

# Process and Information Are the Engine and Fuel Driving Digital Business Today

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## A DCG INSIGHT BRIEF

### Digital Businesses Thrive on Streamlined Processes and Contextual Information


For decades, companies have invested in managing business processes and unstructured content. These initiatives have helped organizations compete in the global economy by differentiating products and services, keeping costs down, and responding more effectively to customers, stakeholders, and – in the public sector – citizens. Organizations now run their automated businesses by focusing on two key areas:

- **Process automation, to deliver operational effectiveness and efficiency across the enterprise.** Technologies include not only enterprise suites, packaged business applications, and bespoke/custom systems, but also business process management (BPM), case management, low-code, workflow, business rules, robotic process automation,

and – most recently – digital process platforms.<sup>1</sup> As a result of implementing these technologies, companies have reduced internal costs, collapsed wait times from weeks to days or minutes, removed waste and inefficiency from processes, increased operational efficiency by a factor of 3-5, and improved compliance.<sup>2</sup>

- **Information management, to manage content in every corner of the enterprise.** Organizations use software tools to create, update, manage, deliver, and archive a diverse mix of content, including web content, documents, collaboration threads, digital media, e-forms, images, correspondence, faxes, records, computer reports, engineering drawings, and analytics.<sup>3</sup> Investments have led to impressive results: internal teams are 25-50% more productive,<sup>4</sup> critical documents are more easily controlled, regulatory compliance is better managed,






and information on websites is easier for customers to find.<sup>5</sup>

Still, executives cannot rest on their laurels. Why not?

- **Content management alone is insufficient.** Internal automation that delivers value but separates process from content no longer suffices to meet customer expectations – content and process must be managed, integrated, and delivered to the customer in a seamless digital experience.
- **Customers use many information types and channels to communicate.** For example, a disabled worker interacting with an insurer over time engages in multiple ways, including e-forms that are retained in a case folder, scanned documents sent by email, mobile apps that send and retrieve information, and even documents that move by snail mail because of regulations. Phone calls are also an important communication channel.<sup>6</sup>
- **End-to-end processes are crucial.** What the customer (or the internal representative) touches and feels is only part of the entire business process. The organization must ensure that the customer engagement executes flawlessly end-to-end, **across and between the front and back offices.**<sup>7</sup>



Often, enterprises and small businesses give little thought to integrating process automation with their content solutions. For example, businesses relying on [Microsoft Office 365](#) frequently overlook the opportunity to integrate it with other process automation and content systems.<sup>8</sup> Or, workers handling customer correspondence often manage

their case files using document management alone, instead of integrating with process automation to create a comprehensive **case folder** that tracks and routes everything related to the case. Or, organizations fail to integrate content and process automation with enterprise applications, such as ERP and CRM. Because of limited scope or tunnel vision, enterprises sometimes miss significant savings by overlooking the potential benefits from combining business process automation and content management.<sup>9</sup>

Executives and business leaders responsible for automation would be wise to remember three mantras:

1. **Process is the engine that drives business.** Since the inception of modern business, organizations have operated through processes, whether highly structured (such as new drug approvals or contract management) or largely collaborative (such as brainstorming for R&D ideas or marketing concepts). Organizations that reinvent, automate, and continuously improve their business processes are more competitive and uniquely differentiated in their markets.
2. **Information is the fuel for business processes.** Information has limited value unless it is contextual to a business process. A customer's document has much greater value when seen and processed through the lens of a business action or activity, such as a customer request that needs attention and gets handled. Conversely, a business process that lacks information quickly grinds to a halt because it lacks the essential fuels of content and data.

3. **Integrating content and process provides more bang for the buck.** Organizations are more productive when they implement process automation and information management together rather than automating business activity through content management alone. (Figure 1 depicts process automation combined with unstructured content.)

**In the era of digital disruption, the customer is king**

Once Amazon, Google, and other internet start-ups became household names, the business landscape underwent cataclysmic changes that continue to this day. As businesses adopted new technologies with less than lightning speed and began lengthy efforts to remake themselves, start-ups seized upon radically different business models that enticed customers to leave slower-paced, less customer-centric companies. These trends have now brought us to never-ending digital disruption, in which companies constantly reinvent themselves to capitalize on new technologies and differentiate themselves with ever-better customer experiences.<sup>10</sup>

