

PLAYBOOK

The Intelligent Efficiency Automation

How to realize the returns on efficiency with intelligence and automation to support your digital transformation.

“

Most managers have a mindset that if you apply a tool once, you're done ... a single application of a process improvement might yield a 40% gain in productivity. “But to get the 400% gain, you have to use it at least 10 different times.”

Harvard Business Review - Cost Cutting
That Makes You Stronger - July 2023

Short on time - Read This:

- Digital transformation is under pressure to demonstrate continuous value creation and not one off projects.
- The main blocker of success with intelligent automation tools is that they lack the story told by metrics the business and organization can work with.
- Intelligent efficiency automation brings to three core technologies into a single offering enabling enterprise wide automation solutions and not just point offerings.
- **These playbooks and blueprints** show you how to build the case, demonstrate continuous return on value and where it is being created in the organization.

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The State of Digital Transformation

It's required and must be tied tightly to returns on investment.



CLEAR AND TARGETED

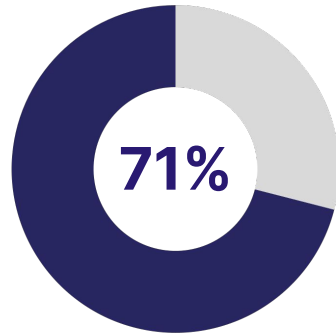
ROI Required

The number one barrier to extending the use of or deployment of automation solutions was the lack of a clear relationship to an identified and quantified business value.

Automation technologies are considered very or critically important investment area in 2023/24.

Decision makers and leaders say the inability to track business value delivered is resulting in a reallocation of budget away from efforts and slowing investment if the benefit isn't clear.

There is a disconnect between how centers of excellence are measure automation success and how business sponsors measure success.



OF AUTOMATION EXECUTIVES SAY THAT TYING AUTOMATION SUCCESS TO BUSINESS VALUE IS A TOP PRIORITY

while the majority of organizations have no methodology for creating or understanding the impact of automation.

Source: Futurum Research and Microsoft

Leadership Priority Shift Operational Excellence

Operational efficiency and orchestration unlock value captured within processes. Without efficient run operations it is extremely difficult to scale effectively.

In general terms, operations invests in best-of-breed solutions and technologies that have a localized impact. They simply don't achieve results at the enterprise level.

Many organizations have localized automation technologies to manage single or simple processes, but none can go end-to-end across the enterprise.



Source: Worldwide Automation & Process Improvement Survey, March 2023; Automation Executives N=300

Current Challenges



Transformation Problem ≠ Disconnected Value

To realize benefit from automation you can't just optimize a process and expect a return - you need to have an understanding of where that new capacity is going to go.

The challenge IT has in this context is that focus has been put on automation at the process level - doing the same thing faster with less people - and not on how the capacity is being consumed within other processes.

Process Automation is a Digital Transformation Imperative

Virtually all (97%) enterprises IT decision makers agree that process automation is vital to digital transformation. Process automation is cited as a key driver of innovation and an important factor in achieving business outcomes.



97%

Process automation is vital to digital transformation

Challenge #1

Showing Continuous Improvement

Maintaining continuous operational support at scale is the table stakes of any technology platform. Now add in the function of being able to demonstrate continuous improvement of a process as it's further automated and the argument for automation can quickly fall apart because it's not attached to how automation steps are being consumed by other processes.

Just stating that unlocking the human capital in the organization to focus on “higher value add” processes and increase “operational capacity” is not enough.

84%

Plan to increase investment in process automation

Market forces driving growth of process automation projects

The digital transformation imperative is further accelerated by macro-economic forces if competition and changing working conditions

 80%

More information is happening because there are fewer people in the office

 91%

The pandemic has resulted in more collaboration between IT teams and business stakeholders to solve challenges

Challenge #2

Identifiable Outcomes Over Time

As the amount of data in your organization grows exponentially your teams time to analyze it does not. Increasing staff counts works up to a point.

Slow decision making technology like spreadsheets and historical trend analysis can't keep up. Line of site decision support and insights that are actionable in the moment is what drives real value creation.

