



Workflow Automation:

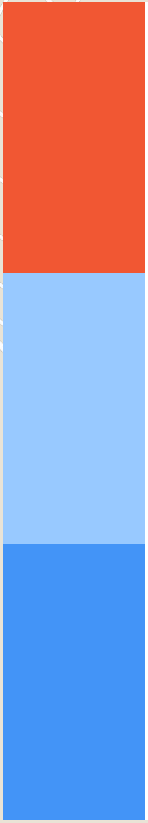
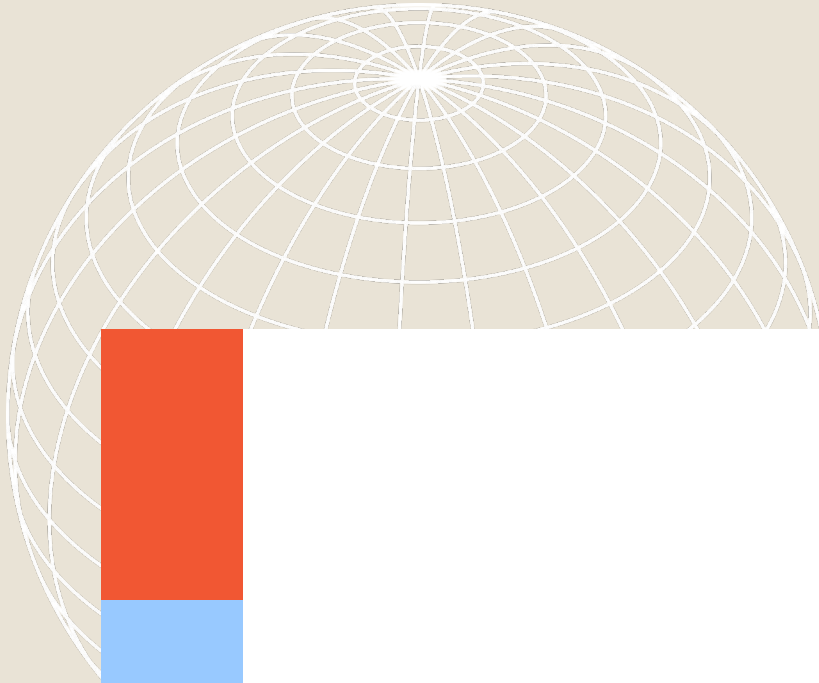
# 5 Myths to Dismiss Today



POWERING **DIGITAL TRANSFORMATION**  
SINCE 2008

# TABLE OF CONTENTS

3	Introduction
7	Myth One – People
11	Myth Two – RPA
15	Myth Three – AI
20	Myth Four – Expensive
24	Myth Five – I.T. Skills
28	12 Essential Workflow Features
31	Final Thoughts



