Intelligent Operations

How to deploy and scale digital and process automation to transform operations for today and tomorrow.

Put It Forward

> **End-to-end performance management and visibility connect data sources for end-to-end transparency and to facilitate the management of operational metrics for suppliers and employees. More broadly, establishing end-to-end visibility across operations can yield insights that drive strategically important decisions, while also reducing response times by accelerating root-cause analysis into problems.**

McKinsey: Rethinking operations in the next normal - 2022

Put It Forward

Short on time - Read This:

- Operations Teams need help with digitization, AI, process automation and tech enablement.

- Lack of resources, disparate systems, access to connected data and easy-to-use powerful technology make it impossible for operational leaders to improve margins, reduce costs and better serve and anticipate customer needs.

- Intelligent Automation Platform offers an alternative to current challenges, manual processes and disconnected insights that are cost-effective, easy to use and deploy.

- **These playbooks and blueprints** show you how.

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The Operations Landscape & Drivers

People, Technology, Processes and Collaboration are compromised, blind and operationally fractured.

Current Challenges

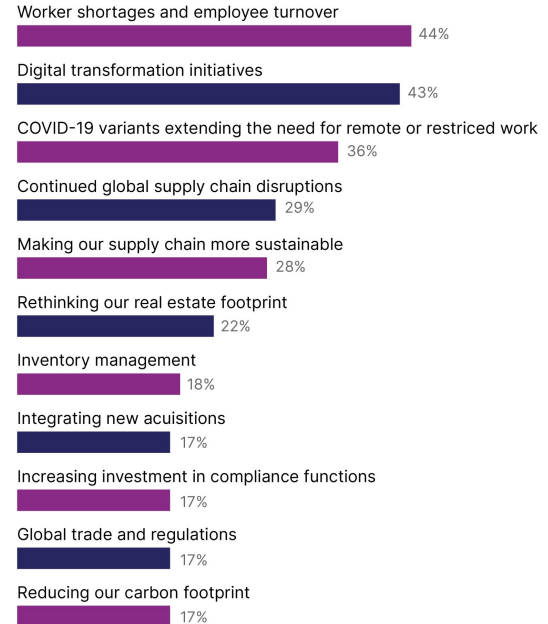# Automation = Create Insights for all across the enterprise

To become a top performing operations team you can't just integrate data - you have to automate processes, surface deep insights, serve them up to front-line staff across enterprise to drive collaboration to realize business outcomes.

Within the context of customer experience these last three years, organizations have a significant responsibility: to offer customers personalized experiences.

Operators must drive operational excellence and innovation to adapt seamlessly to ongoing and upcoming disruptions. Although businesses continue to endure challenges such as gaps in hybrid work strategies, growing cybersecurity threats, poor operational efficiency, surging supply chain complications, and poor customer trust, exploring new strategies, investing in modern technological solutions, and enhancing communication and collaboration will make it possible for operators increase their market share while maintaining their margins.

The challenge operations has is integrating data & disparate systems, automating and generating deep insight to spur action to run a more effective and efficient operations.

An array of challenges await COOs

Challenge	%
Worker shortages and employee turnover	44%
Digital transformation initiatives	43%
COVID-19 variants extending the need for remote or restriced work	36%
Continued global supply chain disruptions	29%
Making our supply chain more sustainable	28%
Rethinking our real estate footprint	22%
Inventory management	18%
Integrating new acuisitions	17%
Increasing investment in compliance functions	17%
Global trade and regulations	17%
Reducing our carbon footprint	17%

Q: What are the biggest operations challenges you expect to face in 2022?
Source: PwC Pulse Survey, January 27, 2022: COO base of 99

Quote-to-Order (Q2O)

The Quote-to-Order (Q2O) process encompasses everything your business needs to do from when a potential customer is given a quote for your product or service until a purchase is made, the product or service is delivered and payment is collected. While this may look different across industries and business types, the Q2O process involves many intricate steps.

Broken business processes—marked by manual workarounds, downtime, and errors—are all too common. Many businesses write off this waste as "the cost of doing business." Quote-to-order (Q2O) is a business process involving generating a sales quote for a customer and converting it into an order. The process involves many different moving paths and is riddled with inefficient processes, resulting in errors, delays, penalties, increased costs and ultimately, a negative customer experience.

52% of business leaders believe that 10-30% of their daily tasks can be automated.

