



# The Essential Buyer's Guide to **Workflow Automation**

This guide serves as a business primer for workflow automation and outlines the important buying criteria to help you select the best workflow automation solution for your business.

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# WORKFLOW AUTOMATION: A BUSINESS PRIMER

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***“It’s no longer just what you do that counts. It’s how you do what you do – and how quickly you can modify your business processes to take on new opportunities and challenges – that’s really important.”***

- Andy Mulholland, Jon Pyke, and Peter Fingar, “Enterprise Cloud Computing – A Strategy Guide For Business and Technology Leaders”

The business value that can be realized from workflow automation is much more than higher efficiency, better time management, and a higher level of organization. The core competency of a company lies in how it operates and serves its customers relative to its competitors, and workflow lies at the heart of a company’s operations. Workflow automation has the potential to help companies get ahead and stay ahead of their competitors by constantly improving everyday processes.

## THE BUSINESS VALUE OF WORKFLOW AUTOMATION

If your organization is considering a workflow automation solution, you have likely reached the stage where you are getting bogged down with inefficient processes. Poor governance is leading to poor decision making, poor customer satisfaction is leading to customer attrition, and the inability to keep pace with the market and competition is resulting in declining profits.

Organizations that successfully improve their workflow and adopt a workflow automation solution realize most or all of the following business benefits:

- **Less need for paper-based processes:**

The benefits from automating document-intensive processes cannot be overstated. The use of paper remains pervasive across many industries, resulting in high administrative costs and too many points of failure as documents are routed through the organization. According to reduce.org, the average office worker uses 10,000 sheets of copy paper each year and the costs of using paper in the office can run up to 31 times the cost of purchasing the paper in the first place. Replacing paper-based forms with electronic forms that can be tied to an automated business process can have an immediate impact on your bottomline.

- **Faster throughput of work:**

Business users typically engage in two types of work – repeatable/routine work and special/one-off projects. They often use the same approach to both types of work, namely using documents, emails and phone calls to collaborate with each other to get things done. While it may be fine to use this approach for one-off projects, it is a time killer for repeatable work. Workflow automation can help businesses realize untapped efficiencies by improving the speed at which repeatable work flows through the organization by getting the right task to the right people at the right time.



- **Higher quality of work:**

Attention to detail coupled with periodic reviews lies at the heart of quality work. By having a process that takes this into account and automating the process so that nothing slips through the cracks, businesses can ensure that the products and services they provide are fit for use by the customer.

- **Improved governance and compliance:**

Business executives are constantly under pressure to make sure that individuals and departments are working toward company objectives and that they are complying with regulatory requirements at all times. Using a workflow automation system helps them understand how processes are working, where the bottlenecks are and how processes should be changed to improve efficiencies. Automated workflows keep an electronic trail of business processes, and the records can be accessed at any time to address any compliance requirements.

- **Quickly adapt to changing market conditions:**

In order to quickly adapt to changing market environments, businesses often need to make changes to the way they work, i.e. change their business processes. If the process change only occurs on paper, it doesn't mean the users have adopted it. A workflow automation solution can be quickly re-configured to reflect the new process by empowering business users to make the required changes rather than relying on IT for every change or every process.

## INDUSTRY TRENDS SHAPING THE FUTURE OF WORKFLOW AUTOMATION

A number of technological innovations are shaping the way we live, work and do business. The key trends to consider when assessing a workflow automation platform include:

- **Cloud/SaaS:**

Cloud/SaaS has allowed companies to collaborate with customers and partners in new ways, and collaboration is the key to gaining competitive advantage across the value chain. In addition, companies are realizing the economic advantages of the SaaS model, wherein they can avoid large upfront capital expenses for hardware and software in exchange for lower annual subscription costs. Risk is also reduced since SaaS implementations are faster to deploy and business value can be proved more quickly through a trial or proof of concept.