# INTRODUCTION

---

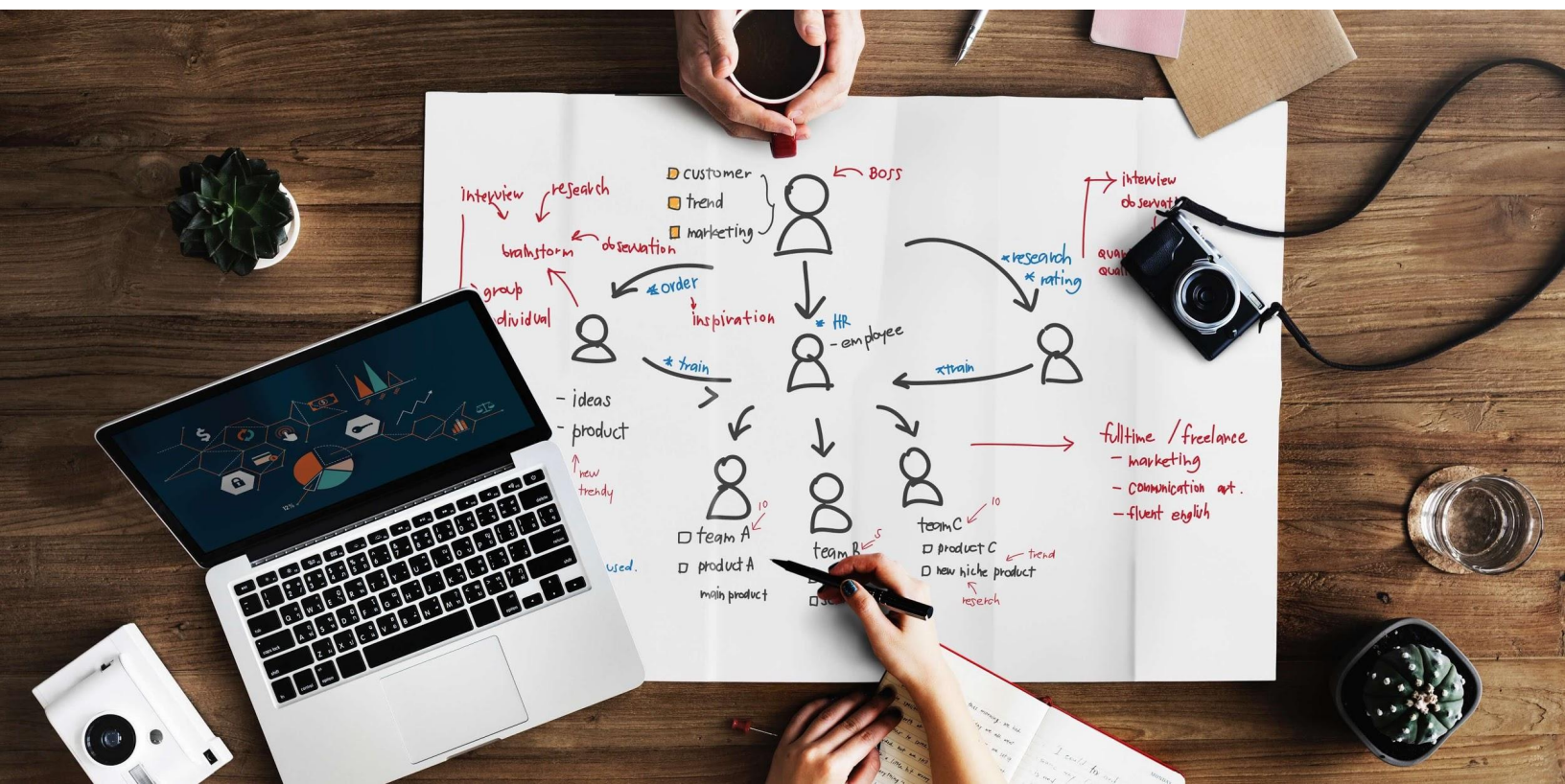
# WORKFLOW AUTOMATION LETS EMPLOYEES FOCUS ON WORK THAT MATTERS

---

A workflow is an activity that someone in your organization performs on a routine basis to achieve a well-defined goal. Workflows are characterized by (i) a series of repetitive tasks and (ii) flow of data.

[Common workflow examples](#) used everyday across every business include purchase order processing, time off request approvals, travel reimbursements, and new hire onboarding.

Today, almost every business understands the benefits of automation. They don't want employees to waste valuable time on paperwork.



---

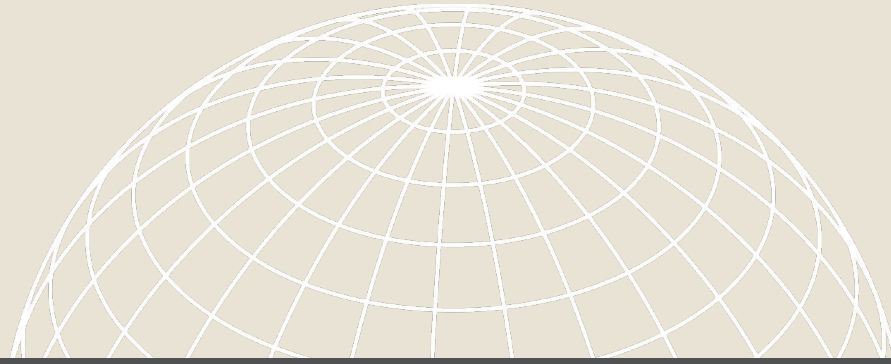
# CHOOSING THE RIGHT SOFTWARE IS NOT EASY

---

How exactly should businesses automate everyday processes? Analyst firms and vendors have created confusion with terms [and associated acronyms] like Business Process Management (BPM), Robotic Process Automation (RPA), Digital Transformation (DX), and others.

Customers have a wide range of options to choose from but it's confusing. Let's clear up some common misconceptions.

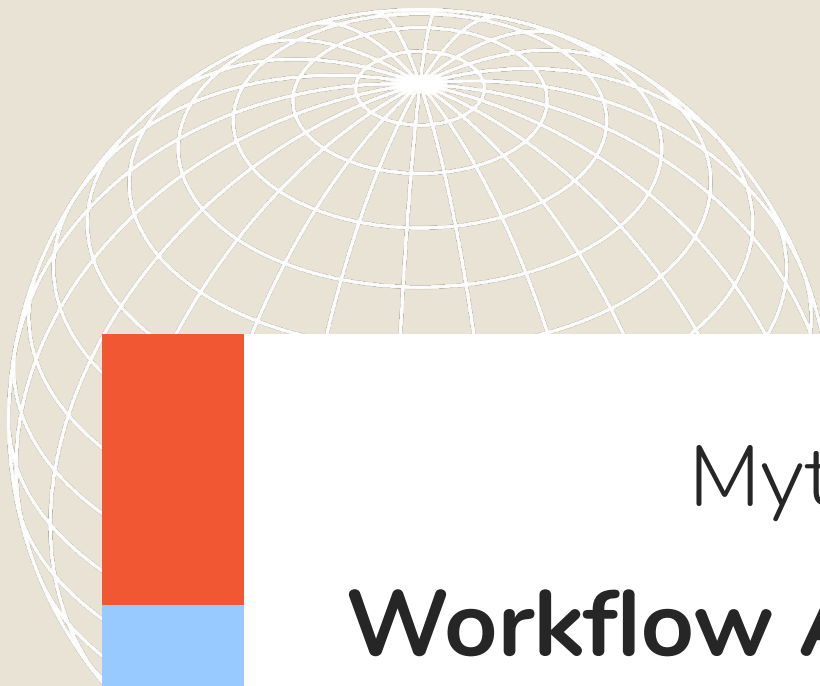




Reading about workflows for the first time? Click the button below to read our article:

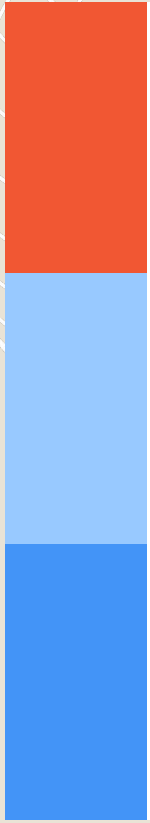
“What is a Workflow? Everything you Need to Know with Examples”

[TAKE ME TO THE BLOG!](#)



Myth One

**Workflow Automation is  
About Taking People out  
of the Process**



---

# FACT: WE'VE BEEN AUTOMATING WORK FOR CENTURIES

---

From farming to spinning cotton to word processing to electronic workflows, humans have been reaching for productivity improvements in every aspect of our lives.

The fact is, we're still here and we're busier than ever. To be sure, what we do has changed over time and will continue to change. We expect this change to accelerate in the future.

But how many of us want to go back to manually ploughing fields or to use a more recent example, squinting at maps on the side of a country road trying to figure out where we are? Today, machines do the ploughing and spinning for us, and machines figure out how we can best get to where we want to go.





