Drag-and-drop. Point-and-click. Easy, visual forms & workflow on mobile.

About frevvo

frevvo is point-and-click software to quickly design online forms and approval workflows that connect your people, data and systems at affordable cost. We are committed to helping you achieve success via our Customer Success Team that includes world-class support, services and training. We can't wait for you to join over 750 customers currently using frevvo Live Forms to increase productivity and drive down costs.

To learn more, please visit us at https://www.frevvo.com, contact us at info@frevvo.com or call 203.208.3117.

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Chapter 1: Why Do We Need Workflow Automation?

What is Workflow Automation

Every business has its own set of processes for approvals from on-boarding new employees to approving purchase requisitions to processing student applications. The process might be 3 steps or 10 but the general concept is straightforward: deliver information from Point A to Point B with all the required authorizations, checks and reviews. Today, business takes place online, globally, on mobile and 24x7. Paper and email-based processes are slow, inefficient and ill-adapted to the online world.

Workflow automation helps organizations transition these key processes online. Think of it as a GPS system that electronically routes documents and tasks to the right people at the right time. The system allows each authorized user to comment, modify or approve documents before moving them forward in the workflow and ensuring that documents reach their final destination in a timely manner. The workflow automation system makes sure that key business standards cannot be bypassed.

Do We Need Workflow Automation?

Is this a common scenario in your workplace? An employee wants to perform some core function and starts out by searching for a form located on a network drive on in a SharePoint repository. After finding the form, it's printed out and manually completed or perhaps it's an Excel spreadsheet and it's filled in electronically and then printed out for signature. After signing and scanning the form, it's then routed by email from person to person for required approvals. Many times, approvals are delayed because someone is traveling or otherwise unavailable. Each time the form must be printed, signed

and scanned. Sometimes the instructions are confusing or employees are too busy and they skip steps. After approvals are complete, someone logs in and enters the information into one or more systems. Throughout this inefficient process, errors inevitably creep in from data-entry errors to incorrectly routed forms to missing or invalid data.

Paper- or email-based processes are simply out of place in the modern workplace. Your employees are also consumers. They're used to slick always-on apps on their mobile devices and they're already going around I.T. to get around rigid, outdated requirements so they can get their jobs done faster.

If you start seeing or hearing any of these four signs in your organization, it's time to consider a workflow automation solution.

Where's my authorization?

"I need my authorization; where is it currently stuck? Did my manager approve it? Is it now waiting for the VP or the CFO?" Time spent chasing down signatures is 100% wasted. It's incredibly inefficient and frustrating. What's worse, your business is slowed down because an employee cannot purchase the much-needed item since it's pending approval.

I had too much on my plate

Business processes within organizations are complicated. It's very common to have Excel spreadsheets with lengthy instructions on how to route for approval. If the Department is Sales and the Amount is over $5,000, you must get approval from your Manager and VP unless it's coming from Canada in which case you need to also get Regulatory approval etc. Employees are confused and very busy so they simply skip steps. The process takes twice as long since you have to scramble at the last minute to get the necessary authorizations.

My manager was traveling

An employee needs a key purchase authorized in order to meet a deadline but her manager is traveling on business. She has to wait 2 weeks for the manager to return and misses her deadline. In today's world of electronic notifications and mobile access, it's inexcusable.

Didn't I already do that?

How often have we filled out school or medical forms that ask the same information over and over again? The new employee on-boarding has multiple forms with common data across those forms. Parts

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or Order or Customer data sits in SQL databases or CRM systems and has to be re-entered into a form to complete a Purchase Order. It's tedious and wasteful.

How will we benefit from Workflow Automation?

1. Increased efficiency

What might the transformed, modern business application look like? It will undoubtedly:

- ✓ Automate forms and workflows so there's no need to print, sign and scan.
- ✓ Integrate with data and systems to reduce tedious manual data entry.
- ✓ Intelligently route documents to the right person at the right time to ensure that business constraints are satisfied.
- ✓ Automatically support all mobile devices and speed up the approval process by providing 24x7 access from anywhere.

2. Astounding ROI

It's often hard to see how much those paper- and email-based workflows are really costing you. Let's do a quick analysis. Consider a 3-step workflow:

1. Performed by an Employee – a Travel Authorization or Purchase Requisition. Let's say this employee costs $80,000/year including benefits, vacation, taxes and other costs (equivalent to a salary of about $60,000).

2. Performed by a Manager who essentially checks the request, approves it if it is valid or sends it back for corrections. Let's say the manager costs $100,000/year inclusive of all costs.

3. Performed by an HR or Finance person who essentially updates an internal system and does the equivalent of filing the request. Say, this is a part-time person costing $60,000/year.

Now, assume that the time savings are 10 min, 3 min and 3 min respectively in each step. That's pretty conservative given there's no printing, signing, scanning etc. involved. Finally, assume that there are

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400 approvals per month of all kinds (Vacation requests, Sales Orders, Time Sheets, Travel Authorizations etc.)

How much do you think you will save in costs? You might be shocked:

You'll **save ~$50,000 every single year or 57% of your costs and see net positive ROI in just a bit over 2 months**.

