

How to Deliver Intelligent Process Automation in the Modern Enterprise



Best Practices Approach for How to Modernize Legacy Systems in SharePoint & Office 365

About Gig Werks

Be it in the Cloud with Office 365 or on-premise, Gig Werks has delivered award winning business solutions for departments & industries, built on SharePoint & Office 365.

Awards & Recognition

- Microsoft Gold Partner since the firm's beginning in 2001
- Virtual Technology Specialists for the Microsoft New York Enterprise Group
- 5x Microsoft SharePoint Technical Excellence Partner Award Winner
- Approved Vendor of Microsoft Legal and Corporate Affairs Group (LCA)
- Invited into the Partner Evidence Program for SharePoint 2007, 2010, 2013 & 2016
- Nintex Partner Award Winner

Solution Expertise for Full Microsoft Stack

- Office 365, SharePoint, Cloud Applications, Business Intelligence

Solution Expertise for Full Nintex Stack

- Workflow, Forms, Hawkeye, Document Creation, Nintex Workflow Cloud

Business Solution Expertise Across Industries:

- Professional Services, Legal Firms & Departments, Facilities Management, Architecture/Engineering/Construction (AEC), Financial Services, Healthcare/Pharmaceutical



History of WSP's & Legacy Customizations

- **Traditional Approach to SharePoint Customizations**
 - Built as WSP's to provide specific functionality to support business functions/features
 - Typically deployed at the SharePoint Farm Level
- **Commonly built WSP's & customizations include:**
 - Connecting to SQL Server
 - Site Provisioning Automation
 - External sharing management (FBA, etc.)
 - InfoPath forms to front end processes
 - Low level customizations

Disadvantages of WSP's & Legacy Customizations

- **Technology Limitations**

- WSP's limit you to what versions of .NET used to build customizations and use of .NET in general
- Inability to use latest technology for development
- Complicates customizations in future releases of SharePoint and hybrid deployments
- Requires high level developers to maintain customizations

- **Difficult to Scale**

- **Significant overhead in cataloguing & documenting inventory of WSP's**

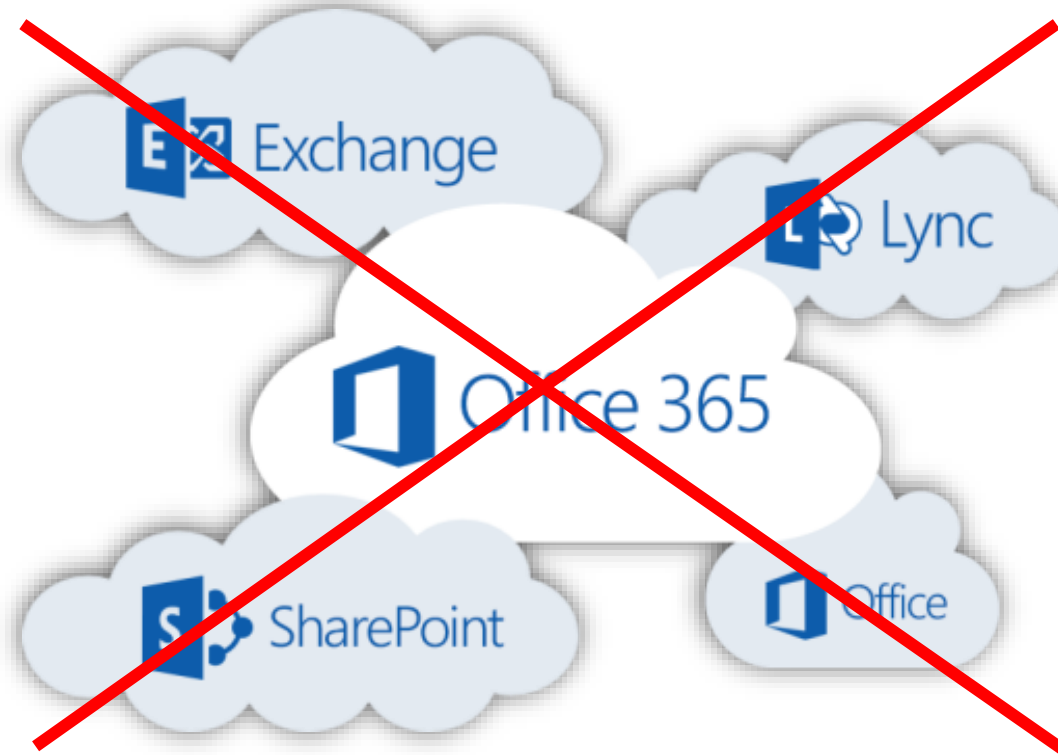
Disadvantages of WSP's & Legacy Customizations

