



IT'S A BRING-YOUR-OWN-APP, MOBILE WORLD

MODERNIZE YOUR BUSINESS PROCESSES TO WORK SMARTER

Companies today are under more pressure than ever to expose inefficiency and eliminate it through automation. To do this, IT and business leaders typically target manual workflows and paper-based forms because they are cumbersome, time-consuming and can't easily accommodate a mobile workforce.

BUSINESS PROCESS APPLICATIONS CAN BREATHE NEW LIFE INTO TIRED, MANUAL WORKFLOWS.

They can streamline processes and connect disparate line-of-business (LOB) systems so that users can work smarter and perform tasks faster. When business applications are supported on mobile devices, field workers can work more efficiently wherever they go. However, it can be challenging for resource-constrained IT departments to quickly design and update apps that work with multiple platforms, such as tablets, smartphones, and email.

IT departments and users alike would benefit from business process automation that simplifies the design and rollout of apps for the mobile workforce. This white paper uses real-world scenarios to discuss how the right business application platform can help you modernize processes for your mobile workforce and support your always-changing business needs.

Demand meets modernization

WHAT IF A WIND-POWER TECHNICIAN NEEDS ACCESS TO DOCUMENTS WHILE IN THE FIELD BUT CANNOT ACCESS THE COMPANY REPOSITORY ON HER SMARTPHONE?

The solution is simple: she can upload the documents to a cloud-based storage service and access them on her phone's 4G network wherever she goes. You have probably already felt the impact of similar scenarios in your organization:

80% of all consumers have downloaded a mobile application – most of which are free.¹

90% of employees use consumer-oriented, cloud-based services, like Skype and LinkedIn, for their work.²

79% use cloud-based file sharing and collaboration tools, such as Dropbox or Microsoft OneDrive.²

40% of employees use their own smartphones for work.²

This consumerization of IT is hard evidence of what users already know: current business processes are not fully meeting users' needs. If they were, users would not feel compelled to cobble their own solutions from outside sources.

More and more businesses are embracing the move to a mobile, digital work style. They need to support workers who are on the go, working online and off. Indeed, eight out of ten manufacturing businesses surveyed expect mobile apps to increase their productivity by at least six percent.³ Despite the optimism, many IT leaders feel that productivity gains and other benefits of mobility remain out of reach because outdated manual processes hinder organizations' progress toward modernization.



¹ Whittaker, Zack. *Bring-your-own-device gains traction in the U.S. — even if enterprises aren't ready yet*. ZDNet. October 2014. (<http://www.zdnet.com/article/bring-your-own-device-gains-traction-in-the-u-s-even-if-enterprises-arent-ready-yet/>)

² IDG. *IDG Enterprise Consumerization of IT in the Enterprise Study 2014* 2014 survey by IDG. March 2014. (<http://www.idgenterprise.com/report/idg-enterprise-consumerization-of-it-in-the-enterprise-study-2014>)

³ Szal, Andrew. *Survey: Majority of manufacturers plan to bolster mobile app use*. Manufacturing Business Technology. February 2015. (<http://www.mbtmag.com/news/2015/02/survey-majority-manufacturers-plan-bolster-mobile-app-use>)

Many IT directors understand the complexity involved in connecting information from critical, siloed LOB systems to mobile workers on a variety of devices with different form factors. According to **78 percent** of business managers and executives in a recent survey, achieving digital transformation will become critical to their organizations within the next two years. However, **63 percent** said the pace of technology change in their organization is too slow.⁴ To automate a workflow with a custom business app, IT typically needs to devote extensive time and costly development resources to planning, coding, testing and rollout.

COMPANIES EMBRACING MOBILITY

Mobile devices may have started as a bring-your-own-device (BYOD) problem for companies, but they have now found a permanent home as a productivity boost. Cloud-based storage and apps expand the limits of what users can do with a handheld device. “Employees report saving an average of 57 minutes a day using mobile devices – that’s nearly an hour of productivity gained each day by simply providing a different way to work. Think of the productivity benefits you could gain by scaling this flexibility across your entire organization, ultimately reducing the cost of doing business.”

