



eBook

# The CIO's guide to scaling process automation excellence

nintex



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# The CIO's guide to scaling process automation excellence

As your company scales, processes become more complex: More employees, more systems, more data sources, and more vendors.

Plus, as a CIO, you're under constant pressure to consolidate processes and tools to mitigate SaaS sprawl, keep costs down, and leverage new technologies like AI to fuel business growth.

It's a tall order—and it can be difficult to know where to start to truly have an impact on your company's growth. So, how do you do it all without leaning too heavily on your excellent but exceedingly busy IT team?

**The key is empowering your technical business users to be efficient and self-sufficient with user-friendly process automation software and apps that connect your systems, surface data, and progress tasks.**

The result? Complex, multi-system, cross-departmental processes once thought unmanageable or requiring custom code become streamlined, efficient, and repeatable across the organization.

Automation software and custom apps are no longer reserved for individual workflows, but are making entire departments—and entire companies—more efficient, compliant, and profitable.

As you work to scale process automation across your org, there are three areas of focus that will help you excel as a future-looking CIO:



Leveraging AI to discover, document, and automate your business workflows without reliance on IT



Building custom apps that bring together your systems and data into single pages and portals



Driving internal efficiencies, ensuring compliance, and creating compelling customer experiences

A combination of workflow automation and powerful apps—scaled across the organization—will help you drive internal efficiencies, ensure compliance, and create compelling customer experiences.

**This guide explores three primary strategies the modern CIO can implement to create and manage tangible, scalable process automation excellence.**



# Create a symbiotic relationship between IT and operations



Making a significant impact on your organization from a process automation lens requires thinking outside of what's currently in place—and beyond automating individual workflows.

Often, this means approaching process automation from a holistic perspective, improving collaboration company-wide, and considering software that will help you build and maintain excellence.

Not there yet? Start breaking down the silo walls between functions by tackling practical tasks like process mapping and integrating your platforms.

# 1. Begin with cross-functional process mapping

Improving upon and scaling your current processes requires a detailed understanding of what those processes actually are and how they interact with one another. In other words, you need process mapping—a systematic way to visualize and document your business processes.

Process mapping takes time, but it's worth it. As part of this approach, you create visual representations of each step in your workflows from start to finish. This naturally improves collaboration and communication as your team can see how their work dovetails.

Process mapping also has a number of other benefits, like:

- Finding bottlenecks and issues that disrupt a workflow
- Improving employees' process and role understanding
- Facilitating training of future hires
- Ensuring compliance with regulatory standards

While you could map processes manually, interviewing each employee involved in the process and documenting their inputs visually, using business process mapping software like Nintex Process Manager makes the task much simpler and provides instant access for all teams.

Unlike Microsoft, which has a less-than-intuitive user interface for process mapping, Nintex Process Manager has features and functionalities that allow you to create easy-to-read, company-focused workflows. That means you gain a single source of truth with clear maps that anyone in your organization can read and use.

## PRO TIP

Use artificial intelligence features to save hours capturing and documenting processes. Nintex's new AI-Powered Process Capture uses bots and AI to turn your day-to-day actions into scalable, optimizable process documents.

## 2. Identify opportunities for process automation

Once you've selected a tool and mapped your existing processes, it's time to look for optimization opportunities. Start by identifying your company's most important processes—the ones with the greatest impact across departments.

When choosing a process to optimize, narrow your list down to those that align closely with overarching business goals. Then, look for ones with:



Evident gaps that  
create delays



Extra steps that cause  
overcomplication  
or confusion



Repetitive or mundane  
tasks that take humans  
forever to do



Many errors or  
security incidents

If you automate processes with these issues, you'll see an outsized impact on your productivity. And because you selected a process that aligns with your organizational objectives, you'll likely gain early buy-in from other executives and stakeholders.

### PRO TIP

**Go right to the source. If you need help deciding how to get started with process optimization, talk to employees who work closely with those processes. They know which ones take a disproportionate amount of their time and energy or throw up the most red flags during audits.**



### 3. Lean into integrations

As your organization grows, one question becomes increasingly important: How do you continue to scale while minimizing spend, complexity, and total IT dependence?

The key is finding ways to extend the value of your core systems to unite your organization with integrated process management and automation. Instead of configuring multiple systems to handle portions of a broad business process, you need a way to connect your people, systems, and data with a single orchestration layer that progresses all workflow steps from start to finish.

For example, say your company uses Microsoft products like Dynamics ERP to improve your finance and supply-chain systems and Microsoft 365 for productivity tools like Excel, OneDrive, and SharePoint.

As a Nintex customer, you can effortlessly extend these capabilities with core integrations and connectors to power efficiency, harness complexity, and move work forward across teams. That's because Nintex seamlessly connects to your Microsoft applications and other systems you trust (like Salesforce, Greenhouse, UKG, and Oracle NetSuite).