- **Significant Risk**

- WSP's can affect how other WSP's work which can destabilize your farm
- With WSP's & .NET apps deployed directly to SharePoint, represent risk & expense during upgrades
- Increased risk of destabilizing entire SharePoint through due to intrusive, low level integration on the farm level
- Unintended negative effects on sites customizations were not targeted for
- Degradation of farm level performance
- Farm level customizations in WSP's that fail can cause SharePoint outages
- Difficult to remove from an environment

Disadvantages of WSP's & Legacy Customizations

**DOES NOT WORK IN THE CLOUD OR
HYBRID ENVIRONMENTS**



Solution Architecture: Then & Now

Then: Monolithic Solutions

- Requires server-side code
- Solutions are “one offs”
- Heavy reliance on IT support
- Service interruptions during upgrades
- Prolonged release of solution to business
- Delayed return of business value
- Dependency on specific versions of .NET

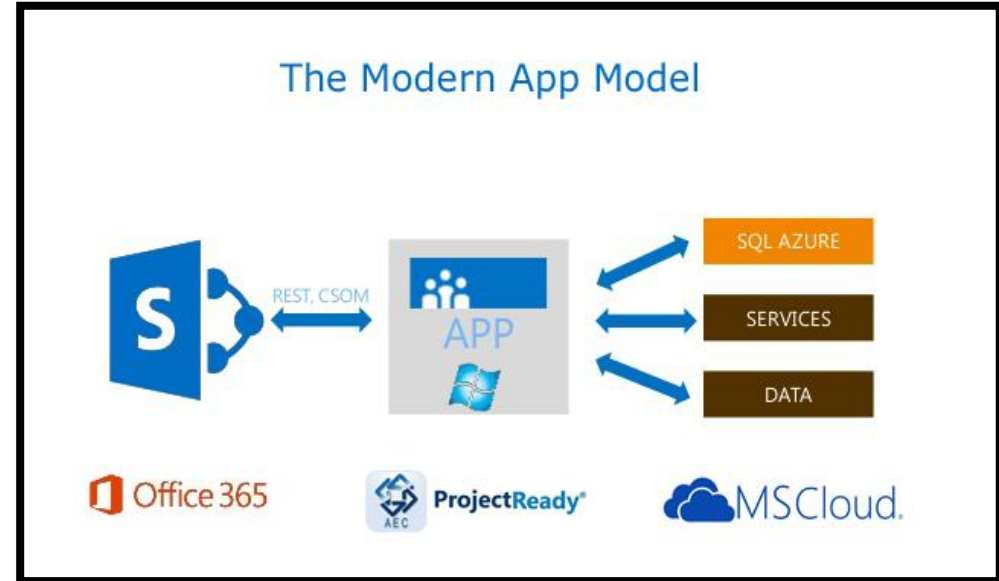
Now: App Solutions

- Nothing deployed to the farm directly
- Application value increases over time through reuse and extension of solution
- Focus is User Experience
- Minimal IT involvement
- No down time to deploy
- No limitations of versions of .Net or technology
- Rapid build and deployment

The Modern SharePoint Enterprise

Applications & Office 365

- New SharePoint App Model
- Built for the Cloud & Office 365 to connect your data across the enterprise
- Sitting outside of SharePoint, Applications “call” to SharePoint’s API via the modern app model
- Use platforms (**NINTEX**) to build apps quicker & easier to transform WSP’s & legacy systems
- Satisfies the “Retail Effect”
- Eliminate capital expenditures & move to line item
- Easily Scale into the future



Modernizing Processes with Nintex

Nintex Workflow Platform provides intuitive, integrated, intelligent process automation for line of business workers (*clicks not code*)



Nintex Workflow and Workflow Cloud

Flexible deployment; no coding required – *Drag. Drop. Done.*



Nintex Hawkeye

Workflow process analytics and intelligence



Nintex App Studio

Comprehensive mobile and forms development



Nintex Forms

Quick and easy forms designer



Nintex Xtensions


Seamless integration to cloud services, business applications, and content stores