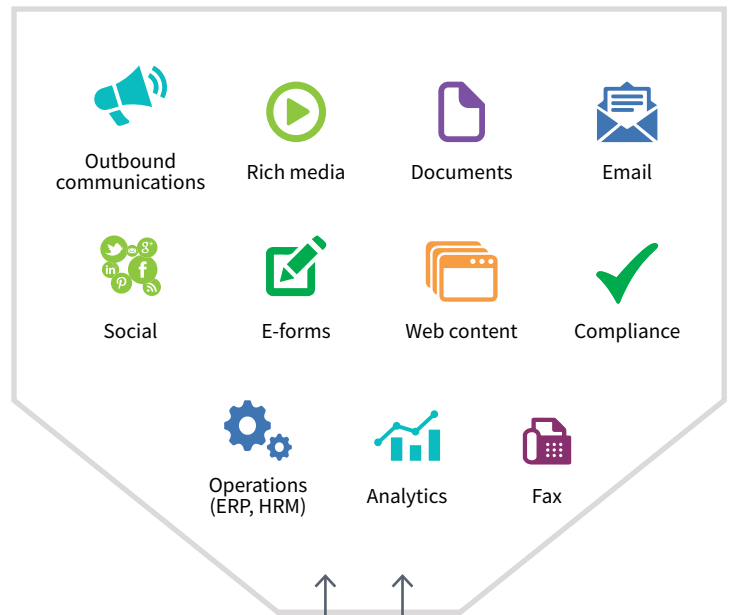
The complexity of this new landscape can be overwhelming, with a litany of technologies spanning digital process platforms, e-commerce, omnichannel, the Internet of Things, predictive analytics, machine learning, robotic process automation, low-code, and natural language processing.<sup>11</sup> **To avoid getting lost in the details, executives should follow two guiding principles:**

- **Connect customer experience (CX) and operational effectiveness (OPEX) efforts**

Figure 1 **The Two Key Components for Digital Business** 

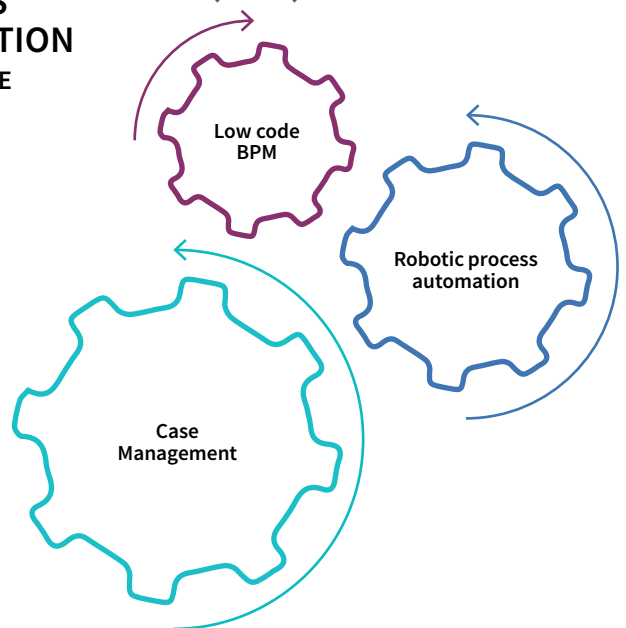
**INFORMATION**

is the **FUEL** that drives the business



**PROCESS AUTOMATION**

is the **ENGINE** that powers the business



to deliver on end-to-end transformation.

Although companies put tremendous effort into CX and OPEX projects, typically these are separate universes with separate project teams. Large-scale CX efforts fall short by failing to include internal processes, and OPEX projects miss the mark by overlooking customer experience when streamlining the back office. By combining these two efforts, organizations can transition to digital businesses.<sup>12</sup> This requires senior leadership because the skill sets, orientation, job responsibilities, and methodologies of the project teams vary greatly across the divide.<sup>13</sup>