That paper/email process actually costs you close to $85K per year. And that doesn't even take into account the time spent trying to track down emails, chasing down managers for signatures or, perhaps of greater importance, the Opportunity Cost of delayed approvals.

3. World-class Customer Service

Over-delivering on customer service is the single most important thing you can do to increase revenue. Otherwise, today's consumers will quickly move on to the competition.

Today, customers are used to interacting with your organization online at any time. If they need some information from your company and it's only available during business hours, they'll be frustrated and feel inconvenienced. Automation ensures that your customers have a smooth experience by enabling them to access information when they need it.

When employees are wasting time chasing down internal approvals, they have less time to focus on customer service. Automated approvals free up their time so it can be invested into what's important: customers, students and patients.

4. Business Agility

Automation taking advantage of cloud (+ mobile) is a critical driver of business agility – roughly speaking, the ability of your business to react rapidly to changing business conditions. Think of two main aspects:

- ❖ **Responsiveness** – Enable employees to *do the right thing at the right time*. That means reducing business complexity (stop wasting time on paperwork, errors, missing signatures etc.), employee efficiency (let them work anytime, anywhere and using any device) and collaboration (access to people and information from anywhere as needed).

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- ❖ **New Opportunities** – Faster rollout of new business initiatives as business conditions change e.g. introduce a new product offering or modify internal processes to quickly satisfy changed customer demands even something as simple as letting people buy on their mobile phone.

Both are sources of significant competitive advantage. According to Harvard Business Review's recent survey on Business Agility in the Cloud, companies are already seeing business value and benefits from simplification, collaboration, and faster reactions to new opportunities.

This business agility appears to lead to some very tangible and measurable outcomes: 49% are more likely to have entered a new market in the past three years i.e. rolled out business initiatives quickly to take advantage of a new business opportunity. Significant majorities believe cloud (+ mobile) reduces business complexity (71%), increases employee productivity (69%) and responsiveness to customers (53%).

Where are you seeing the greatest business value from your company's use of cloud? [SELECT UP TO THREE]
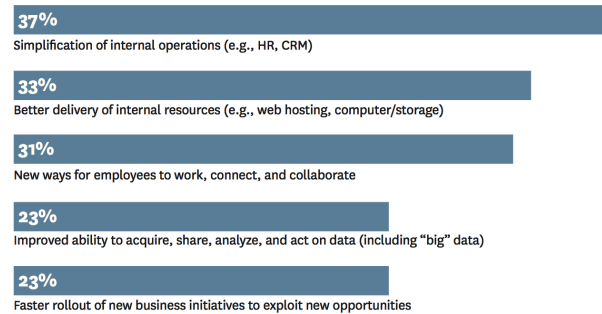
37%
Simplification of internal operations (e.g., HR, CRM)

33%
Better delivery of internal resources (e.g., web hosting, computer/storage)

31%
New ways for employees to work, connect, and collaborate

23%
Improved ability to acquire, share, analyze, and act on data (including "big" data)

23%
Faster rollout of new business initiatives to exploit new opportunities

*Figure 1: Business Agility in the Cloud
(Harvard Business Review)*

5. Enable Mobility

75% of U.S. information workers rely on mobile. In response, businesses are prioritizing mobility with 88% of them saying that mobile functionality is either very important or an outright requirement.

But, one-off mobile apps are hard and barriers abound. Time, budget and skills are all in short supply.

Nowadays, mobility is about reaching users through all channels, especially mobile web browsers, as users often don't bother to install a native app.

Workflow automation systems offer visual and low-code approaches that let you provide business functionality in web-apps and spread that development out among more people – the "citizen" developers in your organization. That in turn eases pressure on I.T. teams, freeing them up to meet business needs.

Fig.16 - What's the top business functionality for apps you will develop in 2017? (rank in order of importance)

Mobility (Web sites/portals that are mobile-friendly)

Mobility (Apps)

Integration of disparate systems/data sources

Modernizing/replacing legacy systems

Workflows/business forms

Process automation through advanced algorithms

CRM/sales systems

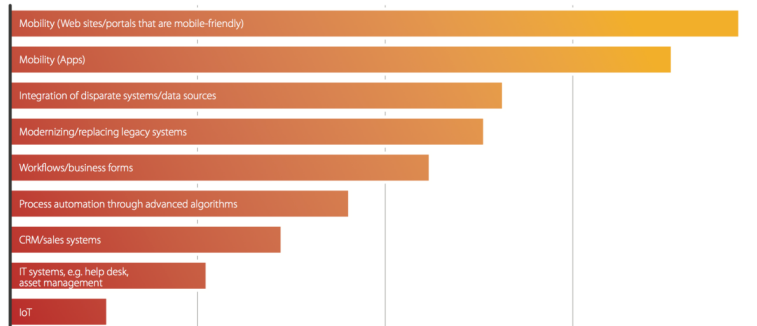IT systems, e.g. help desk, asset management

IoT

*Figure 2. 2017 Business Priorities
OutSystems 2017 State of Application Development Report*

Which workflows should we automate?