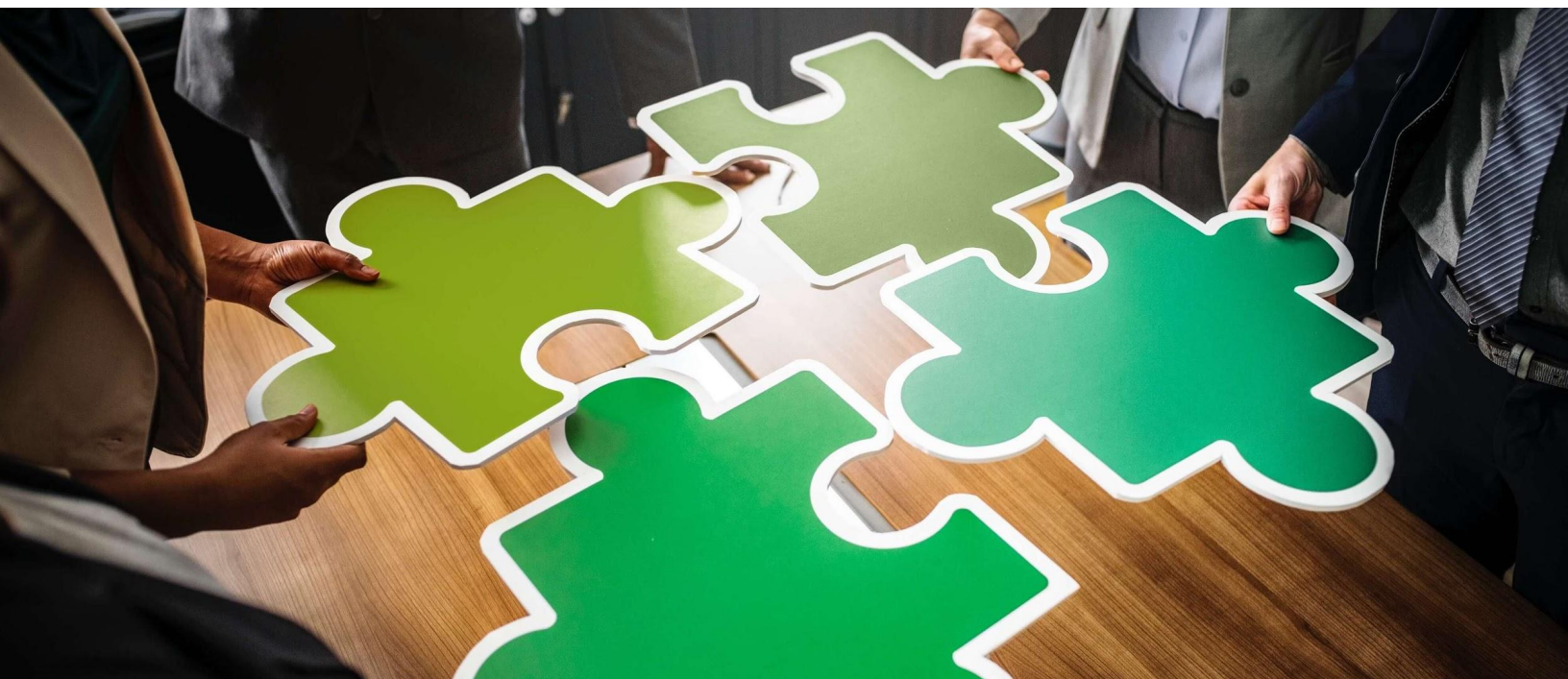
---

# IT CREATES CHALLENGES ...

---

Undoubtedly, there are big challenges on the horizon. Employees must accept the “continuous retooling” of skillsets.

Employers and employees alike will need to adjust to work that gets done remotely by a mix of full-time and freelance workers. Throw automation into the mix for routine tasks and work gets increasingly sophisticated marrying talent and technology to achieve unheard of productivity.



---

# ... AND OPPORTUNITIES

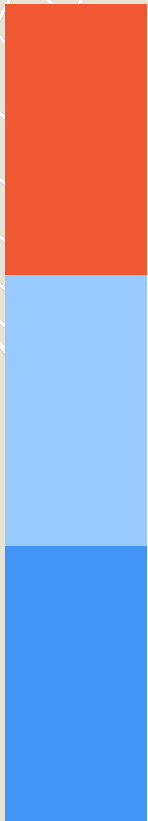
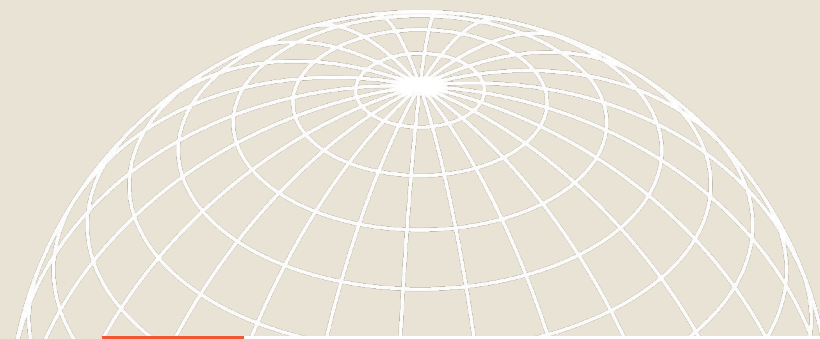
---

The benefits to people are astounding. It means we get to spend our time doing more of the interesting, valuable and uniquely “human” things. Teachers get to focus on students rather than paperwork. Doctors can spend more time with patients rather than forms.

In a typical business, it means that the procurement department can improve relationships with sustainable suppliers rather than chasing down a PO. The HR department can attract and retain talent instead of verifying onboarding forms.

***Workflow automation, in short, empowers people to do more of the work that matters.***





Myth Two

**Workflow Automation is  
the Same as Robotic  
Process Automation  
(RPA)**

---

# FACT: RPA AND WORKFLOW AUTOMATION ARE DIFFERENT

---

RPA uses software bots to literally imitate mouse clicks and data entry that humans perform to interact with systems. It's like an Excel macro for mainframe screens or web browsers. RPA automates individual tasks.

Workflow automation, in contrast, is about the overall process and not just individual tasks. It's about better decision making, an improved customer experience, and collaboration rather than faster data entry.



