

 **Insight** | Digital  
Innovation

 **nintex**



# Towards Hyperautomation

Gartner's #1 strategic technology trend for 2020

# Agenda

- 01** Introductions
- 02** Hyperautomation and relevant trends
- 03** Creating a Centre of Excellence
- 04** Nintex technologies
- 05** Lessons from the field
- 06** Questions and discussion

# Introductions



**Chris Ellis**

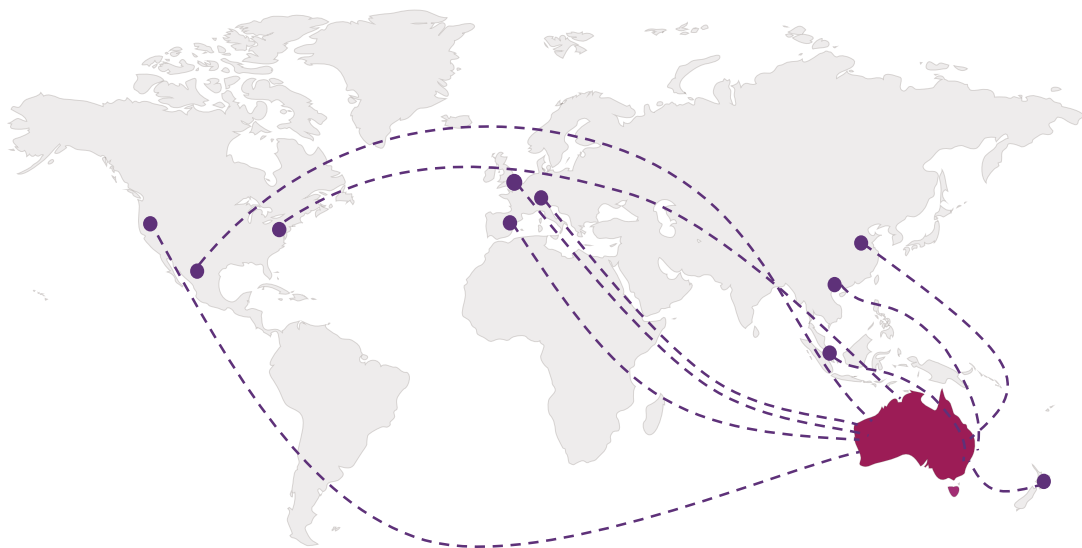
Director, Pre-Sales - Nintex



**Martin Harris**

Capability Lead: Intelligent Process Automation - Insight  
Nintex vTE (Virtual Technology Evangelist)

# Combining global expertise with local knowledge and insight



AUSTRALIAN TEAM

**180+**

Technical Architects  
and Developers

DEEP EXPERTISE AND  
GLOBAL FOOTPRINT

**1,300+**

Technical Resources in  
our Worldwide team

APAC REACH

**10**

Offices across  
Australia, Singapore,  
China, and New  
Zealand

GLOBAL PRESENCE  
Operations in

**21 countries**

servicing clients around  
the globe

#1 MICROSOFT G  
PARTNER

GLOBAL AWARDS  
WON

**10+**

ENGAGED  
WORKFORCE

**11,500+**

Insight teammates  
worldwide

# 2020 NINTEX PARTNER AWARDS

Customer Success

**WINNER**



# Part one

# Hyperautomation overview

# Hyperautomation?



Automation

Using technology to reduce or remove human involvement in tasks or processes.



Hyperautomation

Systematically automating all feasible business processes, utilising multiple approaches and modern technologies.

# Automation approaches & technologies

Traditional  
coded solution



Integration platforms



Event processing



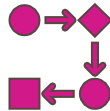
Conversational  
agents  
(chat bots)



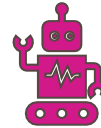
Artificial Intelligence



Business Operations  
(ERP, HRMS, etc.)



No/low code  
Workflow



Robotic Process  
Automation

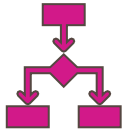


Advanced Analytics



# Why hyperautomation?

Hyperautomation allows automations to chain together, **compounding** their benefits and **multiplying** their value.