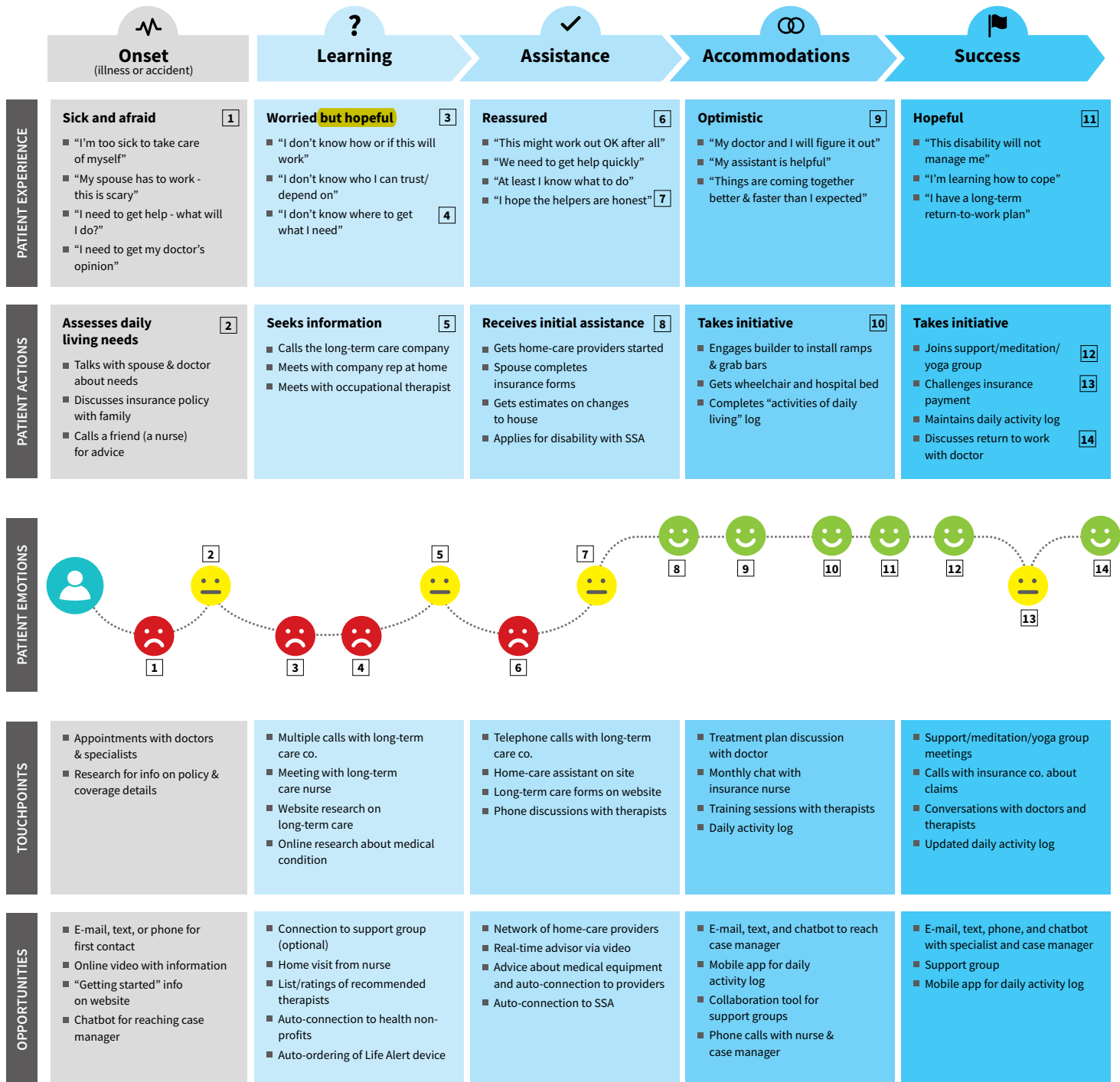
- **Drive the business engine with digital process platforms and fuel the business engine with information.** It's a simple mantra: information = fuel, and process = engine, and information + process = transformation. But it's easy to utter a catchphrase and harder to implement technology. Going forward, look to digital process platforms that combine low-code, BPM, case management, business rules, analytics, and robotic process automation to integrate with lighter-weight content solutions to speed the digital business. When transforming processes, always look at content within the context of business processes that consume it.

## Understanding the Customer Journey Leads to Great Experiences

As organizations automate more end-to-end business processes, project teams need expanded tooling to help analyze processes. In the past, Six Sigma, Lean, and Agile experts would use process modeling or enterprise architecture tools to capture the as-is or to-be process. However, this inside-out mindset neglected the most important participant – the customer! In a digital experience world, project teams must take an outside-in approach, starting with talking to customers in voice-of-the-customer (VOC) sessions. VOC feeds the next step – customer journey mapping sessions, which capture what the customer does throughout a process and how the customer feels at points along the way.<sup>14</sup>

Figure 2 shows a high-level customer journey map for a disability insurance customer who requires long-term care. Such maps help organizations decide how to best support customers with automation and human activities.<sup>15</sup> Organizations develop more detailed versions of the customer journey, sometimes creating hundreds of maps for multiple and complex end-to-end processes. Teams may create maps using any number of methods: post-it notes on the wall, tools they created, enterprise architecture or business process modeling tools, or online tools they buy or download for free.<sup>16</sup> Because journey mapping and process modeling are beginning to converge, business process practitioners must add journey mapping to their tools for business process transformation.

