOMATION AT WORK IN EVERY INDUSTRY

Reduce downtime of expensive machinery.

Prescriptive maintenance helps equipment diagnose potential issues in advance of a costly failure.

Automated workflows can review equipment purchase requests for employees working from home.

Create rules to automatically approve requests below a certain cost threshold and set alerts to inform managers of outliers.

Generate custom quotes quickly.

Automated workflows review customer needs and populate estimates in no-time.

Eliminate labor-intensive copy-and-paste tasks by using RPA to generate weekly or monthly reports.

Keep your business running smoothly.

In-depth workflow dashboards highlight opportunities for change, so you're always improving your systems.

Unite global inventory operations into a single dashboard.

Provide excellent customer service with real-time insight into product availability.