Process

- Efficiency
- Speed
- Accuracy
- Consistency
- Reliability



Staff

- Less mundane tasks
- Focus on higher value activities
- More human interaction
- Higher engagement & empowerment
- Greater productivity & satisfaction



Organisation

- More scalable
- More agile
- More competitive
- More compliant
- Leaner

# Example: manual invoicing process



## Invoice received

An invoice is received in the Accounts Receivable inbox.



## Manual data duplication

Invoices are individually opened, read, copied to a network file share, and the relevant data is pasted into an Excel spreadsheet for tracking purposes.



## Manual review & approval

Depending on the information in the invoice, various business processes are manually performed, and these are all tracked in an Excel spreadsheet.



## Manual data entry

The invoice details are manually copy & pasted from the tracking spreadsheet into the financial system for final approval, calculation, and processing.

# Example: automated invoicing process



## Invoice received

An invoice is received in the Accounts Receivable inbox.



## AI extracts invoice data

A pre-built AI model to extracts the relevant data from the invoice using computer vision.

Another AI model checks data against common patterns for fraud, errors, or unusual activity.



## Automated approval

For invoices requiring human judgement, a chatbot (conversational agent) prompts the relevant user to review and approve the invoice, in Microsoft Teams, using natural language conversation.



## Automated data entry

Once approved within Microsoft Teams, an RPA workflow automatically enters the extracted invoice details into the financial system by simulating user mouse clicks and keystrokes.

Part two

# Creating a Centre of Excellence (CoE)

# Centre of Excellence – why?



Keep automation efforts **aligned** across business strategy, IT capabilities, resource constraints



Offer **guidance** and **assistance** to allow a broad audience to utilise no-code tools, within governance guidelines



Ensure quality across **high risk** automations: initial / example / reusable / complex / business critical



Provide **oversight** and **ownership** of the automation program and assets

# CoE Roles



# Building Momentum

## Establishment

- Automation strategy
- Governance model
- Roles and responsibilities
- Service offering definition
- Resourcing and training plan
- Business engagement approach
- Change management and comms.
- Support - technical and business
- System integration and interfaces
- Reusable components
- User experience and dashboards
- Standards, templates, documentation

## Pilot

- Initiate Governance
- Commence operations
- Automate select processes
- Test business engagement
- Validate and refine model
- Iterate as needed

## Automate

- Rapid automation
- Prioritised based on RoI

## Operations

- Support
- Governance
- Training
- Adoption and change management

## Continuous Improvement

# Elements of success

## Strategic direction

Review your goals and focus your energy.

1 <b>Wh</b> Why	2 <b>Fs</b> Future State	3 <b>Ap</b> Action Plan	4 <b>Ex</b> Expansion
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## Active leadership

A structured approach to driving Promapp.

5 <b>Lp</b> Lead Process Champion	6 <b>Es</b> Executive Sponsor	7 <b>Eb</b> Executive Buy-In	8 <b>Pc</b> Active Process Champions	9 <b>Fo</b> Process Forums
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## Process framework

Get the basics right (and review as you go).

10 <b>Me</b> Process Mgmt Approach	11 <b>Gs</b> Group Structure	12 <b>Ps</b> Process Standards	13 <b>Sp</b> Scope Processes	14 <b>Ac</b> Accessibility	15 <b>Cf</b> Configuration	16 <b>Rs</b> Resourcing
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## Capability

Give your people the skills they need.

17 <b>Rb</b> Role-based Training	18 <b>In</b> Induction	19 <b>It</b> Internal Trainers	20 <b>Su</b> Succession Planning	21 <b>Sa</b> System Admin
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## Engagement