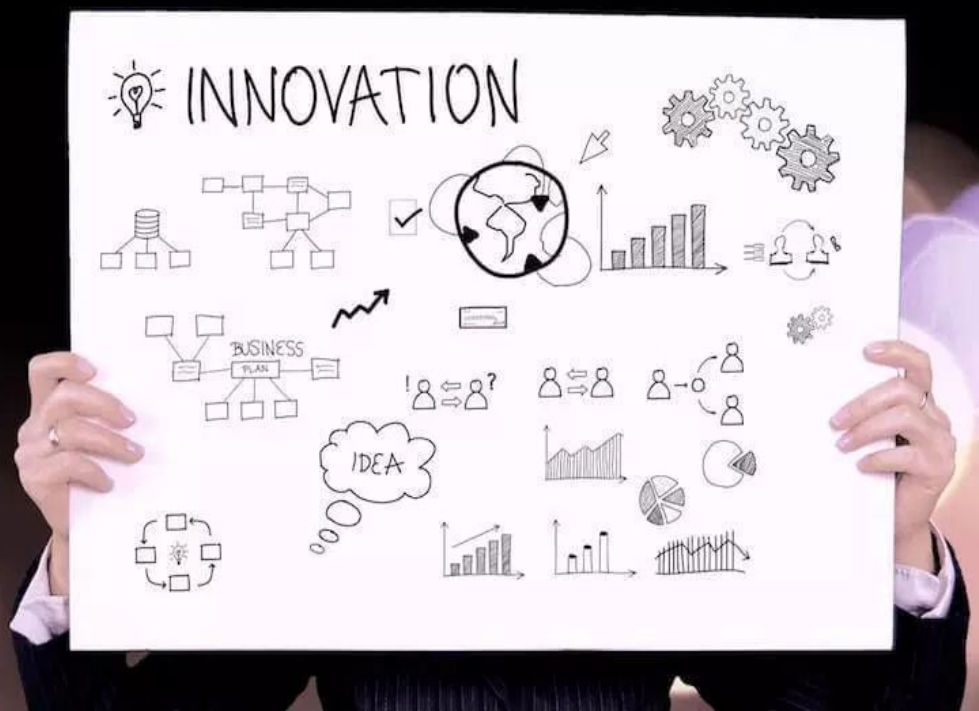
---

# RPA IS A TACTICAL SOLUTION

---

To be sure, RPA has many benefits particularly for insurance companies, utilities and other entities with large back office / data entry operations.

Yet, it has many limitations. It's very reliant on the UI – a slight change to the UI breaks RPA. Ironically, RPA is also a long-term deterrent to modernizing the underlying legacy system. That diverts attention from strategic transformation with far greater potential benefits.



---

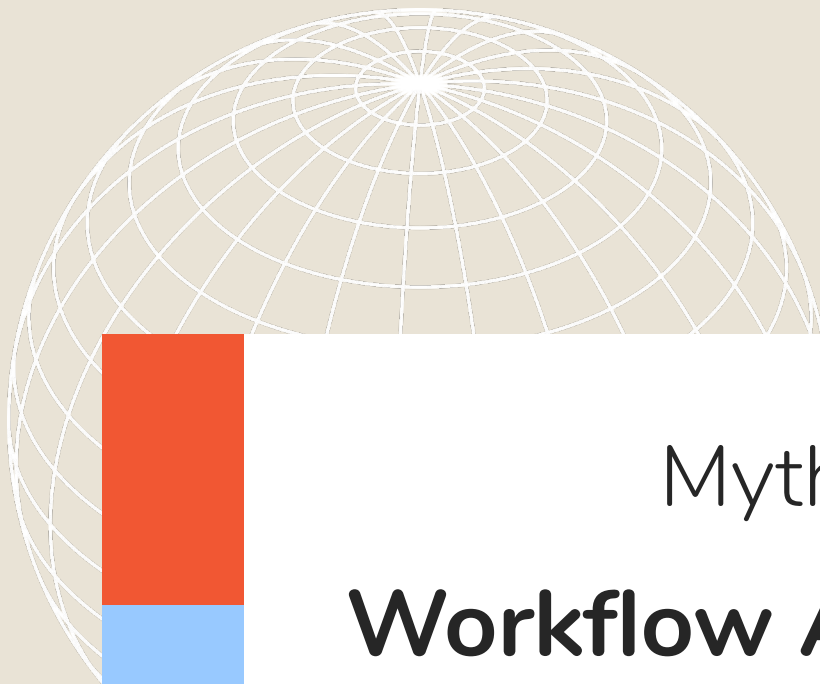
# WORKFLOW AUTOMATION IS A STRATEGIC INITIATIVE

---

Workflow automation is certainly not an elixir. If the underlying process is fundamentally unsound, you'll just end up with a bad process that runs faster. But, workflow automation is a strategic initiative – it frees up talent to focus on the important stuff, it digitizes data so you can deploy ML and AI technologies, and helps you bring your back office closer to the customer so you can deliver a world-class customer experience.

Automated processes may include an RPA component but the two are different.





Myth Three

**Workflow Automation is  
the Same as AI**

---

# FACT: AUTOMATION AND AI ARE RELATED BUT DIFFERENT

---

***Automated systems follow preset rules while AI attempts to mimic human behavior.***

Automation has many forms – the cotton gin separated the seeds from cotton without human intervention. It saved millions of hours of back-breaking labor. Modern assembly lines are a marvel of automation – machines are used to operate other machines resulting in unprecedented productivity gains.