Routine, everyday workflows that are ripe for automation include:

- ✓ Employee Onboarding: Simplify the process of bringing on new hires and make them productive on Day One. An automated workflow can move them through HR, equipment provisioning, card access, benefits enrollment and more.
- ✓ Purchase Requisitions: Speed up internal approvals for purchases. If employees don't have to wait for key items, they're likely to meet deadlines and you won't be left scrambling.
- ✓ Vacation Request: One of the most common processes and easy to automate since it's typically straightforward and does not have a complicated approval path.
- ✓ Travel Authorizations: Business travel is already painful nowadays. Make it a bit easier for your employees by ensuring that they don't have to chase approvals and get reimbursed in a timely manner.
- ✓ Student Applications: At most Universities, the majority of students do everything on their mobile devices. Make it easy for them to register for classes, request transcripts, fill out food-service surveys and the dozens of college workflows by automating them on mobile devices.
- ✓ Patient Intake/Referral: Being a patient already means you aren't having the best day. There's no need to make them fill out endless forms, especially with repeated information. Automated, streamlined processes make it easier on patients and can also reduce wasted Doctor time.

Mercy Ships automates over 70 day-to-day forms and workflows with frevvo Live Forms for HR and Volunteer processes

Customer Profile: Mercy Ships, a global charity, has operated a fleet of hospital ships in developing nations since 1978. Mercy Ships follows the 2000-year-old model of Jesus, bringing hope and healing to the world's forgotten poor.

> "We wanted a single, affordable solution that would be able to address our forms, workflow and document signature requirements. frevvo's modern, browser-based solution is easy-to-use, meets all our business needs at a reasonable price.
>
> Live Forms is the best web-based forms & workflow solution on the market today to address our needs."
>
> **Chris Gregg,**
> **Chief Information Officer**

Business Situation: The organization was using Adobe LiveCycle forms. However, as major browsers on desktop and mobile devices dropped support for the Adobe plugin, it was getting increasingly difficult to use. Mercy Ships also had workflow in some of the forms. They had to download the form, open it, make changes or sign the form and then email it around. Emailing documents around for approval is a tedious and error-prone process.

Solution Summary: Mercy Ships selected frevvo Live Forms because it provided an easy-to-use solution that handles forms, workflow as well as signatures at an affordable cost. In addition, frevvo's generous support for non-profit organizations and world-class Customer Success team have ensured a successful deployment.

Mercy Ships has approximately 1,000 volunteers per year who serve onboard the *Africa Mercy* ship including doctors, engineers, and maritime crew. They may stay for as few as 2 weeks to a lifetime. Recruiting volunteers is an involved process with many documents to sign, especially on the medical side. With Live Forms, they have an online process where volunteers fill out and sign several frevvo forms (medical, confidentiality agreements). frevvo then generates a PDF which is sent to HR for further processing.

They also use Atlassian Confluence internally as their collaboration system worldwide. Mercy Ships has deployed many forms and workflows integrated with Confluence. These include HR business processes like internal transfers and changing the length of a volunteer's commitment as well as things that affect operations onboard the vessel such as safety documents, security assignments, and equipment requests.

Many workflows require approvals from people onboard and at the International Support Center in the US. With Live Forms, they can access forms and workflows hosted in the US from computers or mobile devices anywhere including a ship near the African coast.

Benefits:

- ✓ Users save time by eliminating the need to download/email for signatures.
- ✓ Live Forms provides end users with a fantastic user experience. Users find it easy to use and are more likely to adopt these new solutions as a result.
- ✓ Integration with Confluence, HR databases and Active Directory automatically initializes fields, populates pick lists etc. which reduces data entry and mistakes.
- ✓ Escalations and reminders assure that approvals are handled in a timely manner reducing delays and improving the efficiency of the organization.

Mercy Ships currently has over 70 forms & workflows in production use with several more to be rolled out in the near future.

Chapter 2: I.T. is overloaded. How can we get this done?

Let's explore in greater detail how a visual, "do-it-yourself" (DIY) workflow automation platform can invigorate your organization's process improvement initiatives and enable mobility.

I.T. is underwater

In most organizations, the I.T. department is viewed as the provider of application development services. But demand is exploding, particularly for mobile applications. Nearly half (44%) of I.T. professionals said that they planned to build more than 10 mobile apps in 2017.

The unfortunate reality is that I.T. resources are severely constrained and simply cannot keep up with the speed and agility demands of the modern enterprise. Software development cycles are often rigid and can take months to deliver even simple business applications. These formal processes which involve requirements gathering from business to coding, testing, deployment and ongoing maintenance may be labeled "agile" but, from a business point of view, they're anything but.

Fig.5 - How many applications does your organization plan to build in 2017? - Companies with 5,000+ employees

- **33%** - <10
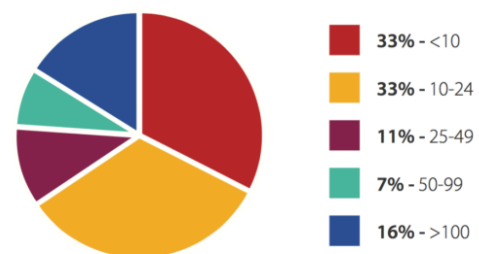- **33%** - 10-24
- **11%** - 25-49
- **7%** - 50-99
- **16%** - >100

Figure 3. Companies plan to build lots of mobile apps. OutSystems 2017 State of Application Development Report

Imagine though that your business users who best understand these day-to-day processes had access to tools that were visual and easy enough to use that they could create applications themselves. A modern workflow automation system can do exactly that and let your "citizen" developers automate

and optimize workflows at far lower cost and far greater speed than traditional I.T. development processes.