6 Billion Hours
per year are spent working in
spreadsheets

26 Hours
are wasted in spreadsheets per
week by high value team members

8 Hours
per week are spent repeating the
same data tasks

Challenge #3

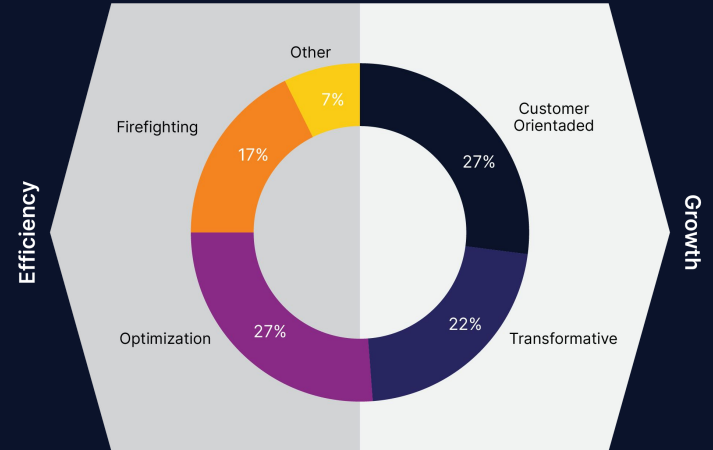
End to End Automation

What automation means for many is transformation of a local manual process into something that is connected to a digital flow.

What it also means is that it is limited to local impact - meaning that as a process is automated it must be re-automated as the process itself changes and doesn't reach across department barriers.

End to end automation with embedded insights at the right step connected with systems is what drives long term sustainable transformation value.

Business Drivers for Process Automation



Question: Thinking about all of your organization's process automation initiatives up until now (that you are aware of), approximately what percentage of them would you categorize in each of the following? [400] Showing average percentages.

Creating Decision Confidence

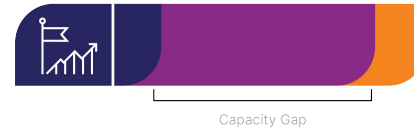


THE DATA DRIVEN STORY - GLOBAL METRICS

Sustainable transformation starts with articulating what the current story is at a global level - how it will change over time and what the outcome looks like.

Global metrics that everyone can understand help show where capacity is, what is underutilized and what the target state is.

Eg. Identified and Closed Revenue



Intelligent Efficiency Automation (IEA) helps identify where and what the capacity gaps are by first solving the data telling story. Then works with you to implement the changes. It's a modern insights technology that combines predictive analytics, process and human in the loop decision support.

The best part is this technology it is low-code and designed for ease of use by all across the enterprise turning your employees from insights specialists and analysts to business movers.

Challenges

Solved

#1 - Showing Continuous Improvement

Intelligent Efficiency Automation helps you link the immediate one time benefit with the sustained investment needed for continuous improvement by showing where the benefit of automation is being consumed in other roles or processes.

#2 - Identifiable Outcomes Over Time

Repeated analysis of more and more facts don't have to consume all of your data teams time or take up more of your time to validate. With IPA predictable outcomes are integrated into your teams decision making process and the best part is you don't have to buy a long list of expensive point solutions. With one platform, you have everything integrated and available at your fingertips.

#3 - End-to-End Automation

Intelligent Efficiency Automation solves for the local vs global automation dilemma by providing for the complete solution which is driven by continuous monitoring and management metrics so long term durable value can be driven.

Three Value Based Tool Sets

For Global Metric Creation, Value Calculators
and Platform ROI

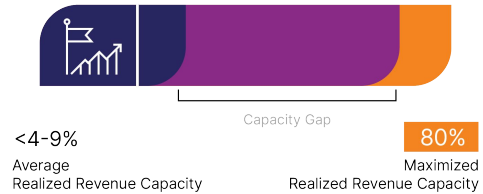


How Global Metrics are Created

Sometimes called Mother or Global metrics.

They are created by mining your current data - this identifies capacity of a process and what your current performance is.

Capacity gap identification can be in multiple domains such as revenue, operations, IT and finance.