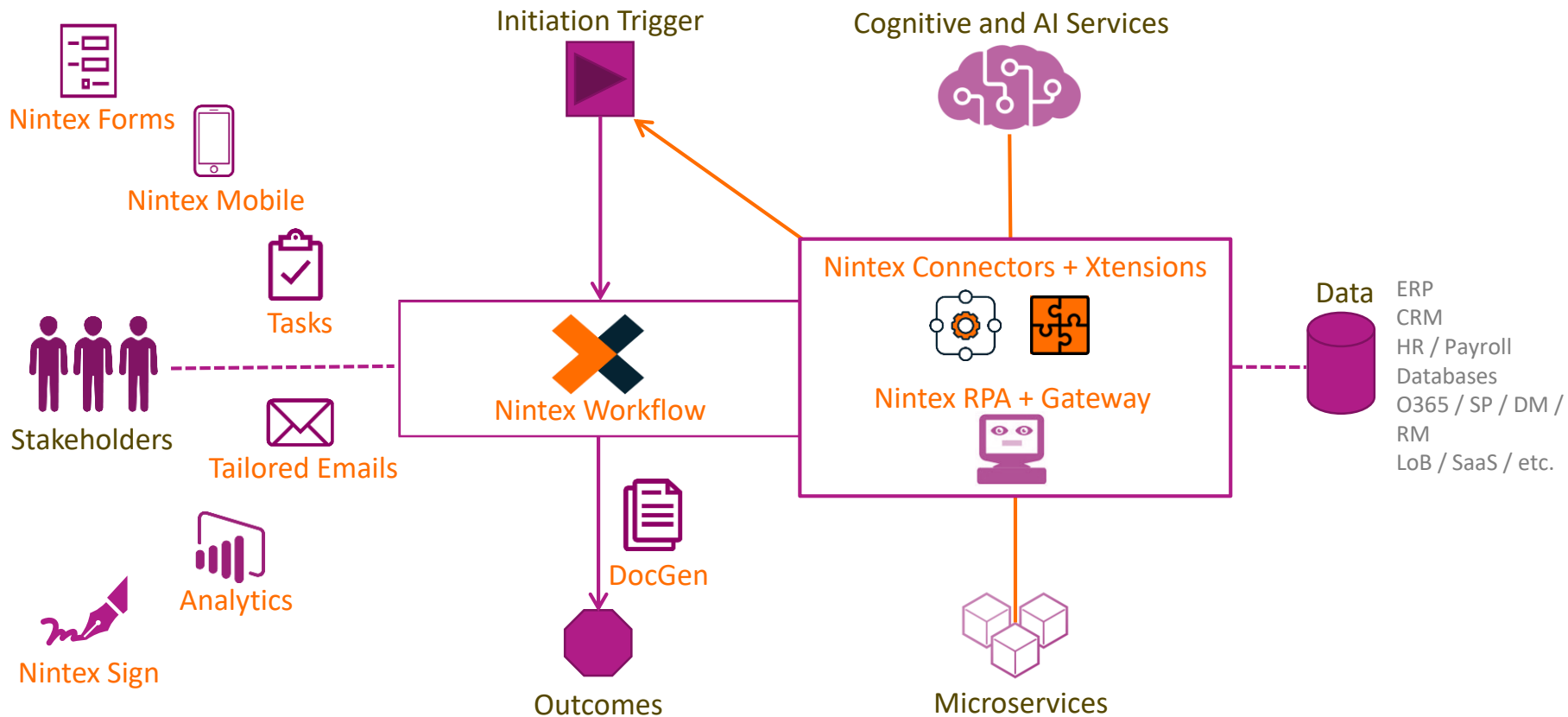
Embed BPM as part of your culture.

22 <b>Cm</b> Change Management	23 <b>Co</b> Comms	24 <b>Tb</b> Track Benefits	25 <b>Re</b> Reporting
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# Part three

# Nintex technologies



# Transform Lead to Cash on Dynamics 365 with Nintex



Manage

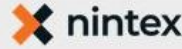


Automate



Optimize

Process Planning and Mapping



Promapp (Live on Azure Marketplace)