Figure 2  
**Sample Journey Map for a Disability Insurance Customer Requiring Long-Term Care**



## Digital process platforms simplify work through BPM, case management, low-code, and RPA

Business process management (BPM) software has undergone significant change over the last 12-18 months, as BPM has become faster and lighter to deploy, and has had new functionality added. Now called **digital process platforms**,<sup>17</sup> this expanded technology is a modern take on BPM suites. (See Figure 3.) Digital process platforms deliver value to companies using a process + content approach to transformation. The new platform includes BPM software, case management, low-code, business rules, RPA, content, and analytics. Here's a quick overview of the key components:

- 1. Business process management (BPM) software supports all phases of process automation**, including process design, execution, management, analysis, and improvement. The system uses round-tripping to input process analytics into the design **and/or** execution module for a continuous process improvement flow.
- 2. Case management automates unpredictable, content-intensive processes**, and excels with dynamic, long-running procedures. It allows teams to automate rapidly changing processes that support customer requests, exceptions, investigations, and incident reporting.
- 3. Low-code empowers business analysts and DevOps to automate processes faster.** Low-code platforms provide visual tools for developing the business process, while also adding custom code where needed, and integrating with existing applications. One of

the low-code approaches is **entity modeling**, which **speeds up process development by up to a factor of ten**.<sup>18</sup>

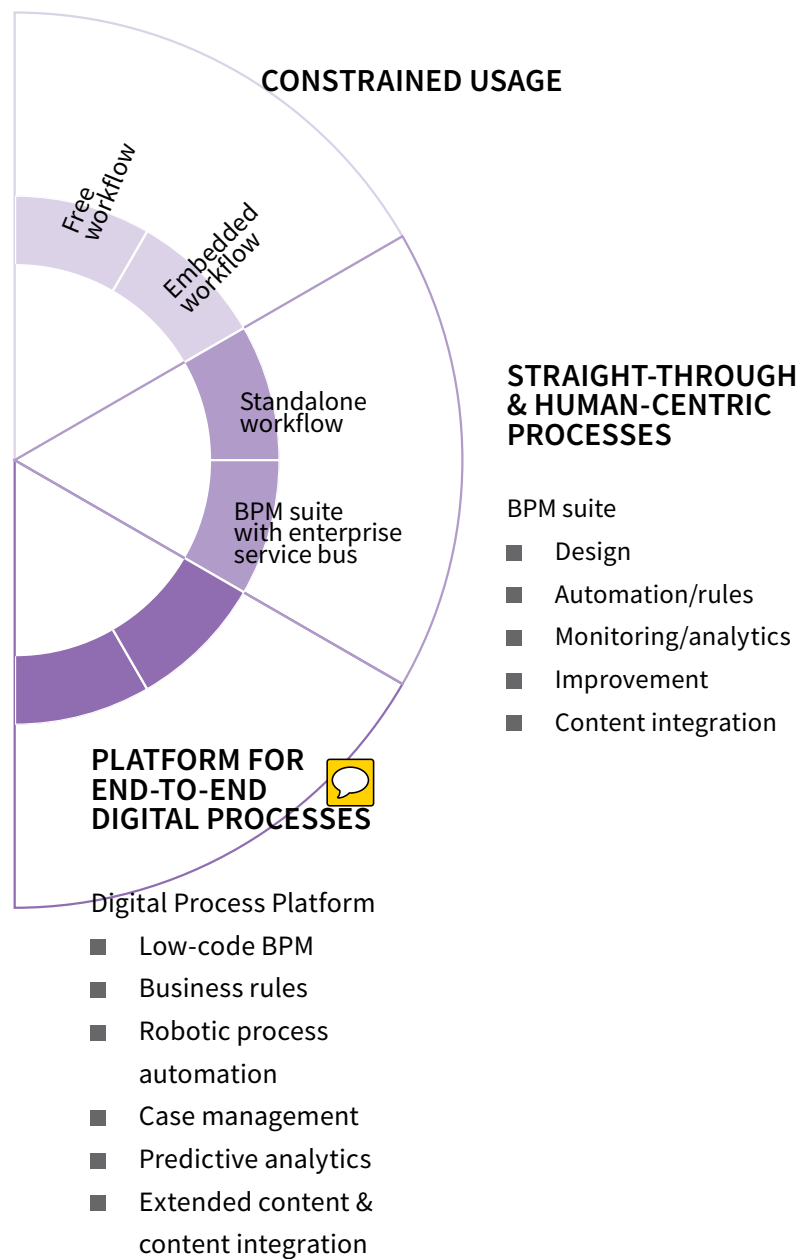
- 4. Robotic process automation (RPA) is a simple and affordable way to streamline and simplify routine work.** RPA software tackles monotonous, error-prone tasks that bog workers down and chip away at their productivity, such as sorting through emails or cutting and pasting information from documents into spreadsheets. RPA software uses static rules, objects, and scripting to tackle manual or semi-automated activities that are part of virtually every job.<sup>19</sup>
- 5. Business rules have long been a mainstay for executing business decisions within processes.** Business rules identify the constraints, while providing guidance and direction for business decisions. A simple example: route the work to Dept. A if the order is equal to or greater than \$50K; otherwise route the work to Dept. B.
- 6. Analytics track and analyze process execution data and can be used within the process.** Analytics have long been used in management reporting on process execution for key performance indicators (KPIs), such as rework or days-to-completion. Increasingly, digital process platforms include predictive analytics to identify next best actions to propose to customers.

