

How to Take the Work Out of Workflows



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4me offers organizations the required capabilities to enable all internal departments, such as IT, HR, and Facilities, as well as external service providers and customers, to collaborate securely and seamlessly on one complete platform, reducing complexity and improving productivity.

Workflows are a vital part of collaboration. Actions must be performed in a certain sequence to achieve an expected result. Progress, performance, and results of workflows should be easily manageable and traceable.

In this paper, we will discuss why the service management solution of an organization is the ideal foundation for enterprise workflow automation. We will also explain the relevant functionalities of 4me for easy integration with automation solutions.

Benefits of Workflow Automation

Due to their repetitive nature, workflows are ideal candidates for automation. Let's look at some of the benefits of workflow automation:

Reduce cost

Human effort is expensive; the cost of this effort is without a doubt one of the most significant costs in any service organization. This means that automating workflows as much as possible is an ideal opportunity to reduce costs.

Increase delivery speed

In today's world, time is money. Increasing the delivery speed of workflows will minimize delays and allow an organization to respond quickly to changes. In some cases, increased delivery speed can also help lower costs, for example when revoking software licenses or shutting down cloud server instances after large-scale testing.

Eliminate risk

Workflows ensure that all necessary steps to comply with laws, policies and regulations are executed. Automation ensures that these steps are executed within the prescribed time frame. An example is revoking access to systems and data when an employee leaves the organization. Timely execution of these tasks ensures compliance and also lowers risks of data breaches and unauthorized access to information.

Being able to execute workflow tasks often requires access to systems or data. Multiple people often have similar access. This, in turn, increases risks of password breaches, leaving sensitive information unattended, and possible abuse of confidential data. Automation limits the required access to a minimum and will therefore help eliminate risk as well.

Improve quality and consistency

Repetitive workflows should have consistent and predictable outcomes. Most deviations are caused by human error. Automation will improve the consistency and predictability of the output of the workflow.

Address Lack of Resources

Another reason for organizations to start automating workflows is a lack of available resources. There are simply not enough (skilled) people to do the work. Workforce participation is the percentage of people aged 16 years or older who are employed or seeking employment.

The graph below shows the trend of workforce participation in the U.S. Other regions of the world show very similar trends: the participation rate has steadily declined for over two decades.



This means that workflow automation is becoming vital to continue operations with a shrinking workforce.

Why Automation is Challenging

The benefits of workflow automation seem obvious. So why are organizations still struggling with workflow automation?

Technology

One reason is technology. Automation requires expensive, highly specialized tooling and well-trained experts to build and maintain the automation flows. These experts are often hard to find or are already occupied with other assignments. So there is a clear need for platforms that remove much of the complexity from building automation flows. This allows an organization to involve less technical (and less expensive) specialists. Luckily, the automation marketplace increasingly offers low-code, cloud-based integration platforms.

Siloed solutions

Organizations often already have some automation in place. These are frequently siloed solutions: point-to-point integrations between systems that support a specific use case. Each support domain uses its own automation solution.

Automating cross-domain workflows would lead to disparate data. Workflow definition and information about results, performance, and costs are scattered across multiple systems. Reporting is difficult and will require the consolidation of information from multiple sources.

Another issue with siloed solutions is data security and compliance. Sensitive data crosses multiple systems from multiple vendors. The security, compliance and processing agreements of all involved systems and organizations must be carefully considered.

Data security and compliance

Using additional tooling also introduces new compliance challenges. Sensitive data is passing through the new platform, so data security, compliance, and data processing agreements need to be carefully considered.