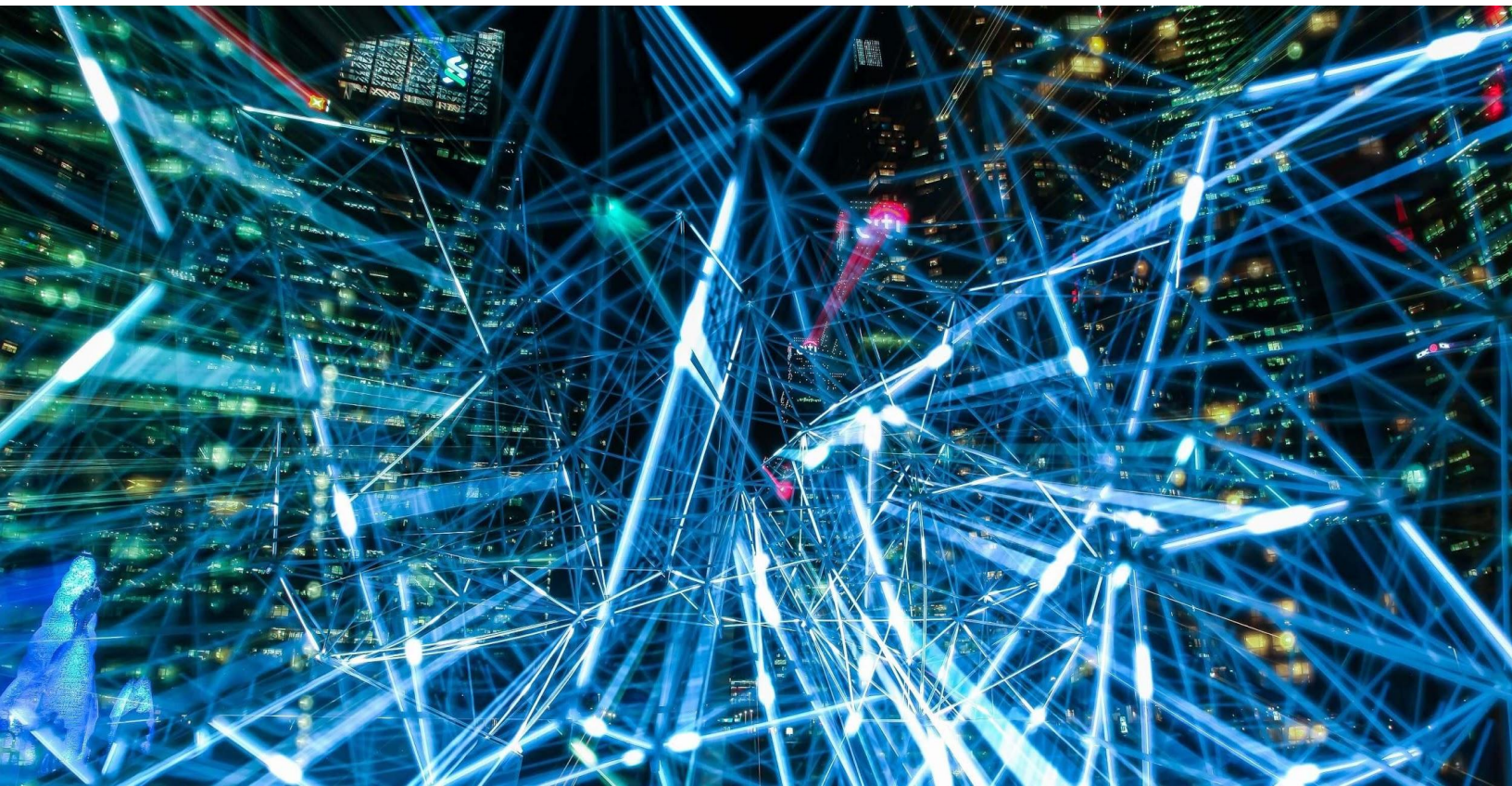
---

# AUTOMATED SYSTEMS HANDLE REPETITIVE TASKS

---

Software-based automation frees humans from tedious, manual tasks. They may not involve physical labor (picking cotton) but they're boring and repetitive. With automation in place, people can do the more interesting, engaging and valuable things.

Workflow automation essentially takes a set of predefined and repetitive tasks and does the same set faster, and with fewer errors.