***"The rise of the Cloud is more than just another platform shift that gets geeks excited. It will undoubtedly transform the IT industry, but it will also profoundly change the way people work and companies operate."***

- "Let It Rise," The Economist



- **Web 2.0 and User Experience:**

Web 2.0 is an emerging usage pattern wherein people can collaborate and interact in contrast to non-interactive Web 1.0, where users are limited to passive viewing of information provided to them. Web 2.0 has led to a more “self-service” culture in companies where the business users are empowered to get work done efficiently.

***“With the advent of easy-to-use “Consumer IT” or Web 2.0 usage of the Internet, Social Networks are changing the ways we live, learn, collaborate, work, consume and play.”***

- Andy Mulholland, Jon Pyke, and Peter Fingar, “Enterprise Cloud Computing – A Strategy Guide For Business and Technology Leaders”

- **Mobile:**

Businesses are seeing a shift from a data- and computer-centric world to a people- and communication-centric world, with an explosion in the use of smartphones and tablets. Mobility isn’t just about making an application available on the web. It is about being in touch with constantly changing circumstances and directing activities wherever you are.

***“By 2018, more than 50% of users will go to a tablet or smartphone first for all online activities.”***

- Ken Dulaney, Van L. Baker, et al., “Predicts 2015: Mobile and Wireless,” published November 2014, Gartner Research

- **Digital Business Transformation:**

Digital technologies like cloud, mobile, social, and big data analytics are driving companies to rethink their key business processes with a goal for reinventing them, not just improving them. Integration of data and business processes has become a prerequisite. Logging into disparate business applications that handle CRM, ERP, HCM, etc. and using email and documents to “connect” them in an ad-hoc manner is no longer cost-efficient or feasible.

***“Digital business presents tremendous opportunities for innovation and competitive advantage. Creating this value requires a complete rethinking about the work itself.”***

- Janelle B. Hill, Bruce Robertson, “Rethink ‘Work’ to Unleash The Value of a Digitalized Process,” published August 2014, Gartner Research

These industry trends should be factored into your organization’s business requirements to provide a comprehensive framework to select a workflow automation vendor. In the next section, we’ll look at business justification and ROI and common criteria organizations use to evaluate vendors.



# SELECTING THE RIGHT WORKFLOW AUTOMATION SOLUTION FOR YOUR ORGANIZATION

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**“Confronting demands to deliver customer-facing applications quickly and efficiently, some firms are seeking alternatives to custom coding on application platforms that rely heavily on Java and .NET programming. As they do, these enterprises favor “low-code” platforms over their established application platforms.”**

- Clay Richardson, John Rymer, “Five Customer-Facing Scenarios Shape ‘Low-Code’ Platform Choices,” Forrester Research, September 2014

## BUSINESS JUSTIFICATION AND ROI

Developing a business justification and ROI model for a workflow automation solution is important once the main business drivers have been identified. This process ensures that executives have a way to measure the benefits of the new workflow automation solution and can evaluate the ROI of the required investment. Presenting a compelling business case can also help secure budget approval from the CFO.

Nintex commissioned a study with Forrester Consulting on the Nintex workflow platform\* and the results are for a composite organization. The study found that workflow automation tools improved business user productivity by 8% - 15% depending on the organization. Even though your projected ROI will be based on assumptions and estimates, this exercise will generate a valuable dialogue with executives and stakeholders around the business justification of a workflow automation solution.

The Forrester Consulting Total Economic Impact™ (TEI) methodology provides one way to assess the ROI of a workflow automation solution. Common measurable benefits for a workflow automation solution include:

- **Increased productivity through streamlined and automated workflows**
- **Cost savings due to a reduction in paper-based processes**
- **Improved scalability and adaptability of business processes**
- **Increased visibility and business focus on day-to-day operations through reporting and analytics**
- **Higher customer satisfaction scores**

An example of a Total Economic Impact™ (TEI) evaluation is available on the Nintex website. The evaluation concluded that the three-year risk-adjusted ROI of the Nintex workflow platform is 176% with a breakeven point (payback period) of less than 11 months after deployment.