McKinsey: "The imperatives for automation success", cited February 2023. (Source)

97% of organizations believe that business process automation is essential for digital transformation, while 90% of employees feel burdened with repetitive tasks and 68% of employees suffer from work overload.

Cflow: "Compelling Workflow Automation Statistics for Data-driven Business Decisions", cited February 2023. (Source)

Challenge #2

IT Ops - Doing Much More with Much Less

IT operations are under constant pressure to deliver more with less, and that's not abating. Businesses depend more than ever on IT to come through as they turn to digital transformation to survive and compete. New technologies, as well as broader organizational shifts, have hugely expanded the importance of delivering effective IT services - as well as complicating it. Similarly, the exploding demand for transformation solutions reflects both the potential dividends of digitalization and the risks associated with ineffective or outdated technology.

Weak IT operations processes can negatively affect the quality of IT services and other business processes, undermining an organization's competitiveness and reputation. Therefore, it's crucial with scarce IT resources that IT ops focus on improving business processes and ensuring operational stability through automation platforms. In addition, automating key IT Ops processes provides substantial IT operations that help a company refine its business processes to quickly adapt to shifting customer needs and competitive activities and free up IT resources to work on value-added transformational activities.

76% of respondents believe that the complexity of the IT landscape is the biggest barrier to productivity among IT operations teams.

The Impact of Automation on IT Operations, Freeform Dynamics (for Fujitsu)

Delivering Customer and Employee Experiences

Excellent, consistent, omni-channel customer service is a key differentiator. But to provide that level of customer service, you need the right tools. Specifically, you need an intelligent platform that can integrate systems and data, automate processes, provide self-service options and deliver insights to help customer support teams provide the best experience.

How can organizations deliver value-driven service and support to improve operational excellence, uncover growth options and leverage customer data and analytics for contextualized, predictive, value-focused and ubiquitous experiences? How can organizations optimize the entire customer operations footprint using tech to measure performance, identify opportunities, and deploy value-capturing change management to deliver critical operations insights and impact at scale?

Key priorities for 2023+ are improving operations, growing the business, and executing business transformations while answering the question, "How do we create a better, more personalized experience through digitally enabled services?"

Gen Z (46%), Gen X (53%) and Baby Boomers (60%) indicated that real-time help powered by AI has the most positive impact on how they view a brand and is most likely to grow their loyalty.

Millennials are also serious about automation, as 72% are likely to make repeat purchases and 71% are likely to recommend a brand if it uses AI to improve their customer experience.

From Boomers to Gen Z, All Generations Agree a Negative Customer Experience is Worse Than A Bad Product - Telus International
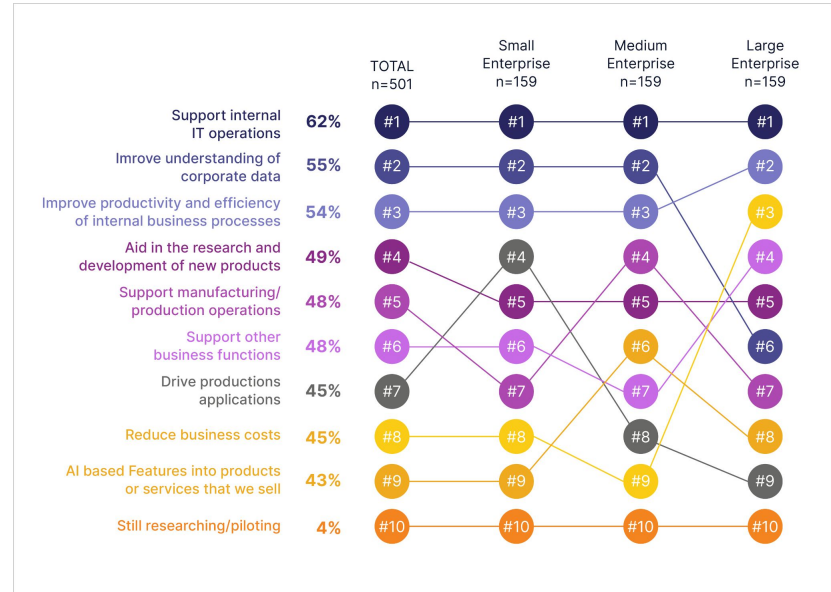
Finding the Right Solution

Put It Forward

Intelligent Operations creates real-time insights, delivers more value and unlock more growth opportunities for all operators.