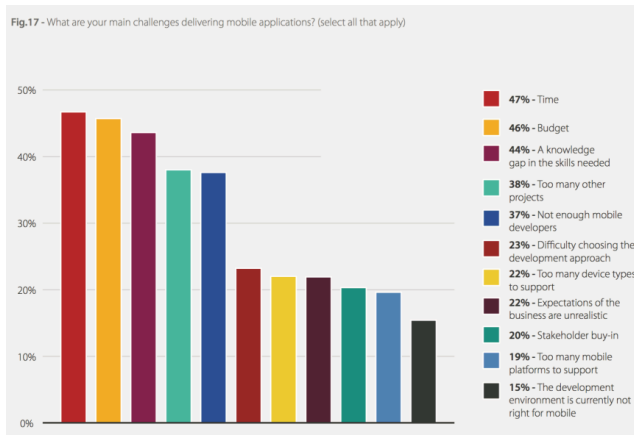## Barriers to Mobility Abound

Figure 4. Time, Budget and Skills are huge barriers.
OutSystems 2017 State of Application Development Report

The mobility story gets worse. I.T. professionals have discovered that creating mobile apps is one thing, creating mobile apps that people will actually use is far more difficult. In fact, nearly 60% of employees abandon corporate mobile apps because of a bad user experience and go rogue by installing their own mobile apps. That puts corporate data at risk.

Time is a major challenge – it's very common for mobile apps to take well over 3 months and, in some cases, over a year.

Budgets are an obvious problem: app development is enormously expensive and it's not at all unusual to spend from $500,000 to over $5 million to create apps.

And, even if you have the time and the money, it's practically impossible to find people with the highly sought after skills that are required.

It's obvious that new approaches are required. Visual drag-and-drop, point-and-click systems can be effectively used by "citizen" developers and don't require the same sort of hard-to-find specialized skill sets that native app development requires. Regardless of company size, industry, geography or any other factor, these alternative approaches to mobility are increasingly taking hold.

Citizen Developers deliver results

As technology has matured, companies have discovered that they no longer need to take a native-only approach to app development. Progressive web and responsive web have rapidly become mainstream as companies realize that these apps meet their business needs but they're also much faster and cheaper to build.

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As a result, two-fifths (43%) of companies are already supporting or planning to support citizen developers and it's a trend that's on the rise. Gartner predicts that 70% of large enterprises will empower citizen developers in the next 3 years.

Citizen developers with skill sets that already exist in many organizations can certainly drag & drop fields onto e-forms, setup basic workflow routing and, in some cases, even do some integration using point-and-click wizards. Of course, I.T. still needs to get involved at some stage e.g. SQL database integration, custom code-based business rules etc.

These new approaches also don't require the same skill set as native app development does thereby addressing one of the most important barriers to mobility.

But, visual workflow automation technologies allow app development to be spread out among more people and they deliver results. That frees up I.T. to meet other business needs. It's a win-win situation for all.

The App Building Dream

Rapid Development, Built-in Mobile, Data Integration, Watertight Security and Scalability.

Time, budget and lack of skills mean most companies simply do not have the resources to build out and maintain multiple customized versions of every app for the great variety of devices found today. Yet, they simply must have the ability to respond to rapid changes in the marketplace.

That's why they're increasingly turning to visual, drag-and-drop software platforms for rapid app development. These platforms dramatically increase productivity since they enable citizen developers not just coders-by-trade to develop applications. Included responsive design tools mean that the resulting web applications automatically adjust to the form factor of the device being used. The resulting apps work on all devices and are easy to update.

Point-and-click wizards enable apps to use data in a variety of systems from Cloud-based systems like Salesforce and box.com to Microsoft SharePoint and internal SQL databases. When automated workflows can connect to systems and use data, they're simply far more useful.

Finally, many software platforms are now available in the Cloud enabling customers to add-on and remove capacity as needed. Cloud providers have years of experience scaling their systems and keeping them secure. In fact, the vast majority of Cloud systems are far more secure than their data-center counterparts.

Modern workflow automation platforms provide transformative benefits:

- ✓ Streamlined, efficient workflows that allow employees to focus on customers.
- ✓ Built-in mobility.
- ✓ Business agility to react quickly to changing market conditions.
- ✓ Dashboards that provide insights into your business and facilitate optimization of processes.
- ✓ Data-driven decision making.

Central Wyoming College automates their Purchase Order Workflow in less than 10 days of work

Customer Profile: Central Wyoming College serves Fremont, Hot Springs and Teton Counties. CWC is committed to supporting students through their educational journey and helping them achieve success.

Business Situation: CWC wants to reduce their reliance on paper and sneaker-net processes. They saw significant value in streamlining their PO process which involves calculations, lookups and dynamic routing fixing a particularly error-prone procedure as a result.