---

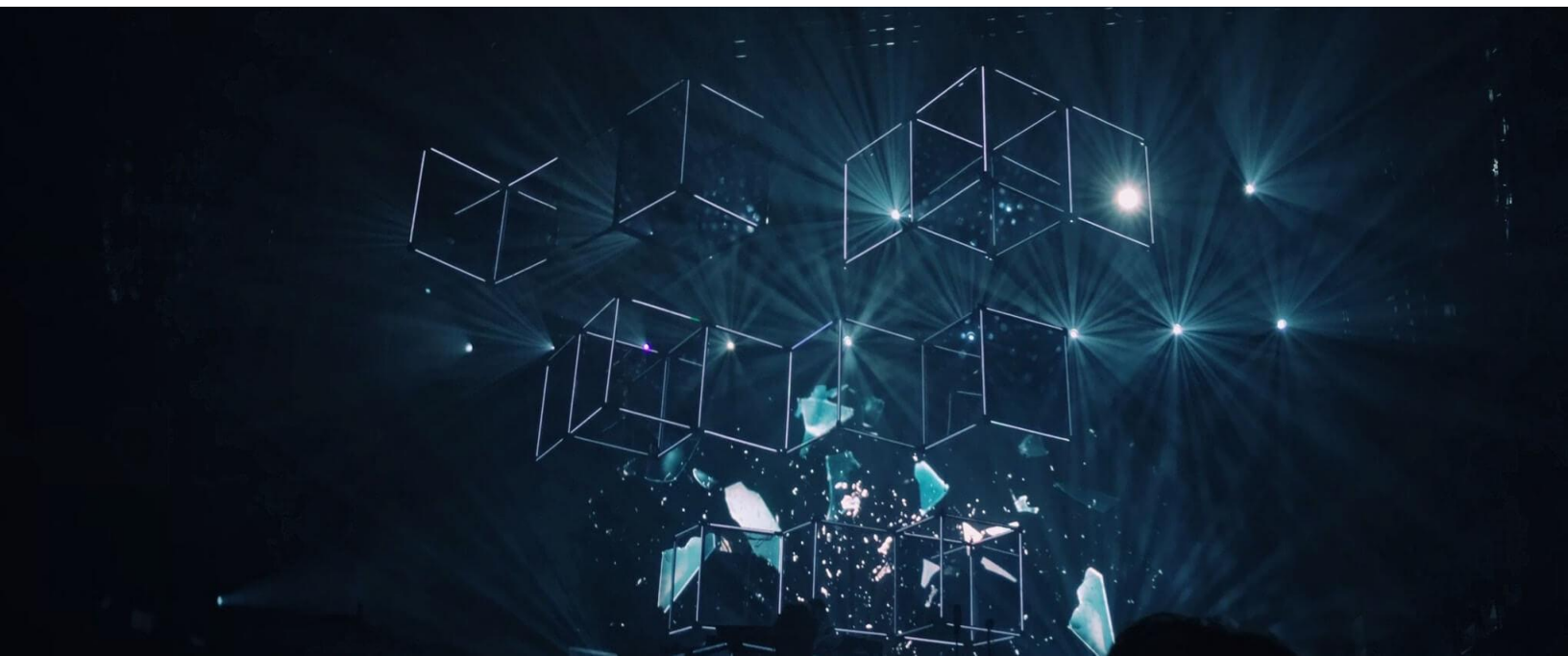
# ARTIFICIAL INTELLIGENCE LEARNS FROM EXPERIENCE

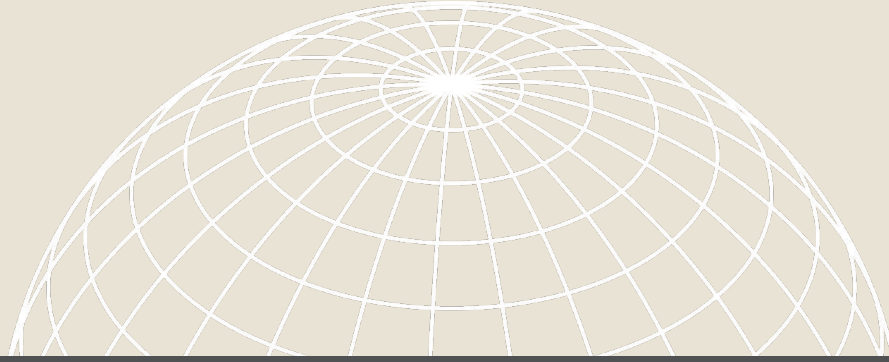
---

In contrast, AI tries to achieve tasks by learning from experience rather than following a pre-set path. It relies on analysis of large data sets using machine learning (ML).

Everyday processes in your organization generate your proprietary data in digital format. Machine Learning software analyzes this data. Artificial Intelligence relies on this analysis to learn.

No wonder organizations are [rushing to adopt a data-first approach](#).

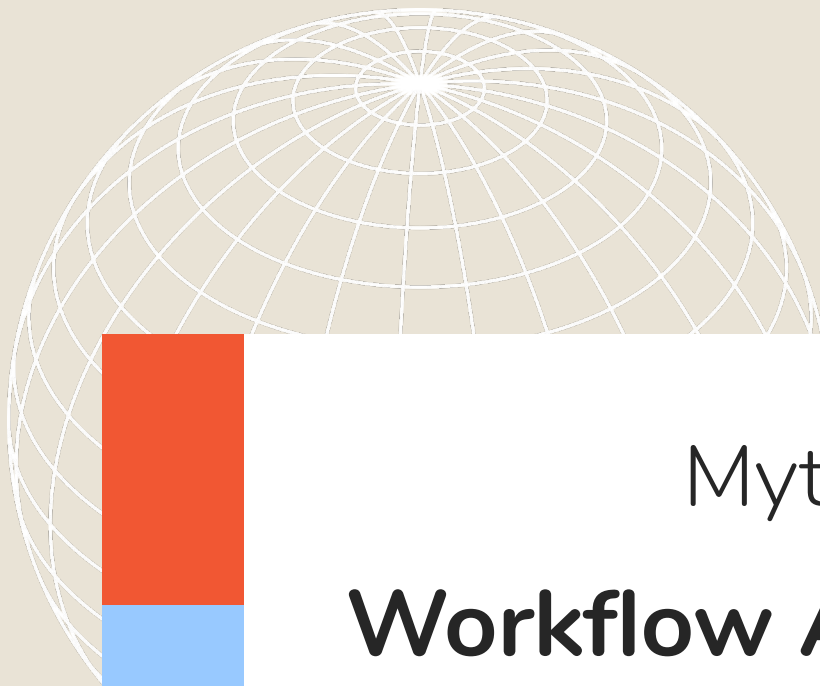




Want to learn more about the differences between Automation and AI? Click the button below to read our article:

“Automation and AI; What’s the Real Difference?”

[TAKE ME TO READWRITE!](#)



Myth Four

**Workflow Automation is  
Expensive and  
Takes Months**

---

# FACT: CLOUD-BASED SYSTEMS ARE MORE AFFORDABLE THAN EVER

---

Historically, BPM software from vendors like Oracle and Appian has been expensive and complex. These are often million dollar projects that take 6-12 months before anything is actually automated.

But, that's no longer the case. Modern software like frevvo is amazingly affordable. Cloud-based systems often have no long-term contracts, start at a low monthly price and offer free trials.

## Automation Delivers Astounding ROI!



---

# START SMALL BUT START **NOW!**

---

It's easy to start small and, in fact, I recommend doing so. Pick a process that involves multiple stakeholders and that employees perform reasonably frequently. Digitize this process and deploy it to a small group of individuals. In many cases, you can get at least a prototype working in just a few days.