The Linking Pin: The Service Management Solution

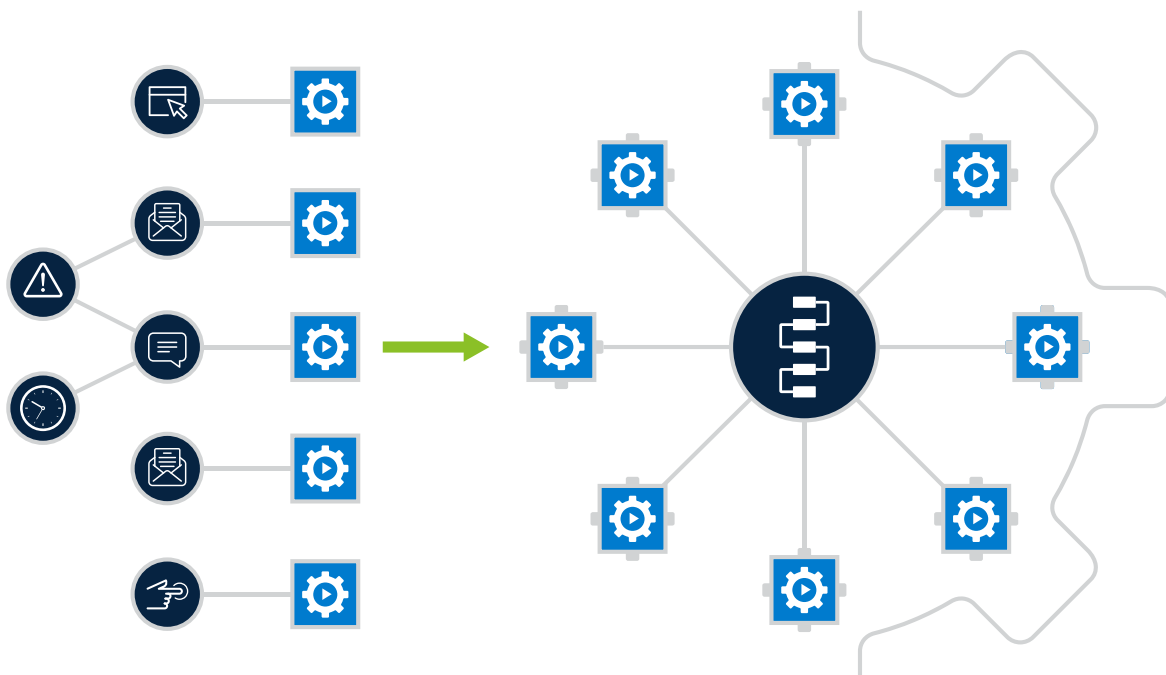
Enterprise service management (ESM) is the extension of IT service management practices to additional support domains like HR, Finance, Facilities and Legal. Service management solutions like 4me, designed to support ESM out of the box, allow organizations to define and run cross-domain workflows without the need to build integrations or replicate data.

This makes the service management solution an ideal foundation for enterprise workflow automation. Workflows are registered, coordinated, and monitored in the service management solution. Automating the execution of individual workflow steps requires separate tools but is orchestrated from the service management solution.

As described before, organizations often have a multitude of point-to-point automations in place. Replacing the existing solutions with a single 'can do it all' automation platform will not solve the issues described earlier. Existing automations are often performing well in their limited scope and there will be little enthusiasm for a replacement that will deliver the same result.

The service management system should therefore easily integrate with existing automation solutions. This protects the existing automation investments and allows gradual growth into full enterprise workflow automation.

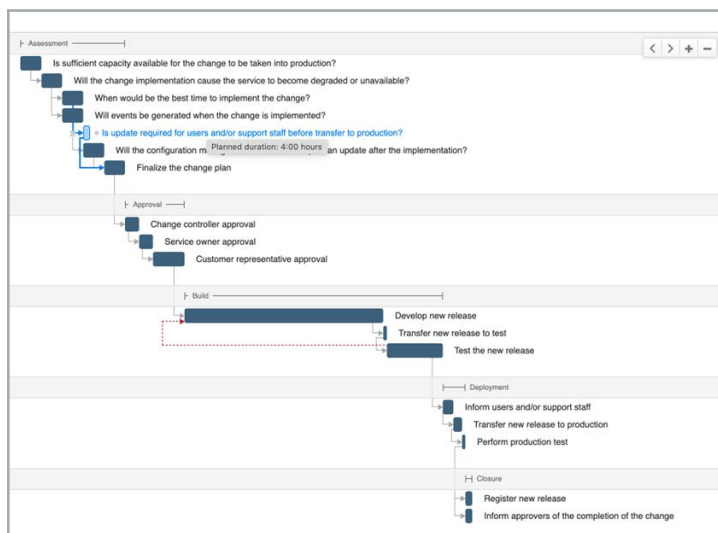
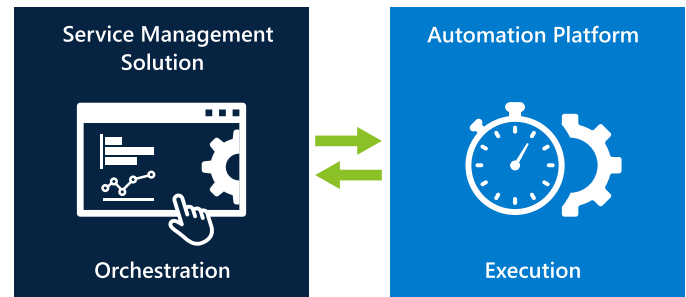
Each step of a workflow is registered as a task in the service management system, even when this task will be completed by automation. The result of the execution of the task is added to the task record. For each automation task, a trigger is sent to the relevant automation solution. As soon as the confirmation of successful execution is received, the task is completed and the workflow progresses.