> **"Our PO workflow was automated in record time. The forms look good and are easy-to-use. frevvo's system just works and meets our needs at reasonable cost."**
>
> **John Wood, CIO**

Solution Summary: CWC's selection of frevvo Live Forms to automate their PO process was based on the look & feel of the forms, speed of implementation, ease of use and dynamic workflow routing. The PO form contains logic that validates all fields entered by the user before routing to approvers. The dynamic workflow routing relies on cost center codes to determine the appropriate approvers. POs over a specific amount automatically route to the VP – matching CWC's purchasing policies. frevvo also includes reminders if the PO is not approved within a specified time as well as an escalation path.

Benefits:

- ✓ CWC streamlined their PO process reducing hours of staff time manually chasing approvals.
- ✓ Dynamic workflow routing is integrated with Google Apps making it easy to maintain.
- ✓ The built-in task list allows their Business Office to quickly review POs including a full audit trail.

With frevvo, CWC staff can get back to focusing on students rather than administrative tasks.

Chapter 3: Have others used these visual automation solutions?

Approval workflows are pervasive throughout most organizations. Let's take a look at several departments using an imaginary company: ACME Inc.[†] The company has not digitized any of its processes and operates inefficiently as a result. ACME relies heavily on e-mailing Excel spreadsheets around for approvals. The sheets often have lengthy sets of instructions to follow. Let's see how a modern, visual, point-and-click workflow automation solution was used to digitize key processes across every department and turn ACME Inc. into an agile business that's responsive to customer needs in a changing market.

Smarter Finance on the Train

Every organization must deal with finance. Finance departments are under increasing pressure to provide executives with a real-time view into the financial status of a company. Consider Nancy, the controller at ACME Inc. She routinely struggles with several financial tasks including:

- ✓ Expense Reports: While ACME is not a large company, it still provides services throughout the city. Representatives travel to multiple customer locations on a daily basis. Expense reimbursement is a routine process. Since the process is not currently automated, employees submit Excel spreadsheets and attach scanned paper receipts. Nancy checks any expense above $50 and approve it. The expense data is then manually entered into ACME's accounting system before employees are paid. It's tedious and inefficient – Nancy hates doing it and employees hate waiting for their checks.

[†] Many of the experiences described here come from our own implementation of these workflows at frevvo Inc. We have benefited immensely by using our own product.

- ✓ Invoicing: ACME's sales team gets customers to sign contracts (generated as PDFs from a Microsoft Word document) and emails them to Finance for processing. Unless the upfront deposit is paid, the services cannot be rendered. Nancy's team must invoice customers, reconcile payments when received and email the salesperson to update CRM and proceed with the services. The sales team often uses inconsistent terminology necessitating back-and-forth emails for clarification. Payment is often delayed and services are not rendered fast enough.
- ✓ Travel Authorization and Reimbursements: These are used for pre-approving business travel and reimbursing employees after the travel. They are very similar to expense reports, but come with added complexity since they're maintained by the HR department. As with other processes, there's a lot of wasted time chasing down incomplete or invalid data, emailing back and forth with Sue in HR to get the necessary paperwork etc.
- ✓ Purchase Requisitions: Sometimes ACME's employees need to purchase equipment or a service to effectively perform their jobs. As with everything at ACME, this means fill out an Excel spreadsheet, email it to your manager, get it signed and approved and then send to Purchasing. Once the item is acquired, Finance is notified so that the appropriate invoice can be paid and charged to the proper account.

Nancy takes the Shoreline East commuter train to and from work every day. It's a 1-hour train ride each way and she dreams about being able to leave the office early and handle some of these routine tasks on the train using her phone. She goes to Will, the Head of I.T. and asks for his help automating some of this work.

HR takes off

Sue in HR faces many of the same problems Nancy does. The HR department in particular touches every employee in the organization for every single day of their employment. From their first day as they're being on-boarded to exit interviews on their last day, Sue deals with tedious manual tasks:

- ✓ Employee onboarding: ACME's internal onboarding process requires employees to fill out multiple forms. Many of them have the same information repeated over and over again. Employees must complete Federal and State forms, enroll in benefits, must be assigned a cubicle, computer equipment, a cell phone, access to network drives and internal systems and a parking pass. Inevitably, one or more of these goes wrong and employees are usually not as productive as they can be on Day One unnecessarily costing ACME money.
- ✓ Leave Approvals: Even though ACME uses an HR system, it's not integrated with anything. When an employee wants to take vacation, he/she fills out an Excel spreadsheet and emails it

to the manager. The manager has no idea if the employee has enough remaining vacation before approving and signing it. It's then e-mailed to Sue who manually enters it into the HR system. If there's a problem, Sue has to e-mail the employee and manager back to get it fixed.

✓ Travel Authorization and Reimbursement: ACME requires business travel to be pre-approved. This process has two parts: first, the employee completes a form indicating dates, estimated expenses and business reasons for travel and emails it to his/her manager for approval. It may require two levels of approval depending on several factors. Then, weeks later, after the travel has been completed, the employee has to find the pre-approved Excel spreadsheet in email and enter the actual expenses. This is then re-submitted to the manager but only if the actual expenses exceed the pre-approved expenses. It's then e-mailed to Nancy for reimbursement (along with the usual manual data entry) and finally back to Sue for filing.