Nintex for Microsoft lets you leverage your Microsoft investment by:

- Automating complex processes fast (no code required)
- Documenting, automating, and scaling business processes
- Managing processes that run for longer than 30 days
- Streamlining process interactions that call for anonymous forms or branded apps
- Allowing you to work within and outside your business while maintaining central data governance and security


“With Nintex, we provide a mechanism that allows integrations to be built easily with existing infrastructure or any other systems and tools that you use. We have extensions and plugins, which make the job easier,” says Saravana Karthikeyan, Senior Solution Engineer at Nintex.

As a result, you not only eliminate data silos and create a more balanced relationship between operations and IT—you also achieve enhanced visibility and control, improved productivity and efficiency, and more cost savings and resource optimization.





# Democratize process automation (and start small with your team)

A photograph of three people—two men and one woman—collaborating around a laptop. The man in the center, wearing a green shirt, is pointing at the screen. The man on the left, wearing a dark jacket, is looking at the screen. The woman on the right, wearing a pink sweater, is smiling and looking at the screen. The background is blurred, showing an office environment.

Achieving process automation excellence at scale requires going beyond your IT department to put your processes in the hands of the people who use them day-in and day-out—while still maintaining centralized control and governance.

Let's take a look at three ways to get started:

# 1. Introduce self-serve automation and application development

**Your IT teams already need more hours in the day—putting more work on their desks as you scale is a no-go. And your business users needed a solution for automating cross-department workflows and information yesterday.**

The solution? Using forms automation, workflow automation, and application development to extend the value of your core systems (including Microsoft) to unite your organization.

Unlike traditional app dev, which requires a dedicated technical team and substantial resources, Nintex helps you improve efficiency and empowers business analysts and technical business users with process intelligence, automation, and self-serve application development.

Technically savvy business users and business analysts can intuitively build and use these workflows and apps. To add an automated action, for example, they can just drag it into a workflow or step, and then configure it to their liking. No coding required.

The end result is a win-win: You empower employees with a scalable low-code/no-code solution to automate common processes themselves—no matter how simple or complex—and require less heavy lifting from IT.





## 2. Test automation projects in prioritized areas

**Democratizing process automation is a marathon, not a sprint. In other words, you need to start small to get buy-in and ensure success.**

One way to do that is through running pilot projects. Instead of making sweeping changes across the board, help teams adopt one small, specific use case first.

For example, if onboarding is a priority, you might automate just your “paperwork” process between the day an employee signs their contract and the day they start. With Nintex, you can automate the generation, approvals, forwarding, and signing of these documents to save time and reduce risk of human error.

When your human resources team sees their reduced workload and improved consistency, you get proof of concept—a small win that triggers more excitement and ideas for process automation workflows. Then, you can expand to other high-priority projects for that team.

This method creates a snowball effect, allowing you to build momentum and buy-in over time. This is scaling process automation in action.



### 3. Leverage automation and AI

**When democratizing process automation at your organization, the goal is to make things easier for your employees—not add more to their to-do lists.**

With AI, you can reprioritize repetitive or manual tasks to bots and free up valuable employee time and brain power. AI can support your employees in ways that allow more time to focus on what matters most.

Robotic process automation (RPA) speeds up your workflow with a virtual team of bots that works around the clock, tackling monotonous or repetitive tasks for your human employees.

This really comes in handy for companies in industries like finance, where some platforms have stricter integration rules or lack native application programming interfaces (APIs). Without integrations, employees have to log into multiple systems, copying and pasting data from one to the other. The result is a lot of clicks—and hours that could be spent on more strategic tasks.

“You can actually automate these tasks using RPA,” explains Karthikeyan. “You build a bot and train it, and the bot will pick up the data from a data source and feed it much faster than a human can. If it takes a couple minutes for you to go through an application submission or screening, it takes a few seconds for the bot.”

Building a bot is much less challenging than it sounds. [Nintex RPA](#) features a drag-and-drop design interface that makes it easy for technical business users and business analysts to build bot-based automation without any coding knowledge. Then, the platform uses machine vision and optical character recognition (OCR) so robots see and use applications just like humans would.







# Establish a culture of ownership

Democratizing process automation is a big piece of the puzzle. But to achieve true process automation excellence as you scale, you need more than that. You need to build a culture of ownership.

In a culture of ownership, everyone feels a shared sense of responsibility for maintaining and optimizing the organization's processes. Employees feel empowered to voice questions or suggestions and to make changes to workflows.

Here are five steps you can take to begin establishing a culture of ownership at your company:

# 1. Create a process center of excellence

A process center of excellence is the engine that will drive the cultural change at your organization. A small team of four or five employees—or even, at smaller organizations, a designated point person—can help ensure process automation and improvements become a reality.

“All that’s needed is someone with a genuine interest in process automation, perhaps with some experience in cross-departmental processes. This role doesn’t have to be full-time, but it should be closely aligned with IT, which governs the overall process automation framework,” says Karthikeyan.

Your center of excellence has two goals:

1. **Establish a framework** that explains what process management at your organization entails, how it will work, and who will need to get involved.
2. **Bring everyone on board with process improvement**, integrating it into all employees’ daily responsibilities to create a culture of growth.