Where to Start?

An obvious first step into enterprise workflow automation is to look at existing automations and ensure these are orchestrated by workflows in the service management solution.

The next step is identifying tasks that are executed frequently and require a lot of effort. Multiply the average effort by the annual frequency to calculate the total cost of effort for these tasks. Next, look for tasks that could be automated with the least effort and therefore the highest ROI. These quick wins will generate support for additional automation efforts.



Screenshot of a Workflow Template. The red dotted line is an exception flow.

Workflow Automation With 4me

4me provides all required capabilities for defining, administering, and automating complex workflows across multiple business functions, departments, teams, and suppliers.

Workflow management

Blueprints of workflows are created in 4me as workflow templates. An easy-to-use drag-and-drop interface allows a workflow manager to quickly add relevant tasks to a workflow template. By linking tasks to predecessors and/or successors, a workflow manager can ensure tasks are assigned and completed in a certain sequence.

Sometimes workflows do not run as expected. Exception flows define what should happen when certain tasks could not be completed successfully. It might be that a certain part of the workflow needs to be restarted. In other cases, additional tasks are necessary to successfully resume the original workflow.

Each time a new workflow is started, this workflow, with all its tasks and dependencies, is created according to the selected template.

Workflow Automation

4me provides several functionalities to easily integrate with any automation solution:

Accounts allow an organization to create segregated environments for business functions, organizations, providers, or customers. Via the **trust** feature, 4me accounts can exchange data without the need to replicate data or build integrations. This allows the organization to define workflows for teams in multiple accounts. The entire workflow can be orchestrated from within a single account when all required trusts are in place. This simplifies the automation of this workflow, eliminating the need to perform actions in multiple accounts. Because of the implicit data segregation between accounts, automations do not have access to more data than required.

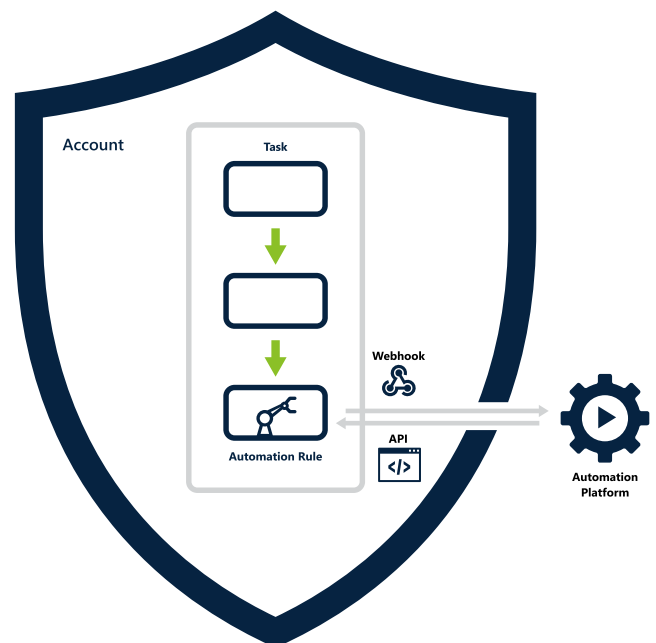
Workflow Templates allow an organization to preconfigure workflows. Individual activities in the workflow are represented by Tasks. Tasks can have interdependencies which allow a workflow manager to define the order in which Tasks need to be completed. A new workflow is always created with a Workflow Template as a blueprint.

Each step of the workflow should be included in the template as a Task, irrespective of whether the execution will be automated or will require manual effort. When all predecessors of a certain task are completed, 4me will automatically activate this task by setting its status to assigned. For tasks to be executed by automation, the activation of the task is the right time to start the automation.

Automation Rules allow an organization to automate the administration of workflows. Examples of these automations are updating fields, adding Notes, sending emails or triggering Webhooks to external systems.

Webhooks are event-driven messages to external systems like an integration platform. A Webhook always contains a payload with important information for the system that is receiving the Webhook. Webhooks can be triggered using Automation Rules.