\*The Total Economic Impact™ Of the Nintex Workflow Platform, a commissioned study conducted by Forrester Consulting on behalf of Nintex, October 2014.





## VENDOR SELECTION CRITERIA

### A. Deciding What Is Important

We recommend ranking the four to five critical success factors for your organization and mapping these to the selection criteria to guide your development of a vendor comparison matrix. Here are critical success factors that you should consider:

Critical Success Factor	Selection Criteria
Ability to automate everyday business processes	<b>Functionality:</b> Workflow automation, electronic forms <b>Usability:</b> Business-friendly workflow and forms designer, library of common workflow actions, configuration-driven integrations/connectors <b>Professional Services:</b> Workflow automation consulting
Rapid deployment and adoption	<b>Usability:</b> Simple, intuitive web-friendly and mobile-friendly interface <b>Technology:</b> Web-based, flexibility to deploy on-premises, in the cloud, or both, mobile apps <b>Extensibility:</b> Ability to extend out-of-the-box capabilities using low code customizations
Ability to connect to content repositories and business applications	<b>Functionality:</b> Standards-based, configuration-driven connectors <b>Usability:</b> Drag and drop connectors into workflows and configure on the fly.
Proven ROI	<b>Customer Evidence:</b> Customer references that can validate and relate to your business needs <b>Independent ROI analysis:</b> An independent ROI study that proves the value of the workflow solution
Improved visibility into everyday processes	<b>Functionality:</b> Status reports and dashboards <b>Usability:</b> Web-friendly and mobile-friendly reports <b>Extensibility:</b> Export data to Business Intelligence applications for further analysis

Agreeing on the critical success factors will help prioritize the important aspects of a vendor evaluation, such as usability, configurability and professional services, that can significantly impact your workflow automation initiative.

### B. Developing a Vendor Comparison Matrix

An example vendor comparison matrix is included in the Appendix. This matrix is not intended to be exhaustive, but includes frequent selection criteria and dimensions utilized by organizations. If the scores are close for two or three vendors, reviewing qualitative feedback and revisiting the critical success factors can be useful to make the final selection.



# EVALUATING NINTEX'S WORKFLOW PLATFORM

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Nintex is the world's leading workflow company. We deliver innovative software and cloud services to help organizations automate everyday business processes quickly and easily. More than 5,000 public and private organizations in 90 countries, including 200 of the Fortune 500, run millions of Nintex workflows daily. Our network of more than 1,000 reselling and service partners deliver integrated workflow solutions, from simple to complex, addressing the needs of business users, developers, IT professionals — everyone. Our workflow platform automates processes on and between today's most used enterprise content management systems and collaboration platforms, connecting on-premise, cloud workflows, and mobile users.

We would welcome the opportunity to discuss your business needs and demonstrate our unique approach to workflow automation. We are happy to offer the following services:

- **A business requirements discussion with one of our process automation experts and our partners**
- **Solution demos and proof of concepts tailored to your requirements**
- **A comprehensive response to your RFI/RFP**
- **Customer testimonials**

## NEXT STEPS

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Please contact us (<http://info.nintex.com/ContactUs.html>) to discuss your requirements in detail. We can also be reached at any of the following locations:

### **Americas**

Plaza Center  
10800 NE 8th Street, Suite 400  
Bellevue, WA 98004  
United States  
+1 (425) 324 2400

### **Asia Pacific**

Level 15, 595 Collins Street  
Melbourne, Victoria 3000  
Australia  
+61 (0) 3 9912 1800

### **Europe, Middle East and Africa**

Level 4, 36 Broadway  
London SW1H 0BH  
United Kingdom  
+44 (0) 20 3693 0200

### **Malaysia**

Suite 8-3  
Level 8, Menara Cimb  
Jalan Stesen Sentral 2  
KL Sentral  
Kuala Lumpur 50470  
Malaysia





## APPENDIX: SAMPLE VENDOR COMPARISON MATRIX

This sample vendor comparison matrix contains five key dimensions and 100+ criteria. Dimensions and criteria can be added or removed based on your business needs. Assign each vendor a score between 0% and 100%. To complete the matrix, complete the following steps:

1. For each dimension, assign a weight based on importance. The total for all dimensions should equal 100% (see example below).
2. For all criteria in the vendor scoring matrix, assign a score based on the following:
  - Criteria completely met OOTB (4 points)
  - Criteria completely met with customization (3 points)
  - Criteria partially met ( 2 points)
  - Criteria not met ( 0 points)
3. Calculate the maximum score for each dimension by multiplying the number of criteria in a dimension by 4. For instance, if the Vendor Qualifications dimension has nine criteria, the maximum score is 36. Total the scores for the criteria in each dimension and divide the maximum score to give a percentage score for each dimension. For example, if a vendor scored 18 in the Vendor Qualifications dimension, the percentage score would be  $18/36 = 50\%$ .
4. Transfer the percentage score (S) for each dimension to the summary table and multiply the weight (W) for each dimension to calculate the total column (S\*W). Add the total column for the final vendor percentage score.

## SAMPLE VENDOR SCORING SUMMARY

DIMENSION	WEIGHT (W)	SCORE (S)	TOTAL (S*W)
Core Workflow Functionality	40%	90%	36.00%
Pricing	20%	92%	18.40%
Professional Services and Support	20%	90%	18.00%
Vendor Qualifications	10%	90%	9.00%
Technology	10%	90%	9.00%
Final Vendor Score			90.4%



# APPENDIX

## Sample Vendor Scoring Matrix

DIMENSION	CRITERIA	SCORE	NOTES
<b>1. Core Workflow Functionality</b>			
1.1 Workflow and Forms Designer			
	Seamless embedding within SharePoint user interface		
	Easy drag-and-drop design approach		
	Guided, assisted design (auto-layout, auto-draw)		
	No formal developer skills required		
	No formal business process management (BPM) expertise required (e.g., BPMN, which has a 250-page manual)		
	More functionality available commensurate with greater skill levels		
	Templates		
	Workflows can be used inside of other workflows		
	Versioning of process models		
	Model-based (engine takes instructions but does not require code to be generated)		
	Import/export of process models		
	Support for sequential/linear process models		
	Support for stage-based (i.e., state machine) process models		
	Integrated, context-sensitive help		
	Printable process models		
	Processes can call and communicate with other processes		
	Reference data can be stored independently of process models (e.g., constants, lookups)		
	Roles (e.g, manager, initiator, most recent reviewer)		
	Regular expressions		
	Date, number, text manipulation		
	Conditional start logic		
	Expand/collapse parts of process models for high-level/de-tailed viewing		
	Custom form validation logic		
	Conditional formatting of controls and forms		
	Design custom layouts for different browser form factors		
	Design custom layouts for different native mobile apps		
	Preview forms before publishing		
	Custom forms for SharePoint data (e.g., lists, document properties)		



DIMENSION	CRITERIA	SCORE	NOTES
1.1 Workflow and Forms Designer (continued)			
	Custom forms for process steps (e.g., launch, tasks)		
	Form design integrated with process design		
	Customize forms using CSS and JavaScript		
	Cascading list lookups (e.g., a selection of an item in one list filters the available choices in another list)		
	Task forms can combine task information with process variables and data from other sources (e.g., lists)		
1.2 Participant/User Experience			
	Receive notifications via email		
	Complete tasks via email replies		
	Receive notifications via Lync messages		
	Complete tasks interactively via Lync chats		
	Query Exchange calendars and create appointments		
	Query and manipulate Exchange tasks		
	Customizable email templates		
	Anonymous forms that can be submitted by public users		
	Repeating sections		
	Participate from a mobile phone's web browser		
	Participate via native mobile apps		
	Native mobile apps can operate while offline		
	Submit new forms via native mobile app		
	Complete tasks via native mobile app		
1.3 Manageability and Governance			
	No third party plugins required		
	No desktop install		
	Support for staged deployments (e.g., from development to testing to production)		
	Custom logging of workflow telemetry		
	History and log information accessible by third-party business intelligence products and techniques		
	View workflow progress graphically		
	View workflow progress as audit log		
	Workflow statistics across multiple instances, points in time		
	Workflow design privileges can be restricted to specific users		
	Individual workflow tools/activities can be restricted to specific users		
	Scheduled, repeatable workflow execution		
	Customizable holidays and business hours		
	Support for SharePoint-managed metadata in forms		
	Bind form fields to SharePoint list/library columns		