If you’re not sure where to start with scaling process automation excellence, forming a center of excellence is your first step. Read more about how to choose your team members and help them get started in our ebook, [\*Guide to Developing a Center for Process Excellence\*](#).

“Creating a center of excellence—or assigning someone passionate about process automation and connected to IT—can drive significant innovation across departments and help scale automation effectively,” says Karthikeyan.



## 2. Choose the right process automation tool

Just as important as your process automation leadership and framework is the process automation tool you choose. The wrong tool—for example, one that's cumbersome to use, doesn't handle more complex use cases, or doesn't play well with your current tech stack—will make company-wide adoption an uphill battle.

On the flip side, the right tool will let you capture your current processes—both simple and complex—accurately and efficiently, integrate with your core resources, and streamline and iterate processes.

While it may be tempting to just go with one of your existing platform's built-in process automation tools to save money, that's not always the best option. For example, many organizations turn to Microsoft Power Platform if it's part of their productivity suite. But they quickly find that they can only run short, internal processes or that key connectors hide behind a paywall.

Instead, a platform like [Nintex Automation CE](#) helps you go beyond basic automation to document, manage, and automate complex, cross-functional processes that involve forms, apps, workflows, and documents.

With Nintex, you can:

- Empower technical business users to automate processes on their own, freeing up your limited or overburdened IT team
- Discover, visualize, and optimize even long-running, externally facing processes for better efficiency, governance, and compliance
- Access built-in integrations and connectors for seamless workflow integrations
- Rely on transparent pricing—all cloud costs are included—so you can plan your budget
- Get personalized support that's tailored to your organizational goals and challenges

The right tool ensures your company sees sustainable change in the long-term, getting buy-in from stakeholders and a return on investment (ROI) from improved processes.

### 3. Maintain a process repository

Driving success at scale requires transparency and consistency for all stakeholders. That means you need to keep processes at your employees' fingertips—where they can review, discuss, and adjust them with their teams.

A digital process repository, or centralized location to store your process maps, forms, and workflows, helps improve collaboration, consistency, and transparency. When a team member needs to review a workflow, they can access it with just a couple clicks of a mouse.

This ease of access becomes crucial as your company grows. For example, just a few years ago, [Coke Florida](#) was storing nearly 600 processes in a legacy process repository with PDFs, videos, pictures, and spreadsheets. The sheer volume of documents made it difficult and expensive to maintain and tricky for users to navigate.

Using [Nintex Forms](#) and [Nintex Process Manager](#), the company created a much more accessible repository that allows for more visibility and control over key processes, encourages collaboration, and increases accountability.



## 4. Foster a sense of shared responsibility

For long-term process automation success, it's essential to promote shared responsibility among teams. If your employees typically go directly to IT for process automation needs, this might require a mindset shift.

Part of promoting a sense of responsibility and autonomy is defining the path to process automation, including identifying process owners. Karthikeyan suggests you might collaborate within your no-code platform like this:

- An operations team member maps a process
- Looking at employee feedback, they home in on an automation opportunity
- They ask for approval from IT to build it
- After getting the okay, the ops employee builds the process with a no-code platform like Nintex
- They show the process to IT for some integration needs
- IT publishes it, with approval from governance and business teams

Each person involved in the process has clearly designated roles and responsibilities, which provides clear parameters for their collaboration.

And while this might look like a lot of back and forth, with Nintex, it's smooth and effortless because you have a single source of truth and functionalities like real-time reporting and collaboration tools.

Then, you just need to continue to review process performance metrics and identify ways to keep the cycle of improvement going.

# Measuring the impact of process automation excellence

Few things are more motivating than seeing concrete, tangible results. With Nintex Process Manager, you can track time frames for process completion so your team members can see exactly how much time they're saving.

Behind the scenes within the platform, you can also enter the hourly wage for each role involved and the time a process typically takes, including labor and wait times. The system will calculate how much money you're spending when you run the process without automation—and how this figure compares to the actual results of the automated process.

Sharing these results in an internal newsletter or email creates a sense of excitement that encourages your team members to continue working together toward process automation excellence.





# Drive efficiency and scale through process automation and custom apps

Nintex puts your employees in the driver's seat with intuitive and self-service process intelligence, automation, and app dev. Plus, Nintex integrates other core platforms, like Microsoft or Salesforce, to make your resources go further and ensure you get the most out of your tech investments.

With a designated process automation and app development [platform](#), you can identify, map, automate, and optimize even the most lengthy and complex business processes without putting extra responsibilities on your IT team.

If you're ready to consolidate systems and automate your company's simple-to-complex business processes to help you scale the business intentionally and sustainably, [request a Nintex demo today](#).



Nintex, the possibility engine™, allows companies to unlock the power of intelligent automation. Today more than 8,000 public and private sector organizations across 90 countries turn to the Nintex platform to automate how work gets done, remove friction from business processes, and unlock the full potential of their people.

Learn more about how Nintex and its global partner network are propelling people, work, and business forward at [nintex.com](https://nintex.com).