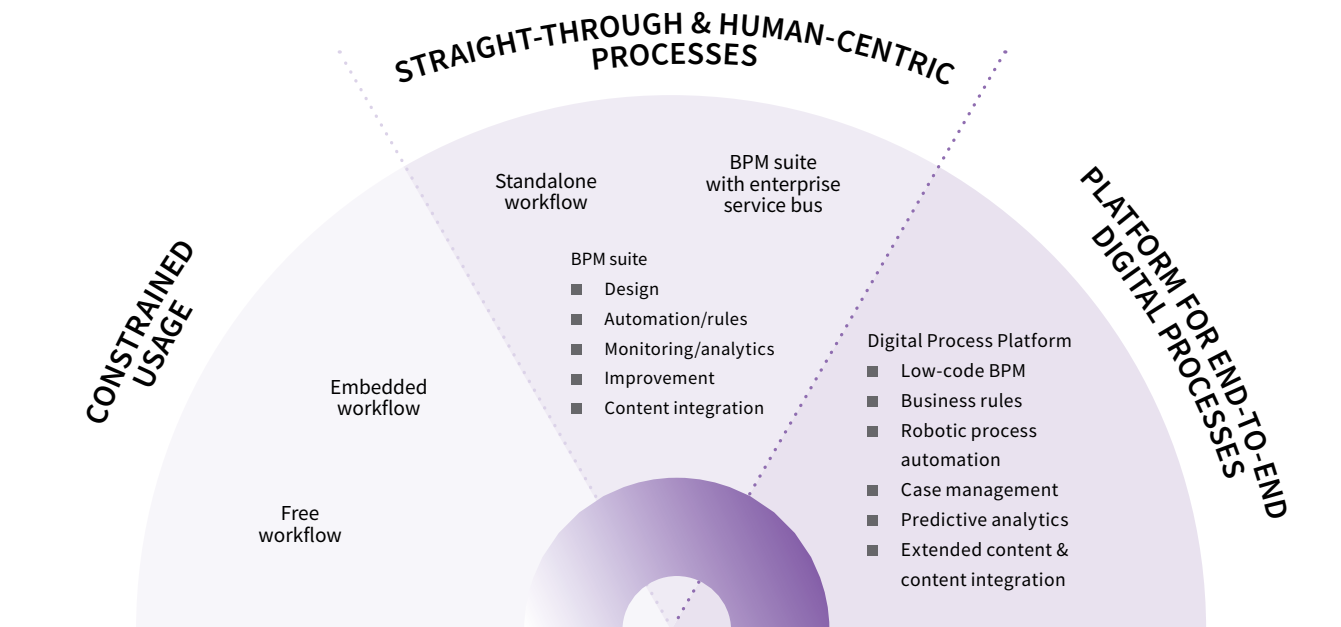
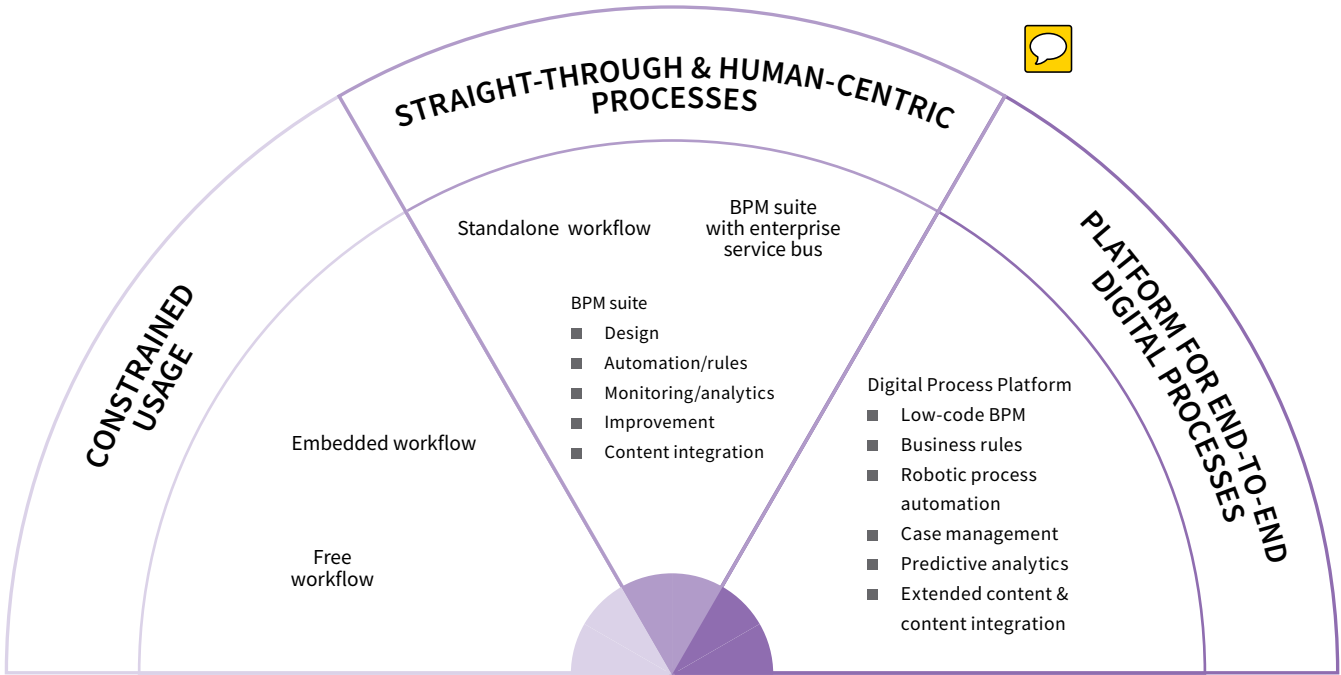
Over the years, process automation has evolved from embedded and standalone workflow to BPM suites, case management, and now, digital business platforms with business rules, low-