Insights for better decision-making require analytics to be part of how people work.

Intelligent Automation (IA) solves this barrier to high-quality decisions. It's a modern insights technology that combines predictive analytics, process and human-in-the-loop decision support. The best part is this technology is designed for people to be easy to use, turning your employees into business movers.

	TOTAL n=501	Small Enterprise n=159	Medium Enterprise n=159	Large Enterprise n=159
Support internal IT operations	62% #1	#1	#1	#1
Imrove understanding of corporate data	55% #2	#2	#2	#2
Improve productivity and efficiency of internal business processes	54% #3	#3	#3	#3
Aid in the research and development of new products	49% #4	#4	#4	#4
Support manufacturing/ production operations	48% #5	#5	#5	#5
Support other business functions	48% #6	#6	#6	#6
Drive productions applications	45% #7	#7	#7	#7
Reduce business costs	45% #8	#8	#8	#8
AI based Features into products or services that we sell	43% #9	#9	#9	#9
Still researching/piloting	4% #10	#10	#10	#10

Frevvo.com - 75+ Key Business Automation Statistics

Streamline Q2O and Increase Revenue and Improve Margins

Intelligent Automation can streamline the Q2O process by automating key processes, such as collecting customer information and preferences, generating detailed customer quotes, sharing them with stakeholders for contract approval, and generating orders from signed contracts, product tracking, order management, billing and shipping, thus freeing up valuable resources.

With Intelligent Automation operators will create a consistent, repeatable set of automated business processes using low-code tech to integrate and automate Q2O applications to fully:

- Reduce costs by up to 35% through reductions in quote and order errors
- Increase orders processed per employee by 15%
- Faster processes and reduced turnaround times –
- Reduce order cycle time by up to 35% –
- Reduce customer inquiries and collections by 20-25% initially, rising to 50% later
- Increase accuracy and completeness of order data by 45-50%, rising to 90% later
- Improve visibility of customer profiles, buying patterns and promotional adoption
- Identify up-sell and cross-sell opportunities
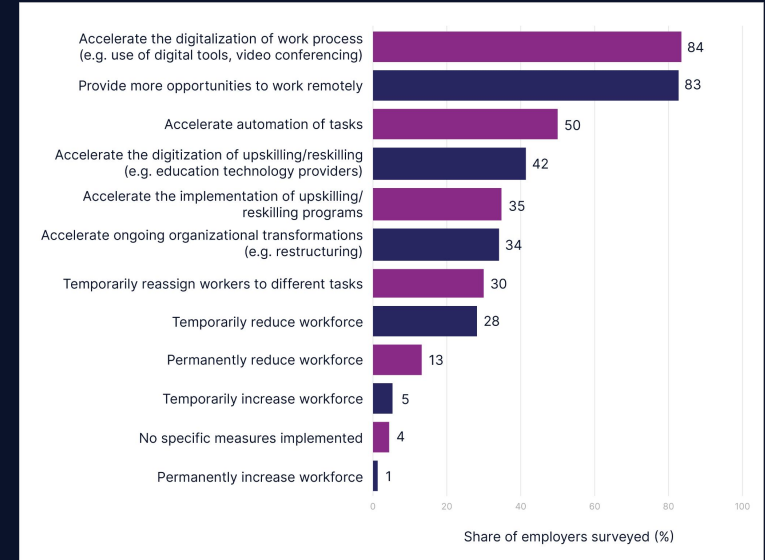
World Economic Forum - The Future of Jobs Report

IT Ops Doing Much More With Less Transformation isn't easy, but it isn't optional either

In a rapidly evolving tech landscape, IT operations (ITOps) play a pivotal role in maintaining stable IT ecosystems, enabling business success. As technology advances, ITOps merges with DevOps and embraces AIOps, leveraging the Intelligent Automation Platform with AI and automation capabilities to enhance efficiency. Automation of IT Operations - using an Intelligent Automation Platform helps CIOs and CTOs increase efficiency within their own IT departments by handling manual tasks, including the following:

- Password resets
- User onboarding and offboarding, notifications and changes
- Software installation
- Software entitlement validation
- Self-provisioning, decommissioning and changes
- UX monitoring
- Back-up and patch management & deployment

In the face of these trends, improving IT operations helps organizations achieve:

- Improved visibility
- Reduced complexity
- Lower operating costs
- Better agility
- Enhanced risk management
- Maximum efficiency, productivity, and profitability across your organization