Business Value Calculators

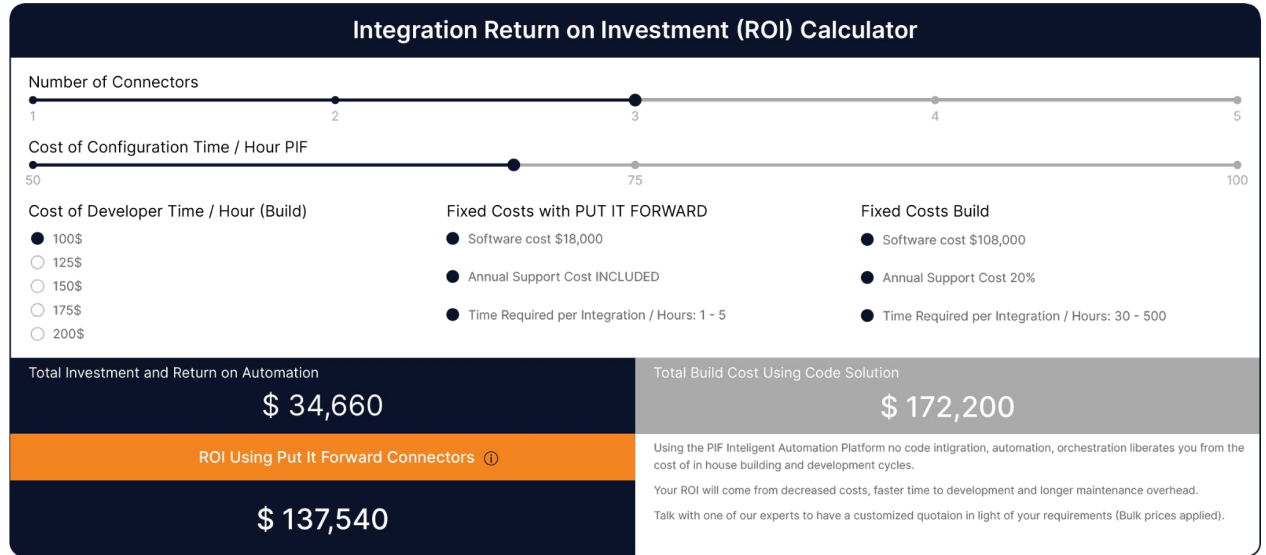
Value calculators feed directly into the business case justification.

They articulate value at the next level of detail what the potential returns on intelligent automation are:

Intelligent Integration - [here](#)

Process Automation - [here](#)

Predictive Revenue Churn - [here](#)



Showing Utility Value - The Platform ROI

The best returns are the ones that keep giving.

Comparative analysis such as this example allow you to see side by side total lifetime cost and savings.

The Put It Forward Intelligent Automation Platform is one that continuously improves on the results by feeding that output back in to identify next level of value harvesting.

	PIF - Flat Fee	Cloud Build/Dev Connector - PayGo	Cloud ETL - PayGo
Data access/egress.	Unlimited - included	Pay per transaction and data packet - \$2-4 per credit rounded to 60 seconds	Pay per transaction and data packet - \$2-4 per credit rounded to 60 seconds
Data stage/prep and transformations	Included	Pay per transaction and data packet - \$2-4 per credit rounded to 60 seconds plus storage of \$25-40 per TB	Pay per transaction and data packet - \$2-4 per credit rounded to 60 seconds plus storage of \$25-40 per TB
Business event triggers	Included	Pay per compute resource - \$2-4 per credit rounded to 60 seconds	N/A
Audit and compliance (time series data)	Included	Data storage cost duplicated only for data tables needing to be replicated for 24 hour period. \$25-40 per TB	Data storage cost duplicated only for data tables needing to be replicated for 24 hour period. \$25-40 per TB
Disaster recovery - auto restart of integration at point of stoppage. (failsafe) plus rollback	Included	N/A	N/A
Total	\$36k data platform + \$24k storage + \$20k compute = \$80k annual	\$6k per month storage + \$60k per month compute = \$792,000 annual	\$6k per month storage + \$60k per month compute = \$792,000 annual

How People Use Put It Forward to
**Solve End-to-End for
Intelligent Efficiency in
Operations and IT
Challenges**

Because your ability to scale efficiently is critical to your future success

Leaders in every part of your organization know that the key to prosperity is the ability to scale great ideas across the enterprise for maximum effect. They also 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 the true potential of your organization. Beyond being able to create insights at scale, create the best possible processes and help IT and work all within a visual interface. Put It Forward's IEA offers integrations between hundreds of your solutions including Microsoft, Oracle, Adobe, SAP, Salesforce etc.

Hundreds of included integrations



ORACLE®



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

Want to deepen your understanding of how you can use Put It Forward IEA for Revenue, Operations and IT 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

IT

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

Operations and Finance

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

Analytics

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

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 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](#)