code, and robotic process automation. Figure 3 shows the functionality and type of processes these different tools support. Keep in mind that organizations use the full spectrum of these

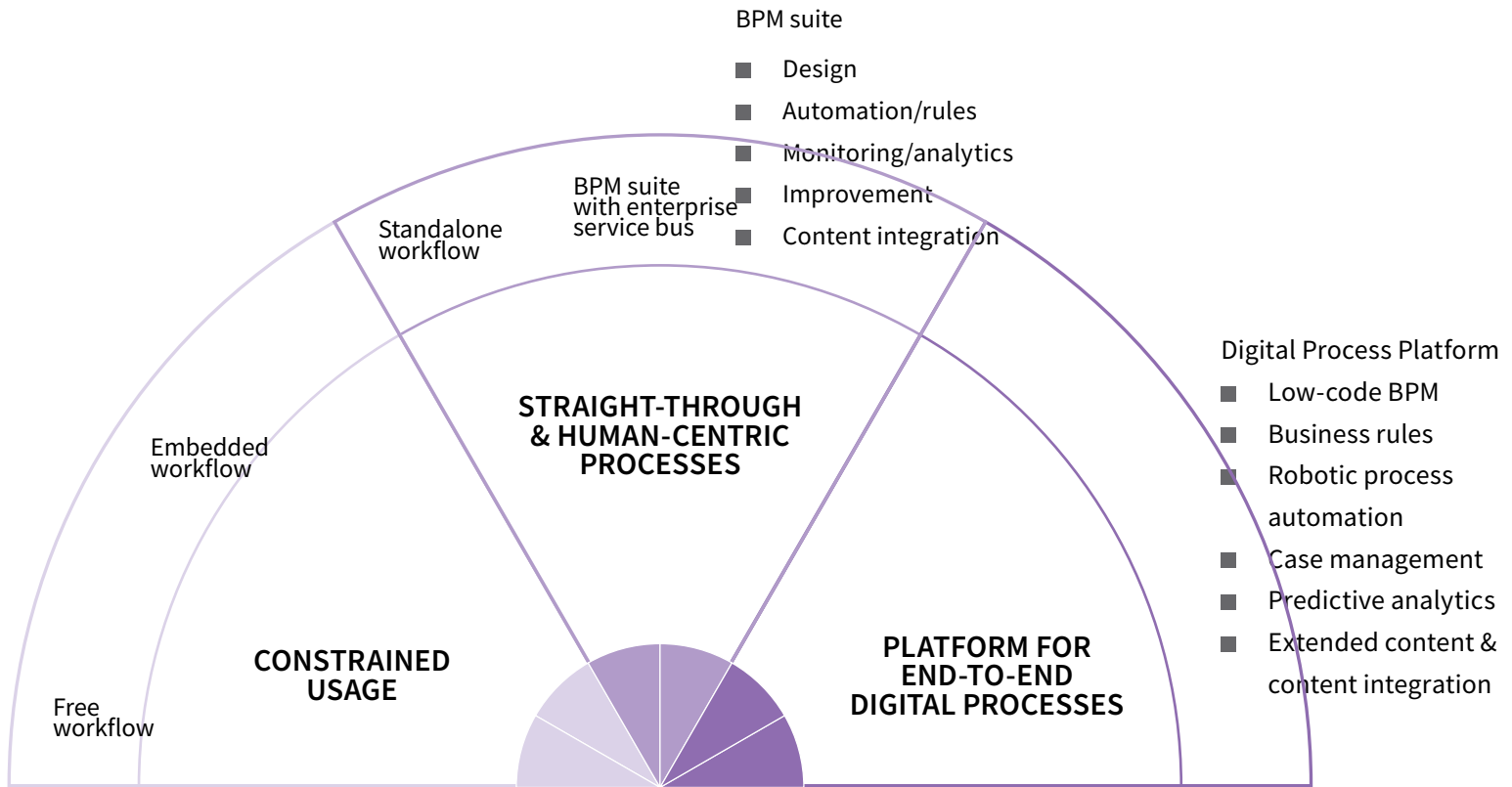
solutions: Figure 3 is not a timeline showing the extinction of categories as new ones emerged; rather, it shows the range of process automation tools in use.