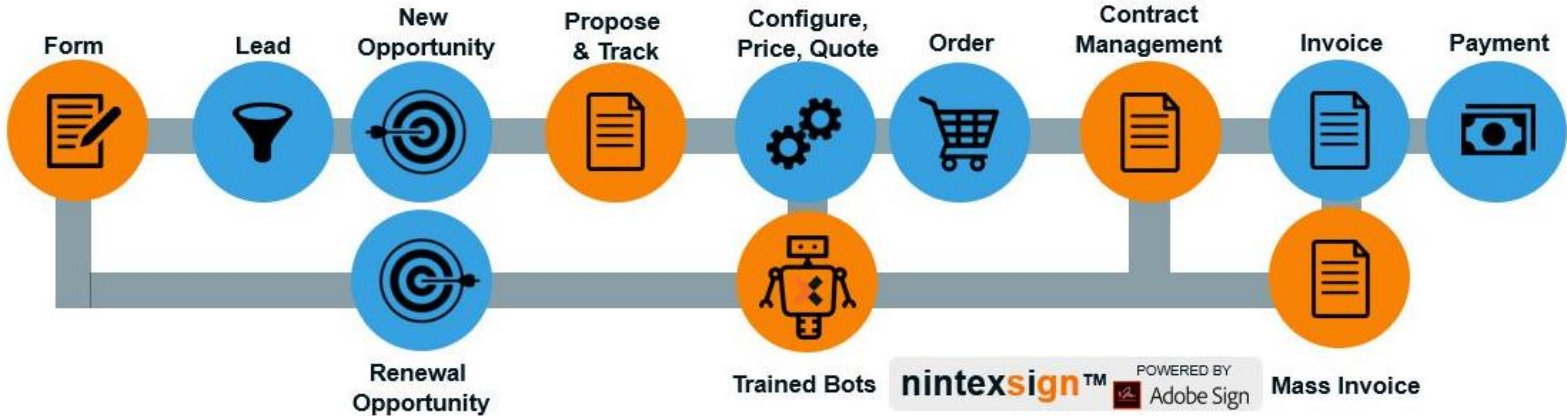
Lead Routing and Qualification  
Process Map