COOs turn to tech

Investing in digital capabilities
41%

Digital tools for supply chain visibility
30%

Technology transformation for efficiency
54%

Technology for staff interaction and culture
43%

Connected products and services
29%
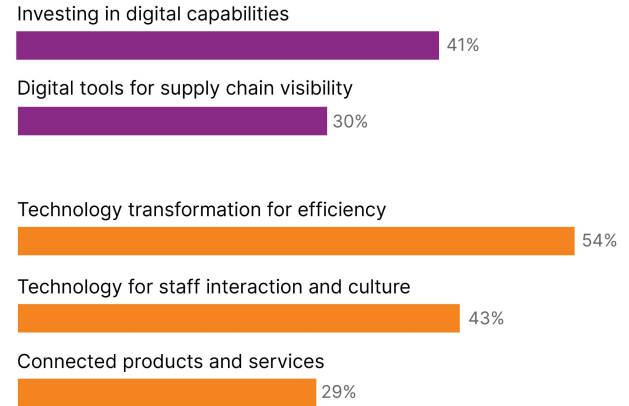
Q: In which of the following areas do you plan to make changes in 2022?
Source: PwC Pulse Survey, January 27, 2022: base of 678, COO base of 99

85%
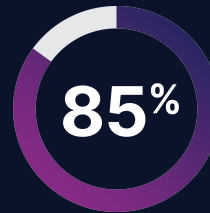
85% of business leaders believe that automation will give them and their employees more time to focus on what really matters to the company

Challenges Solved - #3

Deliver Both Employee and Customer Experiences to Drive Maximum Value

Intelligent Automation Platform helps organizations deliver value-driven service and support to improve operational excellence, uncover growth options and leverage customer data and analytics for contextualized, predictive, value-focused and ubiquitous experiences.

With insights customer care teams can automate basic issue resolution tasks — service and support requests. In addition they will transform their investments and strategies from mitigating costs to delivering value — internally and externally.

Equipped with AI-driven tools like predictive analytics delivered through an Intelligent Automation Platform operators will deliver personalized and proactive experience that resolves issues before customers are even aware that they exist—enhancing CX at every point along the customer journey.

With an Intelligent Automation Platform surfacing insights as to which processes can automated it will help shift the workload away from transactional, repetitive calls and free up capacity to improve CX while offering more rewarding work to employees.

Are you currently using artificial intelligence in your process automation efforts?

Not yet, but we're planning to

Yes

No

Are you currently using artificial intelligence in your process automation efforts
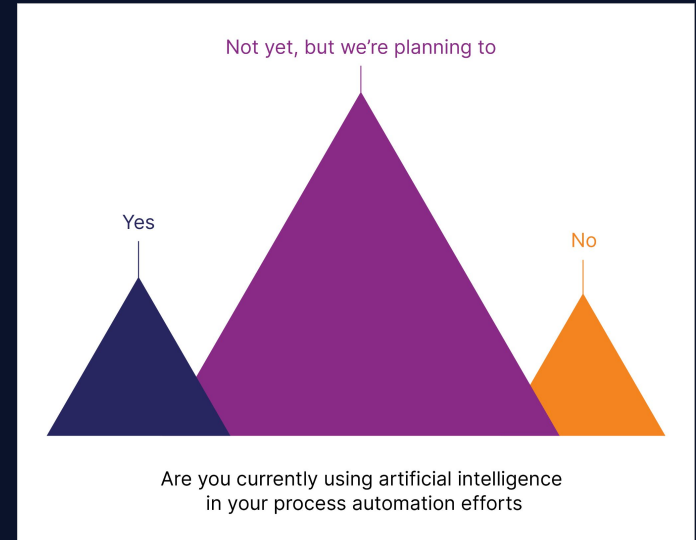
Salesforce: IT Leaders Fueling Productivity With Process Automation

Two Blueprints

For Cost Reduction and Improved Productivity

Put It Forward

How it fits together

When things run smoothly people gain value when they can make effective decisions and operate effectively.

It starts with making the right data accessible and information available to the resources that need it most when the it's needed.

This platform view of how Put It Forward Intelligent Automation Platform fits into your data stack and how it works with solutions you have and processes that you need to improve.

In the following pages you'll see two common use cases solved by Put It Forward Intelligent Automation Platform that customer success teams are solved for.