Sue's been using slick business apps on her iPhone for years. She loves that she can deposit checks from her phone without going to the bank, check her flight status and get a boarding on the phone and rent a car in just a few clicks. She wants some of the same ease of use in her day-to-day tasks and decides to bring it up with Will, the I.T. Head, at their next management meeting.

Sales

Like Sue, clients are getting tech-savvier every day. When ACME's sales team acquires a new client, they want to make the process as easy and convenient as possible. Leonardo has to deal with workflow challenges that are very similar to those faced by Nancy and Sue.

✓ New Sales Order: Today, when Leonardo closes a new deal, he must fill out a lengthy Word document with client information (mailing address, email address, phone numbers, sales contact, services contact etc.), save it as a PDF, print/sign/scan it and email it to the client. The client must review the contract, print/sign/scan it, and return it to Leonardo. There's almost always some back and forth to correct items in the contract and it's normal for the process to take weeks.

✓ Up-Sell Services: ACME and Leonardo know that it's easier to up-sell additional services to existing customers. But, when that happens, guess what? Leonardo is forced to fill out the same lengthy Word document where he has to re-enter all the client information even though ACME has it in their SQL database. The same email based process must be followed again.

✓ New Client Onboarding: This critical process is particularly prone to breaking down since it crosses so many departments. Once the contract is signed, Leonardo has to notify Nancy in Finance. She bills the client (see the Invoicing process above). Once the required deposit has

been paid, she notifies Leonardo and Paul who's responsible for delivering the services. Obviously, this process must function smoothly otherwise services are delayed ACME will end up with unhappy customers.

Leonardo and Paul are millennials and tech junkies. Both have smart homes, the latest gadgets, love Uber and Venmo and the convenience of the latest smart apps. To them, the internal sales processes are ridiculously cumbersome and unacceptable. They corner Will at lunch one day and pointedly question their I.T. Head. "Why", they ask, "can't we use our smart phones to fire off a sales order even when we're traveling? Why can't it pull stuff from our CRM? Why can't Joe my customer sign using his phone. Everyone else is doing it."

Make Work Flow

Will's been getting an earful from Nancy, Sue, Leonardo and Paul. He hates shopping, loves his smart phone too and brags about how he did all his Christmas shopping from his couch on a single Sunday afternoon. Will's I.T. department is seriously strapped for resources and he'd love to save time by automating processes like:

- ✓ New Employee I.T. Onboarding: See the New Employee Onboarding process above. I.T. plays a part in this – purchasing a laptop, setting up software, network drives etc. Will would love to see this streamlined and as automated as possible.
- ✓ Trouble Tickets: When someone's keyboard stops working or they get locked out of their smart phone, it feels to them like the most urgent problem in the world. Will's team has to rush around trying to fix it. As with everything in ACME, this is a completely manual process – it's not even documented. People simply email or call around until the problem is resolved.
- ✓ Cloud-based document management: Will's team has recently purchased a cloud document management account for ACME. The idea is that ACME's various departments can save their files to the secure and centrally managed cloud and use its powerful search capabilities. The problem, of course, is the manual step of getting Sue and Nancy and Leonardo to upload the documents, name them properly, and save them to the proper folder.

Will knows that he simply cannot deliver on all these items with the current resources at his disposal using the current traditional I.T. approach to application development. It'd take years and, by then, would be obsolete. He's heard of these visual, do-it-yourself automation systems and decides to explore them.

Let's give frevvo a whirl

Will comes across frevvo's website and sees that hundreds of other companies have already benefited from using their Cloud to automate very similar workflows. He really likes that frevvo offers a fully-functional 30-day trial, offers free starter templates for many common workflows and claims to be very visual and easy-to-use.

Will asks Eric and Hari in the I.T. department to evaluate frevvo and picks the Sales Order process to start. Since this is a customer-facing process, they figure that's where they'll get the most bang for their buck. Wisely, he also involves Leonardo and Nancy from the very beginning asking them about their must-have and nice-to-have items.

Hari and Eric discover that frevvo already has a pre-built Sales Order template, which they install with a single click. It's got a form and some basic routing and notifications setup.

They watch a few videos, attend frevvo's free mini-training classes and quickly learn the product. They had to modify the form to rename fields, remove a few and add their own. That was all drag-and-drop and turned out to be a piece of cake. There were some calculations to be performed (subtotals, a grand total, taxes) but Will's team sees that frevvo has a Visual Rule Builder (VRB). They're able to point-and-click in a wizard to create rules that perform calculations. To make it even sweeter, they use the VRB to show/hide sections of the form so that only relevant parts are visible to the user.

Finally, they go in and tweak the workflow to fit their own process. Once again, this is a drag-and-drop visual experience and Eric/Hari find it to be a very straightforward modification.

They ask Leonardo to quickly try out the workflow. Leonardo whips out his brand-new iPhone and wants to first try it out there. To his shock, it just works and feels natural. He's already seriously impressed. After playing around for a bit, he gives them some feedback. The biggest suggestion is integration with ACME's SQL database so he doesn't have to re-enter client data.