Proposal Creation  
Process Map

Order Form Creation  
Process Map

Contract Negotiation/  
Redlining Process Map

Post Sale Billing,  
Provisioning, and  
Onboarding Process Map



Advanced Visual Workflow & Automated Transactions



Automation – Forms, Workflow, & RPA

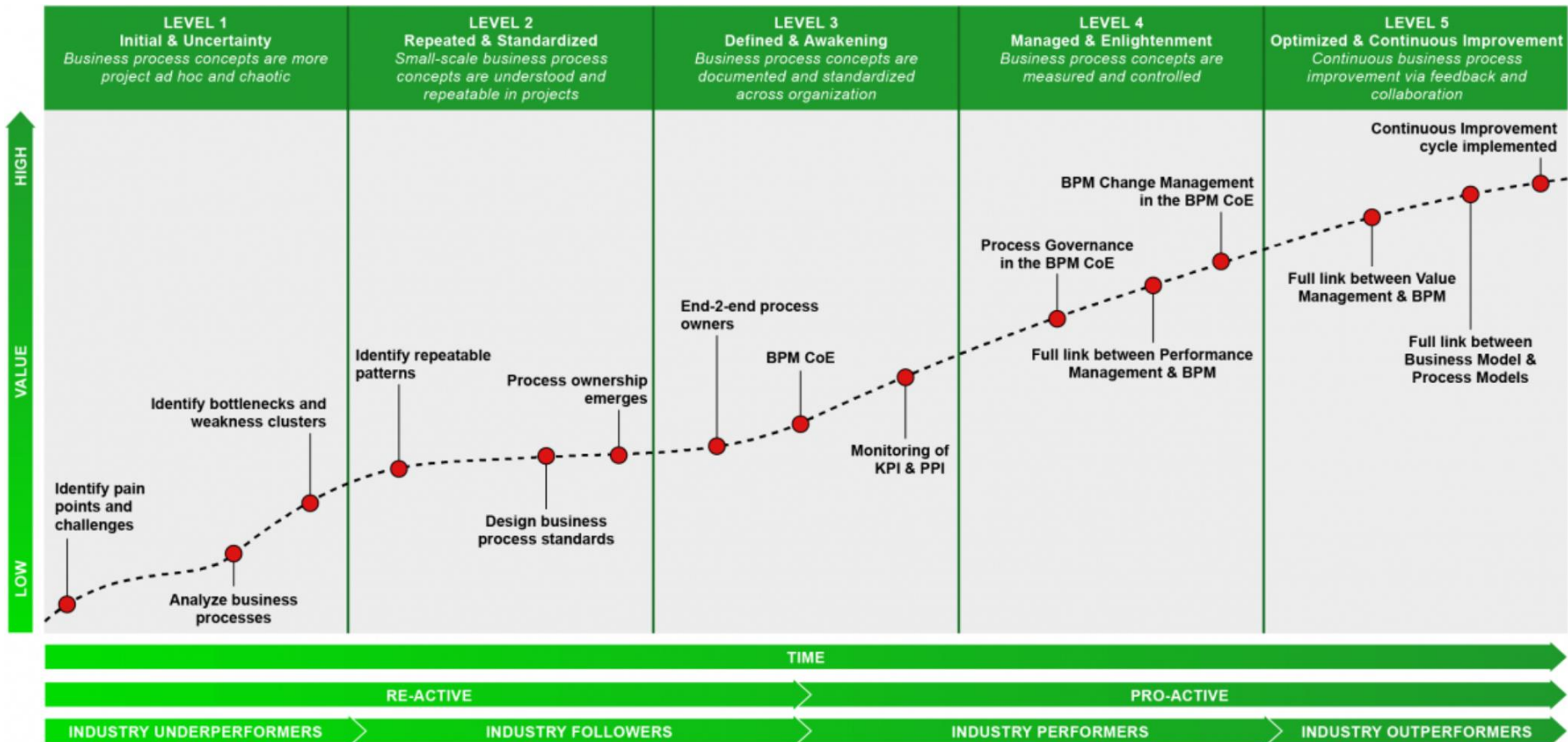
Process Analytics and AI



Analytics (Power BI)

# Part four

# Lessons from the field



--- Example Maturity Journey ● Example Milestone

<https://www.bpmhandbook.com/volume-1/table-of-content/bpm-and-maturity-models/>

# Consider the bigger picture



Mindset

**Hyperautomation is not a project, it's an operational mindset**

Needs to be driven from business operations, not driven by IT

Can be treated as one facet of broader business improvement initiatives

Expect to never stop automating and improving processes



Change

**It's a significant change to people, teams, and the business**

People will fear impacts and may actively oppose automation

Sell the individual benefits and be transparent on the strategy

Don't just make the tools available and hope for the best

Governance and support structures are essential for success

# Common automation pitfalls

- ❗ Deploying without a strategy and operational plan
- ❗ Automating in an isolated “patchwork” manner
- ❗ Automating a bad process (without improving it first)
- ❗ Starting with the most complex process first
- ❗ Taking a “one size fits all” approach
- ❗ Aiming for perfection

# Target 120



Government of **Western Australia**  
Department of **Communities**

## Goals

- Co-ordinating early intervention measures
- Connecting young people at risk of becoming repeat offenders with vital services and support

## Solution

- Nintex Workflow and Forms in Microsoft 365
- Seamless authentication across Police, Child Protection, Justice, Education, Health
- Automated provisioning, task generation, reminders
- Integration into analytics and mapping platforms

## Outcomes

- Reduced youth crime in Coolgardie by 30%
- Finalist in 2020 Nintex Solution Innovations Awards





# Financial System Replatform



## Goals

- Implement Microsoft Dynamics for Finance and Operations
- Ensure business operations align with system changes
- Minimise business impacts during cutover

## Solution

- Promapp provided the backbone of the BPM governance framework
- Business process community established to define and enforce standards
- Complete mapping of current-state and future-state ERP business processes

## Outcomes

- Role-based clarity for stakeholders across 100 processes, 450 UAT scenarios, 21 training guides
- Many process redundancies and improvements identified and incorporated into the ERP build
- Enabled detailed Business Continuity Plan and Change Management materials

# Next steps

## 01 Confirm your automation strategy

Choose a small number of automation platforms

## 02 Catalogue and prioritise automation opportunities

Promapp is ideal for this

## 03 Establish your Centre of Excellence

Ensure appropriate ownership and resource balance

## 04 Settle in for the long haul

Constantly automating will become the new normal

# Part five

# Questions and discussion

# Thank you

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