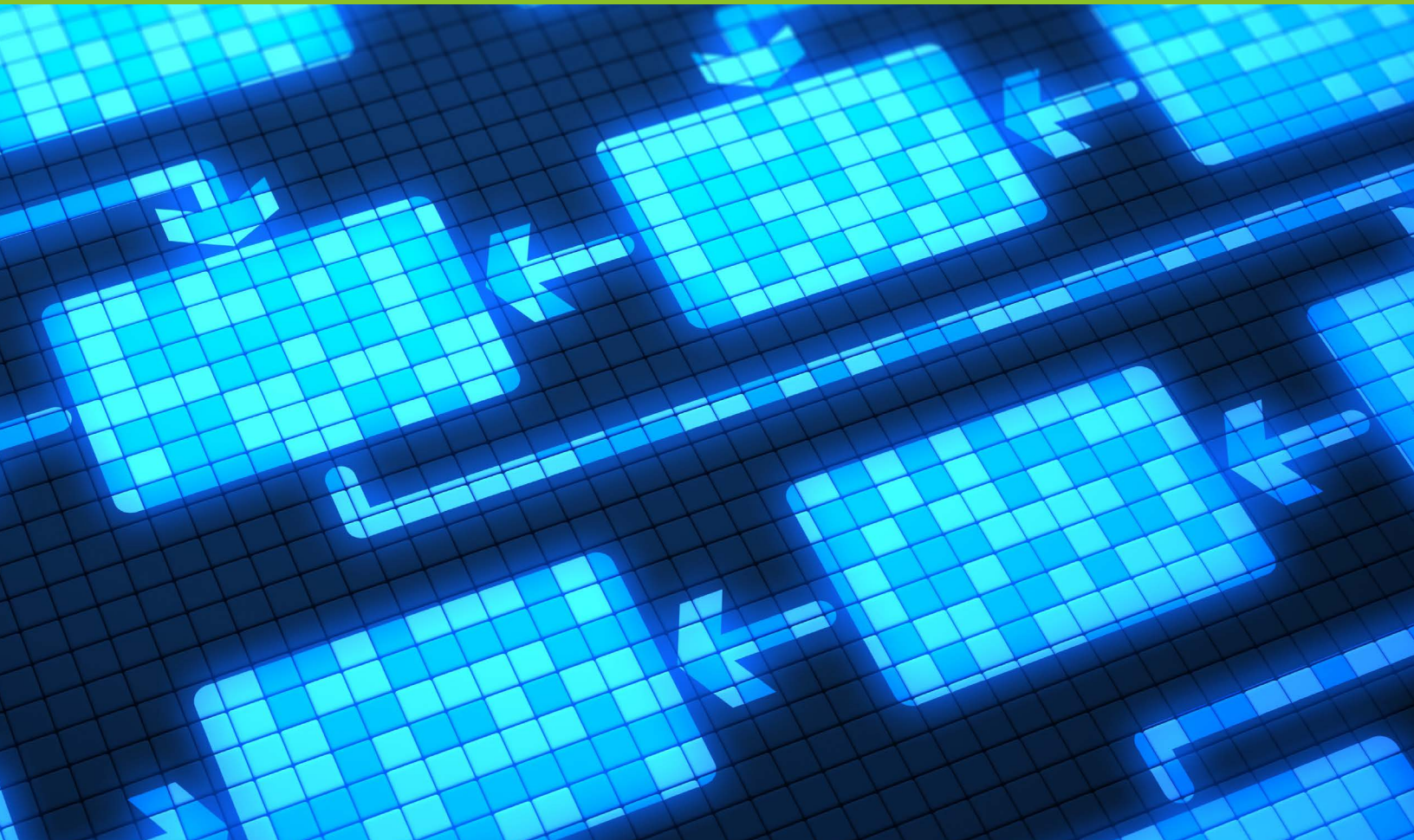
REST and GraphQL APIs allow external systems to retrieve, modify and create data in 4me. Automations use this for retrieving additional information and adding the result of the automation to the automation task record in 4me.



Conclusion

In this white paper we discussed the advantages and challenges of enterprise workflow automation. A strong case was made for the service management solution to serve as the foundation for automating workflows.

The service management solution should easily integrate with automation solutions to protect current automation investments and gradually grow into full workflow automation. We described how 4me provides all the required capabilities for successful enterprise automation orchestration.



The **Complete** Service Management Platform

4me® combines ITSM with ESM and SIAM capabilities, enabling all internal departments, such as IT, HR, and Facilities, as well as external managed service providers, to work seamlessly with each other. At the same time, 4me provides complete visibility and control of service cost and quality.