Eric and Hari explore frevvo's options and notice that there's a Database Connector. Setting up and using this connector requires some technical knowledge but it's well within their skillset. They configure the connector with the necessary SQL queries and hook it up to the workflow. Now, Leonardo can select an existing client from a pick list and the form automatically pulls in the client information from SQL.

The first automated workflow is rolled out to production less than 2 months after the decision to use frevvo. Within days, as Leonardo, Paul, Nancy and their teams start using it on a daily basis, they have

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prohibited.

a few suggested improvements. Since the workflow was built without coding, Will's team is able to take in those suggestions and update the workflow immediately.

At the next management meeting, Will shares some of his conclusions:

- ✓ Speed: The I.T. department was amazed at the fact that they built an entire application and rolled it out to production in less than 60 days. It's never been done in ACME's history. Will knows that if he had relied on his existing formal process or worked with outside contractors, the same project would have taken many months and cost many times as much as the Sales Order application using frevvo.
- ✓ Mobility: The team loved the fact that they don't have to worry about different devices and form factors. Since frevvo uses responsive and progressive design techniques, the forms and workflow automatically work on all devices.
- ✓ Integration: They were able to integrate relatively easily with the internal SQL database. For the next workflow, they intend to attempt integration with their Cloud-based document management system. Eric & Hari have assured him that frevvo does have the necessary capabilities.
- ✓ Citizen Developers: While integration requires an I.T. resource, Will feels like many other team members could potentially make meaningful contributions. Easy-to-use features like drag-and-drop form design, and visual rules along with frevvo's included training, help videos and highly responsive customer support make him feel like this could be a company-wide platform.
- ✓ Cloud & Security: ACME has only recently dipped its toes in the Cloud waters with the document management system but Will and his team already feel confident about security. They're delighted that they didn't have to install anything for frevvo, won't have to worry about upgrades and have an SLA that guarantees uptime.

ACME's management is thrilled with the results of the first project. Nancy, Sue and the other departments can't wait to get started with their own automation and Will feels like he's finally in a position to respond to their needs.

Aero Communications automates everyday forms & workflows integrated with their SQL database

Customer Profile: Aero Communications Inc. provides customer-focused technology solutions to broadband and wireless providers, businesses, public venues, government facilities, and residential subscribers.

We were looking for a single, affordable solution that could address all our requirements. frevvo's modern, online system is easy-to-use, and meets our needs at a reasonable cost.

Live Forms is the best web-based forms & workflow solution on the market today for our needs."

Adam Wiener,
Applications Specialist

Business Situation: The company was using a number of paper, Excel as well as InfoPath forms for various day-to-day processes and approvals. They had a number of routine, everyday business processes such as Vehicle Inspections, Facilities Maintenance, Financial Forms and Warehouse Orders. Many of them require approvals forcing employees to email them around and print/sign/scan for approval.

In addition, the existing forms could not pull data from SQL databases resulting in excessive and duplicate data entry, errors, corrections and inefficiencies.

Aero wanted to deploy a single affordable, Cloud-based solution that worked for all their forms, workflow and signatures, integrated with their SQL database and Azure Active Directory and offered capabilities suitable for real-world business requirements.

Solution Summary: Aero Communications considered a dozen+ solutions before selecting frevvo Live Forms because it provided an easy-to-use solution that works with their database, and integrates with Active Directory at an affordable cost.

Using Live Forms, Aero has replaced multiple forms and workflows with fully automated online versions. Using Live Forms' built-in Database Connector many of these forms and workflows are integrated with SQL and can dynamically update with real-time information from the database such as Customer or Product data. Automation speeds up approvals and improves efficiency.

Another example is Financial Forms which need to be filled out over an extended period of time. Locations fill out an Invoice Projection Tracker that is updated multiple times using Live Forms' built-in Save-Load capability before being submitted.

Aero has also deployed (or will shortly deploy) several other workflows such as a Facilities Maintenance Ticket Form (e.g. leak in the ceiling notifies the Facilities department), PTO Request, Safety Compliance and Warehouse Order forms.

Benefits:

- Integration with Aero's SQL database enables the forms to auto-populate fields. With large forms, this saves a tremendous amount of time and reduces errors.
- Users save time by eliminating the need to download/email for signatures.
- Live Forms provides end users with a fantastic user experience. Users find it easy to use and are more likely to adopt these new solutions as a result.
- Integration with Azure Active Directory ensures that users can continue to use their existing, familiar login credentials.

Escalations and reminders assure that approvals are handled in a timely manner reducing delays and improving the efficiency of the organization.

Chapter 4: How should we choose the best solution for us?

After reading the previous Chapter, you may be tempted to dive in head-first and automate everything in sight. It's wise to have a plan in place so you consider your unique business needs and choose the best product for you. Here are 11 things you should pay particular attention to:

Amazing User Experience (UX)

UX is the #1 thing we would advise you to look at. Remember that your employees are also consumers who use mobile apps every day. They're used to intuitive user interfaces, 24x7 access, any device, anywhere. If your apps have yesterday's look & feel, forget about getting people to use them. You'll only end up rapidly building shelf-ware.