Intel IT Center

<http://blog.azoft.com/mobile-business-process-automation-with-workflow-examples/>



⁴ Fitzgerald, Michael, et al. *Embracing Digital Technology: A New Strategic Imperative*. MIT Sloan Management Review. October 2013. (<http://sloanreview.mit.edu/projects/embracing-digital-technology/>)

TRANSFORMING THE TRADITIONAL

How can you quickly and affordably make your business mobile?

BEFORE ANSWERING THAT QUESTION, LET'S CONSIDER WHAT A TRANSFORMED, FULLY MODERNIZED BUSINESS PROCESS MIGHT LOOK LIKE.

Imagine Jorge, a district manager for an oil and gas company. He is based primarily in a regional office but frequently travels to train employees, ensure compliance, and inspect operations. The weekly report from well #TX592 is a growing cause for concern because its unplanned downtime is trending upward. Hydrogen sulfide and CO2 emissions also regularly spike above acceptable levels, which could create legal problems. Jorge decides to visit the well with its foreman to see what is going on. The following table compares his traditional well inspection and remediation process with a modern, mobile-ready business app.

A MODERN BUSINESS APPLICATION:

- + Provides digital forms and automated workflows that allow Jorge to complete his well inspection and remediation process in a fraction of the time it would take by using the traditional process.
- + Helps eliminate paperwork and roadblocks.
- + Empowers users to do their work smarter and faster by providing all the information they need, in context, on any device.

TRADITIONAL PROCESS

- + Jorge downloads and prints the paper forms he will need to fill out while in the field.
- + Onsite, he takes notes by using a form and clipboard and captures information he knows will be required in other forms.
- + He takes photos with a company-issued digital camera to document needed repairs.
- + He phones the office to start the purchase process for replacement parts.
- + He returns to the office to complete his paperwork and to enter findings and photos into various systems.
- + He logs the compliance violations he noticed and emails management about them.

MODERNIZED PROCESS

- + Jorge opens an "Inspection" app on his tablet and checks a box to indicate he needs to work offline. The app accesses various systems and prepopulates relevant data into the forms he will need, storing them for offline use.
- + On-site, he fills out forms and logs compliance violations on his tablet.
- + The app asks if he wants to order replacement parts. Jorge taps yes.
- + Jorge hurries home to make it to his daughter's violin recital. While waiting, he uses the 4G network on his phone to synchronize the inspection app with his office systems.
- + The app alerts management about the compliance violations and starts an automated workflow to purchase needed replacement parts.

FIXING A SLOW SALES PROCESS

Automating workflow to increase efficiency

Now let's take a look at how apps can solve a real-world business problem. Rakesh is a regional sales rep for an office equipment and supply company who relies heavily on his smartphone. He's great at his job but finds the entire sales process – from onboarding new customers to processing an order – slow and frustrating. Currently, each new opportunity requires him to:

- + Collect new customer business cards or information on paper since he is traveling without access to his customer relationship management (CRM) system.
- + Wait for data-entry clerks to enter new customer data into the CRM system, Salesforce Sales Cloud.
- + Log in to Microsoft SharePoint or a cloud-based storage service, like Box, on a laptop, to locate, download, and print or email product marketing materials to the prospect.
- + Determine product availability from a back-end SAP database.
- + Generate a quote from Salesforce.
- + Obtain manager approval of the quote.
- + Obtain a customer signature for a purchase order.
- + Scan the signed purchase order and associate the digital version with the customer's Salesforce record.
- + Confirm and generate the order for shipment from various suppliers around the globe.

Rakesh asks his IT manager, Darren, if there's a way to automate part or all of this workflow so that he can use his smartphone to enter data and kick off the process. Unfortunately, the development effort to automate would require months of coding and testing, using specialized knowledge of each LOB system. The IT department also doesn't have extensive in-house knowledge on how to develop a mobile app that can display forms properly on devices with different form factors. Darren would need to engage specialized contractors, but the cost is just too prohibitive.

Undaunted, Darren looks for another approach to tackling the problem. He realizes he doesn't have to invest in a major coding effort if he can automate workflows and forms from a business process automation platform. With K2, Darren can solve business problems like Rakesh's by creating mobile-ready forms and automated workflows – with minimal coding required. K2's proprietary SmartObject framework makes it easy for users to interact with multiple siloed business systems in a single interface, while data remains secure in its system of record. Reusable app components make it easier to quickly modify apps as platforms and business needs change, without needing an extensive development and test effort.