Source	Ingestion Integration & Prep	Analytics	AI/ML	Best Outcomes Injection	Event Orchestration	Output
	Connecting	**Performance Reporting**	**Data Science**	**Insights**	**Process**	
Files	Event / Batch	Reporting	Predictive	Event Triggers	Event Triggers	Enterprise Apps & API's
Logs	Real Time	Dashboards	Text Analysis	Next Best Customer	Process Orchestration	BI
Applications	Business Rules	BI	Process Mining	Risk Management	Real Time Analytics	Engagement
API's	Transformations	Trend Analysis	Modeling	See Through Revenue	Alerts and Signals	Bots
Bots	Enrichment	Temporal Analytics	Customer Insights			Content
Data Platforms	Profiling		Risk Insights			
ETL	Quality and Lineage					

Operational/Data Automation	Insight Automation	LoB Cross Team Decisions and Transformation

Orchestration

Observability

Process Automation and Data Insights for Customer Experience

Each year over a billion people choose their seat at a restaurant or bar by creating a booking through OpenTable. Owners and managers of experience destinations need to know exactly how things are performing.

Whether it's booking a table at your favorite restaurant, when you're travelling or you're an owner or manager of a restaurant it's success comes down to customer experience.

OpenTable who is a leader in the customer experience booking category needs to ensure that their customers, the owners and operators of customer experiences are themselves having the best possible experience.

Using Put It Forward Intelligent Automation Platform
they can now deliver highly personalized and targeted experiences to organizations looking to leverage the OpenTable Platform.
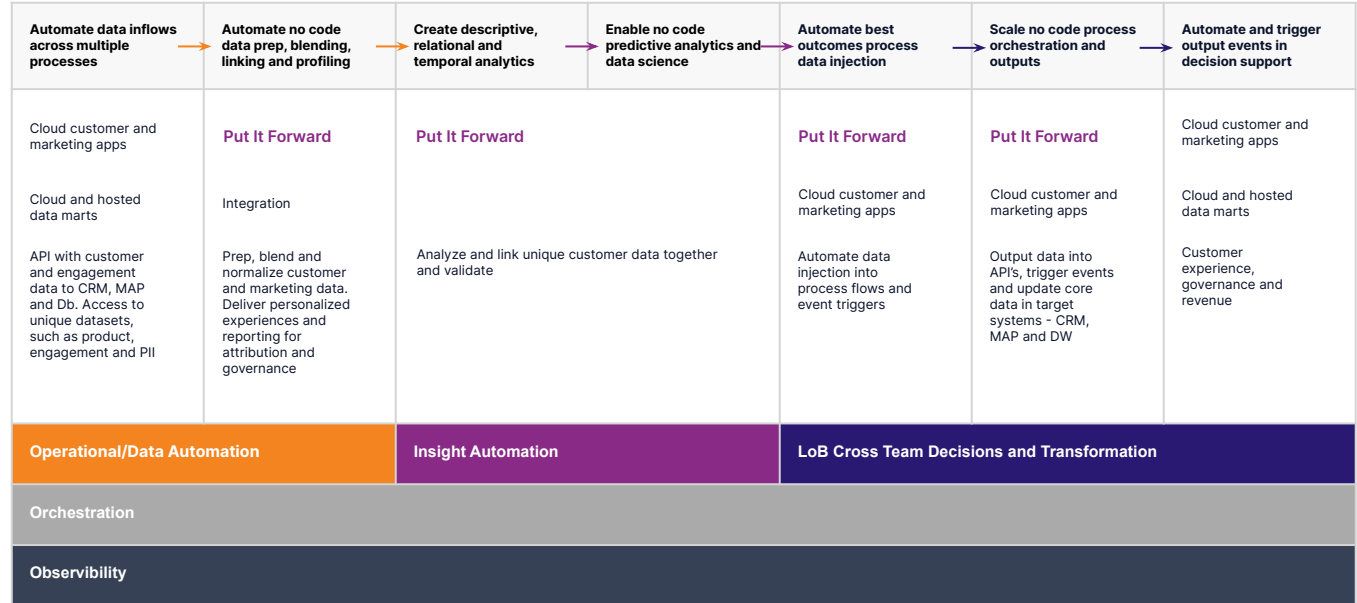
Automate data inflows across multiple processes	Automate no code data prep, blending, linking and profiling	Create descriptive, relational and temporal analytics	Enable no code predictive analytics and data science	Automate best outcomes process data injection	Scale no code process orchestration and outputs	Automate and trigger output events in decision support
Cloud customer and marketing apps	**Put It Forward**	**Put It Forward**		**Put It Forward**	**Put It Forward**	Cloud customer and marketing apps
Cloud and hosted data marts	Integration			Cloud customer and marketing apps	Cloud customer and marketing apps	Cloud and hosted data marts
API with customer and engagement data to CRM, MAP and Db. Access to unique datasets, such as product, engagement and PII	Prep, blend and normalize customer and marketing data. Deliver personalized experiences and reporting for attribution and governance	Analyze and link unique customer data together and validate		Automate data injection into process flows and event triggers	Output data into API's, trigger events and update core data in target systems - CRM, MAP and DW	Customer experience, governance and revenue