Usability

Ok, this is closely related to UX above but we can't over-emphasize usability. It's not just about a slick user experience. Consider also:

- ✓ Speed: People love systems where they don't have to wait around
- ✓ Sensible Terminology: Make sure your buttons, labels and messages are familiar and helpful. For example, if the workflow routes to the CFO, the button should say "Send to CFO" and not something generic like "Continue".

- ✓ Help Text: Some fields require further explanation and a label is not enough. Take the time to add help – it can make a huge difference. Tooltips and placeholders are other options.
- ✓ Consistency: A big part of usability is consistency. Buttons should be in the same place, labels should follow consistent conventions, the look & feel should not vary dramatically from one process to the next.

Mobility

Make absolutely certain that the solution automatically supports mobile without additional coding. And, it should be designed with specific attention to mobile – not just throwing together a responsive web page. For example, buttons might need to be slightly larger on mobile so they're easier to click using your finger. Forms may need to be broken up into multiple pages to avoid overwhelming smaller screens.

Visual Tools

Do you want the "citizen" developers in your organization to contribute to automation? Intuitive, visual tools with drag-and-drop capability that empower all users are a must-have. Even if you expect that I.T. will develop most workflows, you should still look for visual tools. The earlier you can involve business users in the process, the more likely it is that you'll build solutions that meet their requirements and get adopted.

Integration

Automated forms and workflows are simply more useful if they can work with data from your databases, cloud and other internal systems. Make sure that any solution you're considering has flexible integration approaches that'll let you integrate with your systems even if you aren't planning any integration in Phase I.
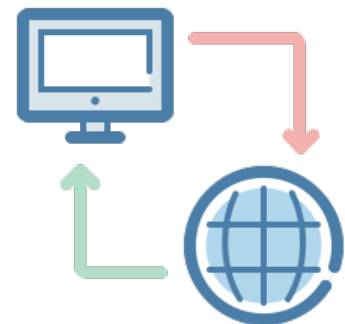
Dashboards

Automation is just the first step. Your platform should provide real-time reports and dashboards that allow you to measure performance and identify bottlenecks. How long does the average Purchase Order take to complete? Does it get stuck at a particular step e.g. is the CFO unnecessarily taking days to approve? Are users committing the same error over and over again? Perhaps, a small modification could make a big difference.

Start Small & Simple

Like the ACME example above, it's best to begin with something useful but simple. You'll avoid wasting time and resources and probably learn what it takes to introduce this technology into your organization. Taking an incremental approach that incorporates the lessons you learn is the best shot at a successful implementation

Involve them from the beginning

The earlier you get stakeholders into the process the more likely they are to adopt it. People are naturally more invested in a solution that they've had a chance to impact. Soliciting feedback and actually implementing suggestions are critical elements.

When we work with customers on a new project, we go to great lengths to set this up. We spend time upfront to make sure we're building something users want and make sure there are at least a couple of UAT-Change Request Implementation cycles. That way, the people who have to actually use the new system can affect it.

Training/Feedback

End user training should be part of every rollout. But, it's just the first step. Once people have used the new system for a period of time, they'll have feedback for you. It's worth going back and actually talking to stakeholders

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– is this helping you? Are you doing less manual work? Do you genuinely have more time for things that matter? What can we improve?

Iterative Improvement

Once people tell you what you can improve, it's important to go back and actually address issues as quickly as possible. Nothing's more frustrating than getting it 90% right only to see users abandon your system because you overlooked a couple of things.

Measure ROI

Make sure that you spend the time to measure the time & cost savings of the automated process and compare it to the time & cost of the automation project itself. How long will it take you to recoup your investment? How much money will the automation save you? With a visual platform using citizen developers, you might be amazed at the potential cost savings.

Obviously, you want to prioritize automation workflows with the highest ROI.

Communicate Success

 Share meaningful success stories with everyone involved in the system. Recognizing people's efforts (company meeting, spot awards) in bringing change to the organization will always be appreciated as long as you don't overdo it and the recognition is for real measurable gains.

Should you choose frevvo?

Hundreds of customers have already chosen frevvo's easy-to-use, visual platform for their workflow automation needs. The built-for-business solution includes:

- ✓ Visual form and workflow designers, point-and-click wizards for connecting to systems and a powerful visual rule builder for easy dynamic forms.
- ✓ Fast, beautiful UX. Customers love the look & feel of the forms and workflows.
  The UI is highly configurable – labels, buttons, help text, styles, layout and decorators.
- ✓ The platform is specifically designed for mobility. Your forms and workflows will automatically work on smartphones, tablets and desktop computers and include mobile-specific touches like larger buttons, bigger fonts, and natural portrait/landscape behavior.
- ✓ It's easy to connect to your SQL databases, SharePoint, Google Apps, and a variety of other back-end systems. In most cases, you simply use point-and-click wizards.
- ✓ We pay great attention to security. From secure data centers to secure networks to secure storage and transfers, our multi-layered approach keeps your data safe.
- ✓ World-class Customer Support and Training is a high priority for our team. We'll make sure that your workflow automation projects are rolled out successfully.

frevvo

Learn more at https://www.frevvo.com