Darren's team rolls out the new sales app in weeks instead of months. Because K2 uses a responsive design, IT can build an app once and it will automatically conform to any device, including tablets and smartphones.



The new app allows Rakesh and his teammates to access data from multiple LOB systems, such as Salesforce and an SAP product database, on a single form. He can even access forms when he's offline in a remote area or while traveling. The data he enters will automatically sync with the company's systems of record as soon as his device reconnects. Rakesh can also enter customer data once and kick off an automated workflow to check inventory, generate a quote, get approval, and create a purchase order.

The entire process goes so smoothly for Darren that he decides to extend the automated workflow to enable reps to capture sales lead details in forms that automatically enter the information into the company's CRM system. The workflow also allows reps to pull up Salesforce notes from previous sales calls and access marketing or contract documents stored in Dropbox, Box or another cloud-based storage service.

If Darren had relied on internal or contract development teams to develop apps from scratch, the time, effort and resulting costs would have significantly reduced or eliminated any possible return on investment. In addition, every time needs of the business changed or a business group needed a modified app or workflow, Darren would have had to initiate another time-consuming development effort.

BUILD AN APP ONCE, AND RUN ON ANY DEVICE



Aegon, a global provider of financial solutions for life insurance, pensions and asset management, used K2 to reduce invoice approval time by 50 percent.

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By designing apps with the K2 platform, Darren was able to roll out business apps quickly with little or no code. He – or any savvy IT pro or business analyst – could make quick changes to apps without a major redesign and then see those changes take effect immediately. Darren took advantage of reusable components to quickly create new apps without redesigning from scratch, while the responsive design let him create forms once for all devices, including tablets and smartphones.



REUSE COMPONENTS AS BUILDING
BLOCKS FOR NEW APPS.



Empowering mobile users

Darren gave Rakesh and the sales team a major productivity boost by providing full-featured mobile apps they could use in any location. There are numerous workflows that can be designed or enhanced by using the mobile-centric design capabilities in K2. For example:

- + **Customer service employees** performing equipment maintenance or repair can access manuals from cloud-based storage, input customer information in forms, and even order parts through a back-end database, all from a tablet or smartphone.
- + **Field service technicians** for utilities, city road-maintenance crews or cable companies can create workflows to dispatch service reps to jobs, based on the workers' current locations. Field workers can use mobile devices to submit maintenance requests or fill out forms indicating completed work, even when connectivity is unavailable.
- + **Home health care workers**, such as visiting nurses, occupational or physical therapists, or hospice workers, can use mobile devices to securely access patient information from clinic or hospital systems. The health care providers can also submit patient vitals and other data, and even get digital signatures for approval of procedures, by using built-in DocuSign integration.

Create business applications for any process

The previous scenarios demonstrate just a few of the ways in which you can automate processes more easily and affordably with K2. Other examples of common workflows include:

- + **Account management:** Get a complete view of customer information and bring the right people, approach and solutions together to better meet customer needs.
- + **Customer service:** Increase service levels to customers by driving efficient communication and issue resolution.
- + **Product introduction:** Take new financial products to market faster with collaboration, tracking, compliance and automation.
- + **Billing:** Reduce errors, expedite revenue generation, and more efficiently manage billing through workflows that surface the right data to the right people in the billing process.
- + **eDiscovery:** Streamline eDiscovery across systems through centralized records management, classification, retention and destruction, based upon policies.
- + **Inventory management:** Track, report and automate inventory management to ensure the supply chain continues to run efficiently.

The Polish subsidiary of the global health care company Sanofi used K2 software to develop more than 100 automated business applications and transform their core business processes to become more efficient and auditable.

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TECHNOLOGY AT THE SPEED OF YOUR BUSINESS

By working smarter and building faster through automation, companies are transforming themselves into highly competitive, efficient models of success. K2 gives you the flexibility you need to quickly roll out workflows and forms to automate outdated processes for users anywhere, on any device – even when offline. K2 workflows integrate information from once-siloed LOB systems, so the right information gets to the right person. Because K2

provides low- to no-code design tools and reusable components, companies can empower users to quickly create the business apps that meet their needs, without massive expenditures on dedicated IT resources and large-scope projects.



For more information or to request a demo of K2, visit the K2 website.

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