Operational/Data Automation	Insight Automation	LoB Cross Team Decisions and Transformation

Orchestration

Observability

This blueprint represents a generic use case scenario for customer experience process automation and insights

OpenTable®

- Deeply Personalized Experiences
- **80% Annual Cost Savings**
- Largest Global Booking Platform

Put It Forward

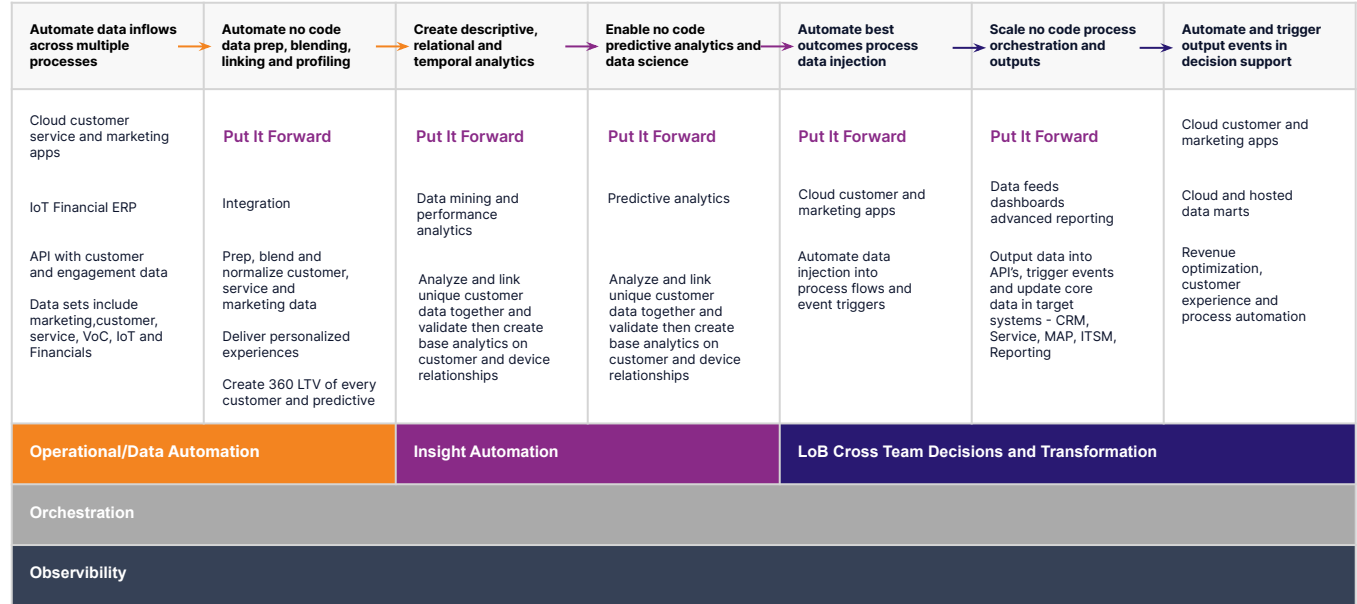# Revenue Creation Automation - Better Decisions at Scale and IoT

Some say that the sounds we hear and feel are the ultimate experience which connect us all together.

SoundUnited which creates some of the most iconic brands in the world of audio centered experiences has customers which engage across multiple brands and channels.

Using the Put It Forward IDA Sound United is able to unite the end to end customer experience across channels, devices and media.

They can now quickly market cross brand and channel with messages that resonate and understand at a detail level what each customer is doing along side of their lifetime value.

This let's Sound United be highly targeted with it's messaging, spend and marketing reducing cost, improving experience and leveraging the network of connected devices to a new level.