---

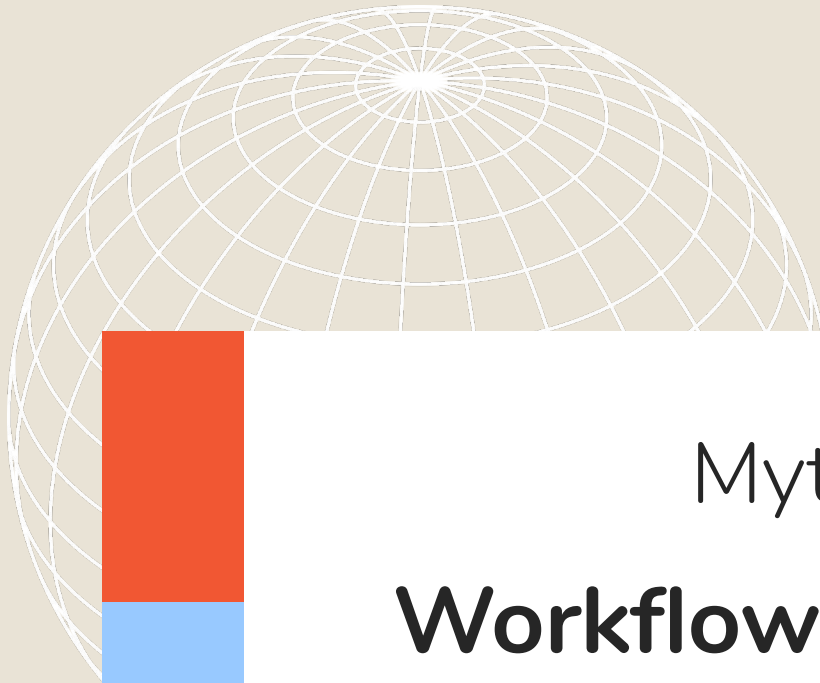
# ITERATIVELY IMPROVE THE PROCESS

---

After people have used it for a while, solicit their feedback. Users will tell you what's working and what's not. Once you have feedback, it's important to actually go back and implement it. When your users are invested in improving the process, they're more likely to adopt it.

Iterate in this manner and you might be surprised to find out that workflow automation is really not that expensive and doesn't take months. In most cases, the ROI is amazing.





Myth Five

**Workflow Automation  
Requires Skilled I.T  
Resources**



---

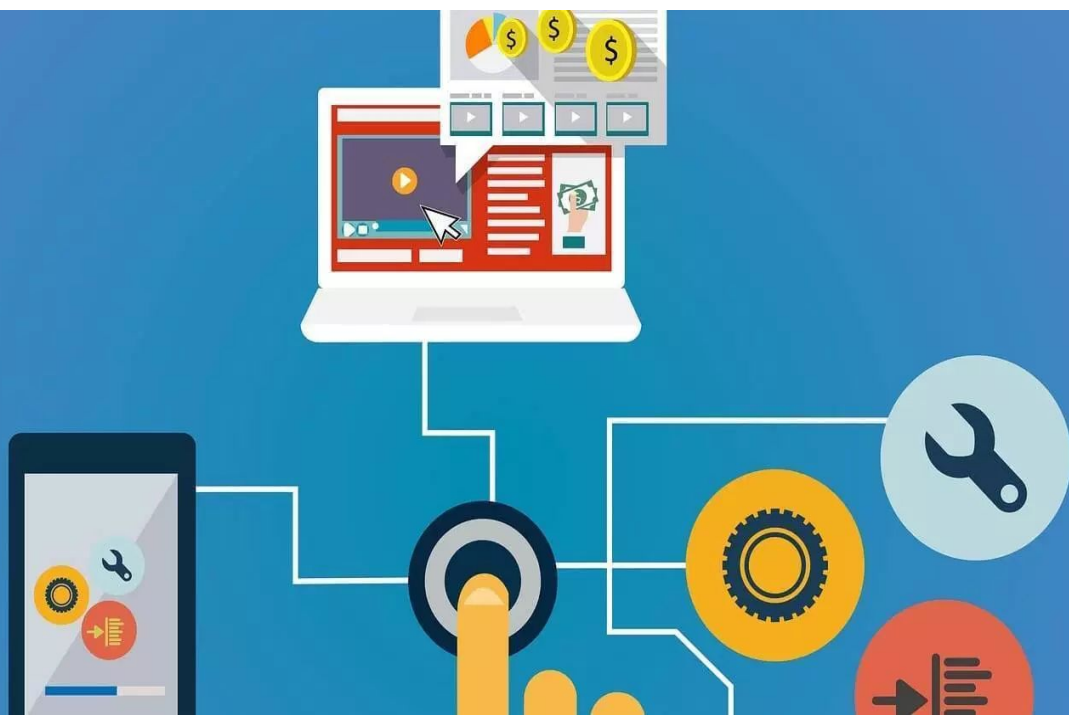
# FACT: **ANYONE** CAN USE TODAY'S MODERN, VISUAL SOFTWARE

---

The good news is that workflow automation no longer requires scarce and expensive programmers.

Modern, visual platforms like frevvo offer solutions that anyone can use to automate everyday processes.

Citizen developers, who are not coders-by-trade, can use a low-code automation platform like frevvo to easily automate everyday purchase orders and vacation requests. That helps you bridge the I.T. skills gap even as a small company with limited access to skilled programmers.



---

# THE SPEED AND ROI OF AUTOMATION ARE ASTOUNDING

---



[Central Wyoming College digitized their purchase order approval process in less than 10 days of work.](#) It looks great, works on mobile devices, meets business requirements, and they didn't need to hire pricey coders.

It's hard to imagine anyone coding an app as sophisticated as this in just 10 days.

[At Tailored Brands, a team of just 2 people has deployed 100+ forms in their 1400+ stores](#) in the US and Canada. End users get a fantastic user experience, the forms work automatically and mobile and dramatically improve efficiency.

It's hard to imagine such a small team producing this much with programming.