DIMENSION	CRITERIA	SCORE	NOTES
	Unbound form field values can still be saved/retrieved		
	Distribution of customized native mobile apps via mobile device manager (MDM)		
	Mobile devices can directly communicate with SharePoint servers		
	Mobile devices can communicate with SharePoint servers via secure relay		
	Mobile devices can authenticate via Microsoft accounts		
	Mobile devices can authenticate via Office 365 user IDs		
	Native mobile app for iOS (iPhone and iPad)		
	Native mobile app for Android (phones and tablets)		
	Native mobile app for Windows Phone		
	Native mobile app for Windows 8.x (modern UI)		
1.4 Connectivity and Integration			
	Integration with SharePoint site collections, sites, lists, and libraries		
	Processes can span multiple SharePoint sites		
	Processes can span multiple SharePoint site collections and web applications		
	Processes can span multiple SharePoint farms		
	Provision Active Directory users/groups/group memberships		
	Provision Exchange Server mailboxes		
	Provision Lync Server privileges		
	Integration with SharePoint claims-based authentication		
	Technical support for each user during business hours via web portal, email, and phone		
	Integration with SharePoint list/library item context menus		
	Geolocation fields that detect current position (subject to device support)		
	SOAP web services		
	Provide an SLA for support response times		
	REST web services		
	WebDAV repositories		
	Integration with BizTalk Server		
	Integration with cloud content stores (e.g., DropBox, Box, Google Drive)		
	Integration with Salesforce.com		
	Integration with Microsoft Dynamics CRM (both on-premise and online)		
	Integration with DocuSign		
	Integration between on-premise and online processes		
	Integration with Yammer		
	Integration with popular social media services (e.g., Twitter, Facebook, LinkedIn)		



DIMENSION	CRITERIA	SCORE	NOTES
1.5 Extensibility			
	Custom workflow activities can be created with code		
	Custom workflow activities can be created without code		
	Custom roles		
	Custom formulas		
	Custom reports		
	Custom pages		
	Custom form controls		
	Custom web services can be registered with online catalog		
2. Pricing			
	Pricing for a <x server deployment/y subscriber deployment/z workflow deployment)		
	Pricing for implementation services		
	Pricing for training and ad-hoc services post implementation		
3. Professional Services and Support			
	The tool should have a minimum of training requirements, allowing relatively inexperienced users to build forms and workflows with a minimum of experience		
	Implementation methodology and process		
	Quick Implementation timeframe		
	Range of best practices services		
	Solutions consultant's experience		
	Solutions templates		
	Provide web-based training		
	Offer on-site training; support for train-the-trainer methodology		
	Technical support for each user during business hours via web portal, email, and phone		
	Option for a dedicated technical support account manager		
	Post implementation optimization and/or coaching services		
	Offer after-hours support		
	Provide an SLA for support response times		
	Community forum and product feedback center		
	Online knowledge base		
4. Vendor Qualifications			
	Financial viability, including profitability/cash flow		
	Vision and strategy		
	Standard terms and conditions		
	Executive management		
	Number of years in business		
	Size of customer base/subscribers?		
	International presence		
	Customer references		
	Partner network		



DIMENSION	CRITERIA	SCORE	NOTES
5. Technology			
	Uptime statistics for past 24 months		
	Provide documented technical architecture diagrams		
	Security and data center certification		
	Provide documented Disaster Recovery Plan		
	Provide up-time guarantees (e.g. 99.7%)		
	Regular release schedule		
	Server redundancy to support the business continuity plan		
	Off-site storage of tape backups		