Figure 3  
**Digital Process Platform's Suitability for Business Transformation**











## Getting Started: A Practical Guide to Digital Transformation

Although this brief emphasizes the importance of taking a digital outside/digital inside approach for process transformation, starting with the customer journey and then automating the end-to-end process, this is a tall order for most organizations. There are many obstacles, including these:

- Many organizations have not yet developed a digital business transformation strategy or new business model.
- Because their business is organized into silos, many organizations have not considered end-to-end processes.
- The leadership team hasn't identified who, or which team of leaders, will champion digital business transformation (and the organizational change management that goes with it).
- Business process practitioners focus almost exclusively on operational excellence, while digital experience practitioners focus almost exclusively on journey mapping and voice-of-the-customer.


Still, organizations can get started on process automation while senior executives work through strategic transformation. One or more of these approaches can help:

- Work with departments that have a constrained scope but still need process automation to better support the business, reduce costs, and increase sales.
- Reach across the organization to identify digital experience teams doing customer journey mapping, and see if they would welcome a business process perspective.
- Tackle processes that would benefit from robotic process automation linked with BPM.
- Focus on initiatives that provide DevOps with an opportunity to develop low-code skills.
- Champion digital process platforms with the digital experience leaders who are driving business transformation in the organization.

These pragmatic ways to start delivering business value through digital process platforms also position the organization for end-to-end business transformation initiatives when the time is right to move forward with new business models and digital transformation.

## Endnotes

- 1 See “Robotic Process Automation: A Breakthrough In Getting Work Done Quickly, Cheaply, and Accurately,” <http://www.digitalclaritygroup.com/robotic-process-automation/>, “Robotic Process Automation (RPA): robots that automate routine and complex work,” <http://www.digitalclaritygroup.com/robotic-process-automation-rpa-robots-automate-routine-complex-work/>, “Don’t miss out on robotic process automation,” <http://www.digitalclaritygroup.com/robotic-process-automation-hot/>, and “The big deal with robotic process automation,” <http://www.digitalclaritygroup.com/big-deal-robotic-process-automation/>
- 2 See “Top 10 Trends in BPM for 2018 and beyond,” <http://www.digitalclaritygroup.com/top-10-trends-bpm-2018-beyond/>
- 3 See “Headless CMS Breathes New Life Into ‘Content Anywhere,’” <http://www.digitalclaritygroup.com/headless-cms-content-anywhere/>, and “Eliminate Digital Asset Chaos with a Rich Media Ecosystem,” <http://www.digitalclaritygroup.com/dam-eliminate-digital-asset-chaos/>
- 4 These are typical results as seen by researching hundreds of case studies over several years.
- 5 See “Will you be a GDPR hero — or a GDPR victim?” <http://www.digitalclaritygroup.com/gdpr-systems-partners-hero/>, and “How to Survive and Thrive Under the GDPR: An Essential Guide for Marketers,” <http://www.digitalclaritygroup.com/survive-thrive-gdpr-guide-marketers/>
- 6 See “2017: Seven trends in adaptive case management (BPM) software,” <http://www.digitalclaritygroup.com/2017-seven-trends-adaptive-case-management-software/>, and “BPM: making the case for case management software,” <http://www.digitalclaritygroup.com/bpm-making-case-case-management-software/>
- 7 See “Transform Customer Experience and Operational Excellence By Going Digital Outside and Inside,” <http://www.digitalclaritygroup.com/transform-customer-experience-and-operational-excellence-by-going-digital-outside-and-inside/>, “‘Not-so-great’ customer experience (or, when the back office lets you down),” <http://www.digitalclaritygroup.com/not-great-customer-experience-back-office-lets/>, and “Looking for Customer Feedback in All the Right Places,” <http://www.digitalclaritygroup.com/customer-feedback-looking-right-places/>
- 8 See “Extending ECM to Office 365 fills in missing pieces,” <http://www.digitalclaritygroup.com/extending-ecm-office-365-fills-missing-pieces/>, “Transform Insights, Improve Operational Excellence, and Delight Customers with Extended ECM,” <http://www.digitalclaritygroup.com/delight-customers-extended-ecm/>, and “Extended ECM (xECM) opens the door to content for CRM users,” <http://www.digitalclaritygroup.com/extended-ecm-xecm-opens-door-to-content-for-crm-users/>
- 9 See “BPM: making the case for case management software,” <http://www.digitalclaritygroup.com/bpm-making-case-case-management-software/>, and “2017: Seven trends in adaptive case management (BPM) software,” <http://www.digitalclaritygroup.com/2017-seven-trends-adaptive-case-management-software/>
- 10 See “The CEM Imperative: Customer Experience in the Age of the Empowered Consumer,” <http://www.digitalclaritygroup.com/the-цем-imperative-customer-experience-in-the-age-of-the-empowered-consumer/>
- 11 For insights on trends in customer experience management and business process management see “The five top trends in customer experience management in 2018 and beyond,” <http://www.digitalclaritygroup.com/five-top-trends-customer-experience-management-2018-beyond/> and “Top 10 Trends in BPM for 2018 and beyond,” <http://www.digitalclaritygroup.com/top-10-trends-bpm-2018-beyond/>