Automate data inflows across multiple processes	Automate no code data prep, blending, linking and profiling	Create descriptive, relational and temporal analytics	Enable no code predictive analytics and data science	Automate best outcomes process data injection	Scale no code process orchestration and outputs	Automate and trigger output events in decision support
Cloud customer service and marketing apps	**Put It Forward**	**Put It Forward**	**Put It Forward**	**Put It Forward**	**Put It Forward**	Cloud customer and marketing apps
IoT Financial ERP	Integration	Data mining and performance analytics	Predictive analytics	Cloud customer and marketing apps	Data feeds dashboards advanced reporting	Cloud and hosted data marts
API with customer and engagement data	Prep, blend and normalize customer, service and marketing data	Analyze and link unique customer data together and validate then create base analytics on customer and device relationships	Analyze and link unique customer data together and validate then create base analytics on customer and device relationships	Automate data injection into process flows and event triggers	Output data into API's, trigger events and update core data in target systems - CRM, Service, MAP, ITSM, Reporting	Revenue optimization, customer experience and process automation
Data sets include marketing,customer, service, VoC, IoT and Financials	Deliver personalized experiences					
	Create 360 LTV of every customer and predictive					

Operational/Data Automation	Insight Automation	LoB Cross Team Decisions and Transformation

Orchestration

Observability

This blueprint represents a generic use case scenario for revenue automation

SOUND UNITED

- Complete Customer Experience Automation
- Predictive Revenue
- **#1 Category Leader for Revenue Per Customer**

Put It Forward

How People Use Put It Forward to

Operational Challenges

Put It Forward

Because your customer needs are always dynamic

Operations, and IT leaders need an automation strategy to maximize their data's value. They also need to shorten the time to better quality decisions and operational excellence to handle upcoming changes in the marketplace.

The Put It Forward Intelligent Automation Platform is the superior market offering to unlock your organization's true potential. Beyond creating insights at scale, creating the best possible processes and helping Operators work within a visual interface.

Put It Forward IA platform offers integrations between hundreds of your solutions, including Microsoft, Oracle, Adobe, SAP, SalesForce, etc.

Hundreds of included integrations

But don't take our word for it alone.

Some of the best brands and organizations in the world rely on Put It Forward everyday for their mission critical decisions.

"

Put It Forward takes us where no others could - we struggled for years with an enterprise data story - this solved it across the board."

Udo Waibel
Sitecore

"For me when our internal teams tried to replicate the Put It Forward technology that was when the pin dropped ... these are really smart people."

Sarika Saoji
Symantec

"Having our global teams all working from the same page is critical to our success. Put It Forward exceeded way beyond where others died."

David Hrynk
Brookfield

"You guys showed us what was possible by bringing all the pieces together and making it all work seamlessly. Really truly impressed, thank you."

Lindsay Drake
OpenTable

Put It Forward

Want to deepen your understanding of how you can use Put It Forward Intelligent Automation for Operations to scale better decision making?

Here's a look at some of the top use cases across the enterprise.

Revenue and Marketing

- ✓ Customer 360
- ✓ Predictive Insights
- ✓ Order to Close
- ✓ Fraud Detection
- ✓ Customer Experience

Finance

- ✓ Process Automation
- ✓ FP&A
- ✓ Order-to-Cash
- ✓ Procure-to-Pay
- ✓ Risk Analysis

IT

- ✓ Cross Dept Automation
- ✓ RPA
- ✓ Platform Orchestration
- ✓ Integration
- ✓ Data and Process Mining

Analytics

- ✓ End User Predictive
- ✓ Data Platform
- ✓ Performance Analytics
- ✓ Customer Insight
- ✓ LTV

As we move forward

It's less rip and replace....
but integrate, extend and
embrace.

Getting Started With Put It Forward

Automating processes and decisions while layering in predictive analytics can be complex on their it doesn't have to be. When you use the Put It Forward Intelligent Automation Platform you're uniting the power of your data and systems with automation directly into the hands of your analysts and directors so they can make better decisions at scale.

Ready to start?

Download the guide from IDC on Put It Forward predictive analytics solution for competitive advantage.

Download IDC Guidebook

Discover the value of intelligent automation in your organization with our interactive calculators.

IA ROI Calculator

Learn more about best practices for intelligent automation, methodologies and success patterns.

Book a Discovery Discussion