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A Manager's Checklist For A Successful Application Workflow Automation Strategy

To satiate customers' growing appetite for high-quality modern digital services, large enterprises are scrambling to usher complex application workflows through a maze of heterogeneous systems and teams. Despite the resources organizations are expending, for many, application workflows still miss the mark: Over two-thirds of decision makers in our research say they frequently contend with an inability to deliver services in time for the business, excessive manual work to create or manage workflows between different applications or environments, and an inability to prevent services failures before they occur. To keep pace with the speed of digital business, organizations must connect and automate these workflows in a coordinated fashion. Forrester designed this checklist to help leaders lay the foundation for a successful workflow automation strategy through seven key steps.

1. DEFINE THE DESIRED OUTCOMES THE ORGANIZATION INTENDS TO ACCOMPLISH.

A sound application workflow automation strategy begins with the end goal in mind. If you are counting the number of automation systems or tabulating your automation investments as a proxy for quality, stop. Simply having automation in place does not mean you are meeting business goals or effectively serving your customers (whether they are internal or external). Instead, start using outcomes as your guide. Develop a deep understanding of your customers as well as the services and experiences you must deliver to win, serve, and retain them. From there, define the specific outcomes you intend to achieve through your customer interactions. Identify what your department needs to keep, start, and stop doing to best support these goals.

2. DRAW A MAP OF SERVICES THAT ILLUSTRATES WHERE TEAMS AND SYSTEMS ARE CONNECTED.

Create a map that helps your team visualize critical workflows and the teams and systems they touch. Pinpoint the spots along workflow paths where value is created and lost. Analyze weak workflow links to understand whether vulnerabilities are people-, process-, and/or technology-related. For example, are the owners/operators of these services aligned around the same goals? Can the supporting workflows be redesigned to be more effective? Can technology step in to remove the workflow execution burden from staff so they can focus on more strategic tasks?



Summary of results from the BMC Software-commissioned Thought Leadership Study, "Face The Workflow Automation Gap Head On"

METHODOLOGY

BMC Software commissioned this study to evaluate the current state of application workflow automation at large companies and the value decision makers see in having a comprehensive workflow automation solution that can help scale workflow automation across the enterprise.

To achieve these objectives, Forrester conducted a global online survey with 355 IT leaders involved in application workflow automation at large organizations (1,000 or more employees) across a range of industries.

3. LOCATE THE MANUAL WORKFLOW HANDOFFS THAT ARE RIPE FOR AUTOMATION.

Our research revealed that organizations have only harnessed a fraction of the workflow automation that is possible to attain. This means a reliance on manual handoffs to bridge automation gaps is common. In fact, 32% of organizations' critical digital services depend on multiple manual handoffs between systems or teams to be completed. In addition, organizations require an average of eight people to orchestrate workflows. To streamline workflows and reduce the drag on vital resources, use your workflow map to locate manual steps that are ripe for automation. If security review, process checklists, managerial approval, deployment of applications, and/or technical review are manual steps in your digital services delivery process, you are not alone. Many decision makers in our research also manage these steps manually. However, these are all areas that automation can significantly help.

4. TAKE STOCK OF THE AUTOMATION TECHNOLOGY IN PLACE TODAY AND HOW WELL IT IS WORKING.

IT leaders in our research are prioritizing serving customers, reacting to changing markets, and improving IT efficiency — making it critical to evaluate not only what automation tools you have, but also how well they are working. Take stock of the automation tools in place today and ask yourself: How are they being used? What problems are they solving? What problems have not been solved through these tools? Of the unsolved problems, which could be addressed through the expanded use of automation? As part of your assessment, consider how modern these tools are. A digital business needs technology that adapts and scales quickly, reliably, and economically to support today's and tomorrow's customer goals.

5. EVALUATE THE TECHNOLOGY NEEDED TO AUGMENT EXISTING WORKFLOWS IN SUPPORT OF CUSTOMER GOALS.

Only when you have completed the steps above should leaders turn their attention to evaluating new technology. Determine if there is an opportunity to consolidate or standardize the use of automation tools to simplify and scale workflow automation across the company. Just 23% of IT leaders in our research have access to a single workflow automation system that can manage all types of workflows. Yet many say having a single workflow automation solution like this would lead to customer and business benefits, including greater operational visibility and control and higher-quality customer experiences. In addition to a single point of control, the ability to automatically capture and manage workload logs, build automation in without complex scripting, and provide role-based access and views are the features IT leaders in our study would be most likely to look for in the workflow automation solutions they're evaluating.

Application workflow automation refers to the design, execution, and automation of processes based on workflow rules where human tasks, data, or files are routed between people or systems based on predefined business parameters.

6. PROACTIVELY MANAGE THE HURDLES THAT MIGHT IMPEDE YOUR UPDATED WORKFLOW AUTOMATION APPROACH.

As with any new strategy that brings change to established ways of working, your team should expect to face some barriers. For instance, your new workflow processes might bring new compliance considerations. Try to anticipate the roadblocks that might slow progress and establish a plan to proactively mitigate their effects. For example, team members will need to know how their roles might change. Empower them with new skills and opportunities that will allow them to flex in a less specialized, more cross-functional environment that is not bogged down by role handoffs and rigid hierarchies.

7. SELECT THE METHOD YOU WILL USE TO MEASURE AND MONITOR YOUR DESIRED OUTCOMES.

To measure progress toward your future state, set goals that are both actionable and measurable. Instead of nebulous goals such as “improve throughput,” be more specific, like “reduce transaction times by 50%,” where you have specified **what** you want to improve and **how much** you want it improved. These types of goals are often referred to as objectives and key results (OKRs) and can be a useful tool to track progress. When used effectively, OKRs align service delivery teams with their stakeholders so that stakeholders believe their needs will be served and the service delivery team can prioritize work that will deliver the needed improvements.

To read the full results of this study, please refer to the Thought Leadership Paper commissioned by BMC Software titled, “Face The Workflow Automation Gap Head On.”

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