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- 12 See “Transform Customer Experience and Operational Excellence By Going Digital Outside and Inside,” <http://www.digitalclaritygroup.com/transform-customer-experience-and-operational-excellence-by-going-digital-outside-and-inside/>
- 13 See “Customer Experience and Operational Excellence join forces for digital transformation,” <http://www.digitalclaritygroup.com/customer-experience-operational-excellence-join-forces-digital-transformation/>, and “Organizational Change Management: An (Emerging) Core Competency for Customer Experience Management,” <http://www.digitalclaritygroup.com/change-management-competency/>
- 14 See “Customer Journey Maps: A path to innovation and increased profits,” <http://www.digitalclaritygroup.com/customer-journey-maps-path-innovation-increased-profits/> and “Avoid the Journey Map Trap,” <http://www.digitalclaritygroup.com/avoid-journey-map-trap-strategy/>
- 15 See “Pharma Marketing: Get Started on Creating Great Customer Experiences with Journey Strategies,” <http://www.digitalclaritygroup.com/pharma-customer-journey/> and “Retail Marketing: Get Started on Creating Great Customer Experiences with Journey Strategies,” <http://www.digitalclaritygroup.com/retail-marketing-customer-experiences-journey-strategies/>
- 16 See “7 Tools to Uncover Customer Needs & Map the Customer Journey to Create Better Experiences,” <http://www.toprankblog.com/2016/04/7-tools-customer-journey/> and “Top 20 Customer Journey Mapping Tools: An Overview,” <https://mopinion.com/top-20-customer-journey-mapping-tools-overview/>
- 17 Alternative terms for BPM also include digital automation platforms, digital business transformation platforms, digital business platforms. Digital Clarity Group uses the term digital process platform because it best describes the functionality provided; also, “automation” is too limited while digital “business” and “transformation” are too broad. In our view, process is at the heart of the technology.
- 18 See “Use Entity Modeling for Simplified Application Development During Business Process Automation,” <http://www.digitalclaritygroup.com/entity-modeling-simplified-business-process-automation/>
- 19 For more on RPA, see “Robotic Process Automation: A Breakthrough In Getting Work Done Quickly, Cheaply, and Accurately,” <http://www.digitalclaritygroup.com/robotic-process-automation/>, “Robotic Process Automation (RPA): robots that automate routine and complex work,” <http://www.digitalclaritygroup.com/robotic-process-automation-rpa-robots-automate-routine-complex-work/>, “Don’t miss out on robotic process automation,” <http://www.digitalclaritygroup.com/robotic-process-automation-hot/>, and “The big deal with robotic process automation,” <http://www.digitalclaritygroup.com/big-deal-robotic-process-automation/>

# About Digital Clarity Group



Digital Clarity Group (DCG) is a research and advisory firm that helps organizations deliver world-class customer experience through partnerships with best-fit technology vendors and digital partners. DCG enables client success by bringing unprecedented transparency to selecting, engaging, and optimizing those relationships. Its guidance draws on its proprietary data about agency and integrator partner performance, its deep experience with vendor and digital partner selections, and the market expertise of its industry analysts who cover technologies for managing customer experiences. DCG delivers on its mission through its [VOCalis](#) customer satisfaction assessment program, its vendor and digital partner selection services, and [Partner Finder](#), a free resource that buyers use to identify qualified digital partners based on key criteria.

Digital Clarity Group serves clients across the ecosystem for customer experience solutions. DCG helps enterprise buyers of services and technologies engage with the optimal set of partners for their digital transformation and customer experience initiatives. DCG helps digital agencies and integrators align their client portfolios with their strongest capabilities and competencies, leading to higher levels of customer satisfaction, repeat business, and performance-based differentiation. DCG helps technology vendors optimize their channel partner programs for successful implementations that deliver sustainable value to customers.

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