[\*\*View More Customer Case Studies\*\*](#)

---

# AUTOMATION IS ABOUT PEOPLE

---

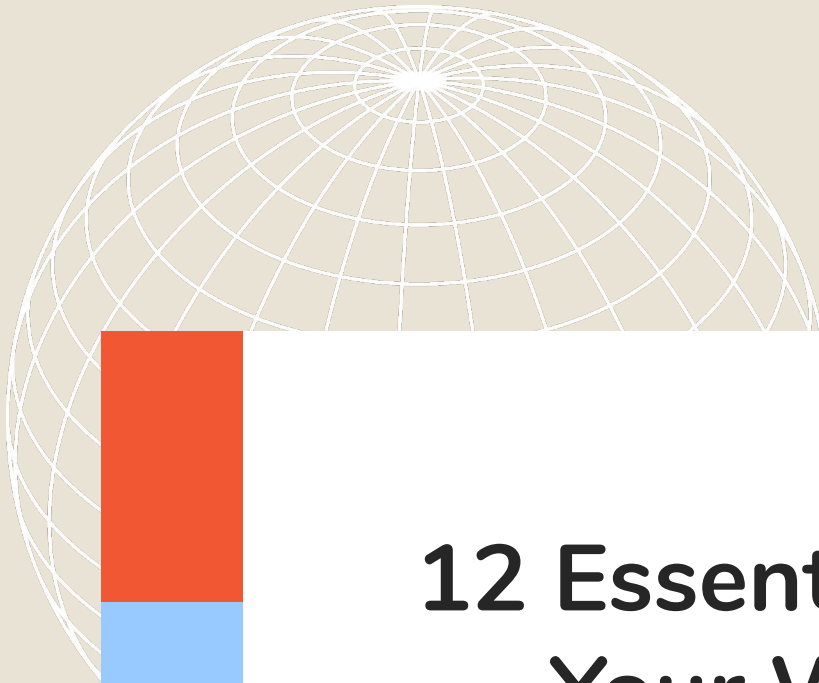
Today's workflow software market is rife with confusion. Should you worry about digital signatures or artificial intelligence? Robotic process automation or machine learning? There's a lot to consider.

The facts are clear. In spite of all the hype, automation is primarily about people and what they do every day. Automation technology has been improving for centuries and will continue to do so. That's a good thing – it means we humans have to deal with fewer tedious tasks and can spend more of our time on the interesting stuff.

Workflow automation is not the same as RPA or AI. They're all connected technologies and each has its place in the business. RPA is a tactical solution for individual tasks. AI has vast potential but is still in its infancy. It also relies on digital data that workflows generate. In contrast, workflow automation is a strategic today-initiative that'll help you perform better today and compete better tomorrow.

Finally, there's no reason to delay. You can and should start small – pick a reasonably frequent process that involves multiple stakeholders, digitize it quickly, roll it out to users and iterate.

Now, let's take a look at some of the essential features to look for in the software of your choosing.



# **12 Essential Features Your Workflow Management System Needs**

---

# CHOOSE WORKFLOW SOFTWARE FOR THE LONG-TERM

---

There are many workflow automation platforms to choose from. Consider your processes to understand what your specific business requires.

We've seen that the 12 capabilities below are vital if your platform is going to satisfy business needs over the long-term.

1. Zero Code Workflow Design
2. Drag & Drop Form Design
3. Instant, Powerful & Automatic Validation
4. Easy, Visual Dynamic Behavior
5. Built-in Mobility
6. Notifications, Reminders & Escalations
7. PDF Generation
8. Integration
9. Security, Authentication & Access Control
10. Reports for Analysis & Optimization
11. Accountability – Audit Trail
12. Reasonable Pricing & Resource Requirements

---

[READ OUR BLOG ARTICLE](#)

---

# 6 MIN DEMO VIDEO

---

## SIMPLE VISUAL TOOLS

---

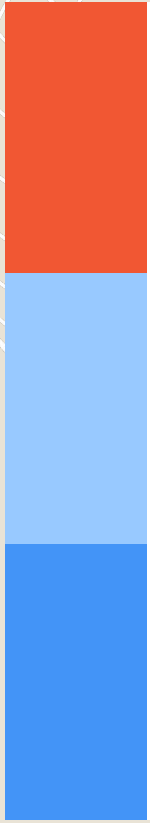
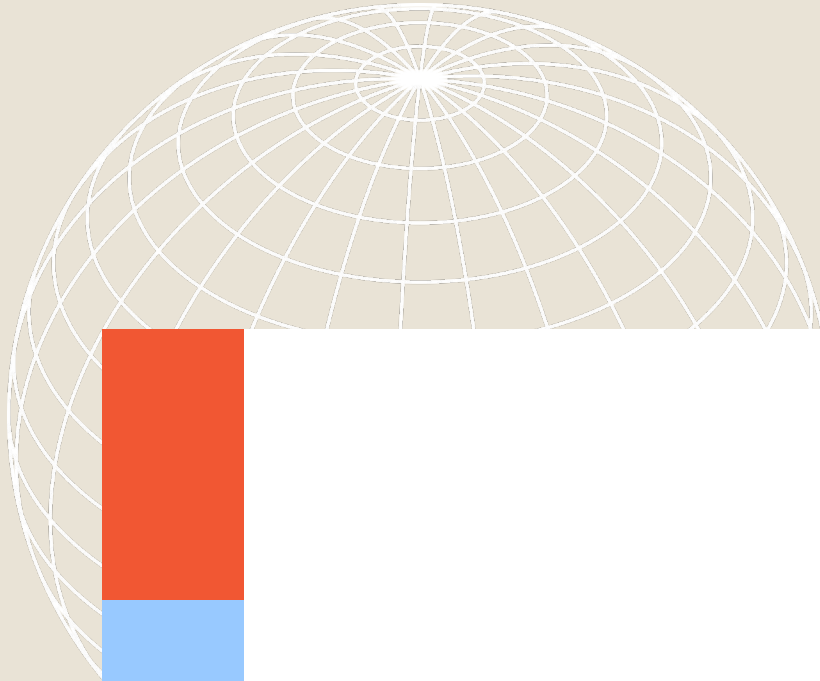
---

**100%**

**Drag-and-drop  
Designers**

**Point-and-click  
wizards**





# FINAL THOUGHTS

---

# WORKFLOW MANAGEMENT IS ESSENTIAL FOR MODERN ORGANIZATIONS

---

Workflow management is critical in today's fast-paced environment to stay organized and on top of your business and to improve productivity. It's important that you select the right one since this is a decision that will stay with you for a while.

There's no reason to settle for anything less than world-class. As you investigate options, keep the 12 critical features outlined in this chapter in mind.

Let us show you how frevvo can help you automate your own forms and workflows with our modern, cloud-based platform.

[Request a Demo](#)