Nintex Document Generation

Automated custom documents integrating diverse content

Nintex is the market leader in intelligent process automation for the enterprise

 #1 in Workflow & Content Automation (WCA) -Aragon Research

 Leader in Digital Business Platforms -Aragon Research

 #1 in strategy for Digital Process Automation Wave -Forrester Research



History

Founded in Australia, 2006

Over 7,500 enterprise customers in 90 countries

Industry Adoption

Millions of automated processes annually

Billions of workflow executions annually

Industry partners



8,000+ Nintex Global Customers

GIG WERKS & NINTEX MUTUAL CUSTOMERS



MANUFACTURING



GOVERNMENT



FINANCIAL SERVICES



RETAIL & CPG



SERVICES



HEALTHCARE



ENERGY



ENTERTAINMENT & MEDIA



The Total Economic Impact™ of the Nintex Workflow Platform

Cost Savings and Business Benefits

ROI: 176%

NPV: \$1,020,000

Payback: 10.5 months

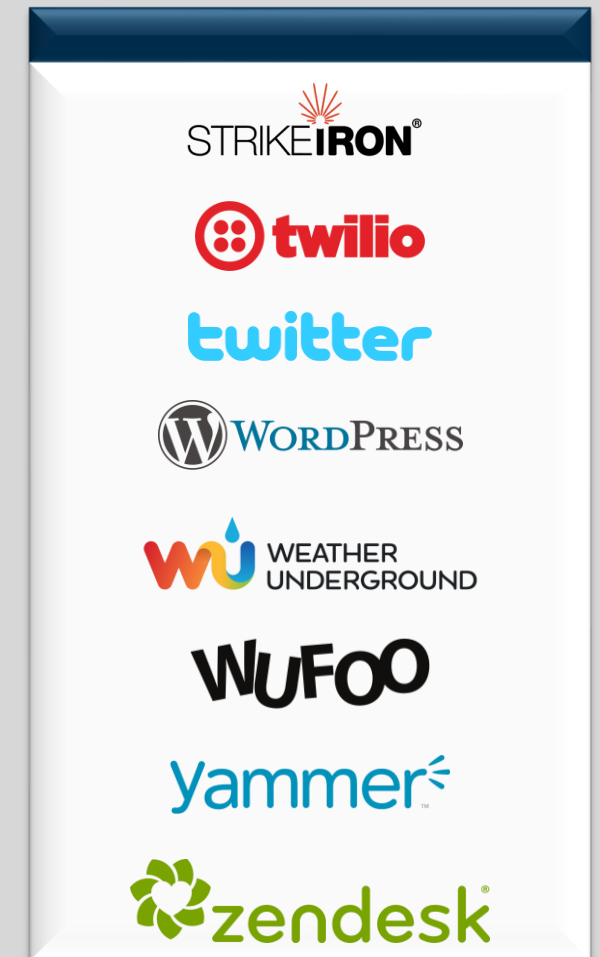
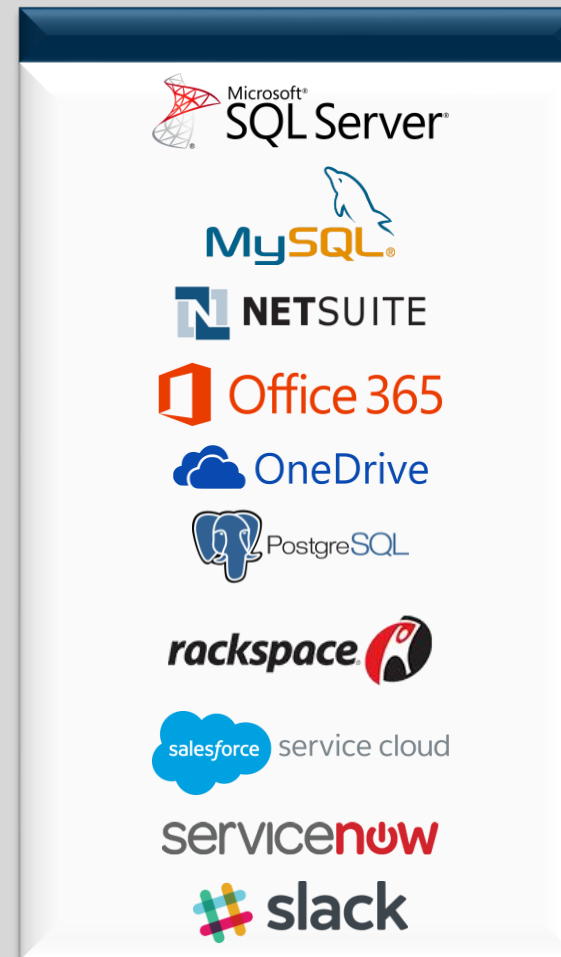
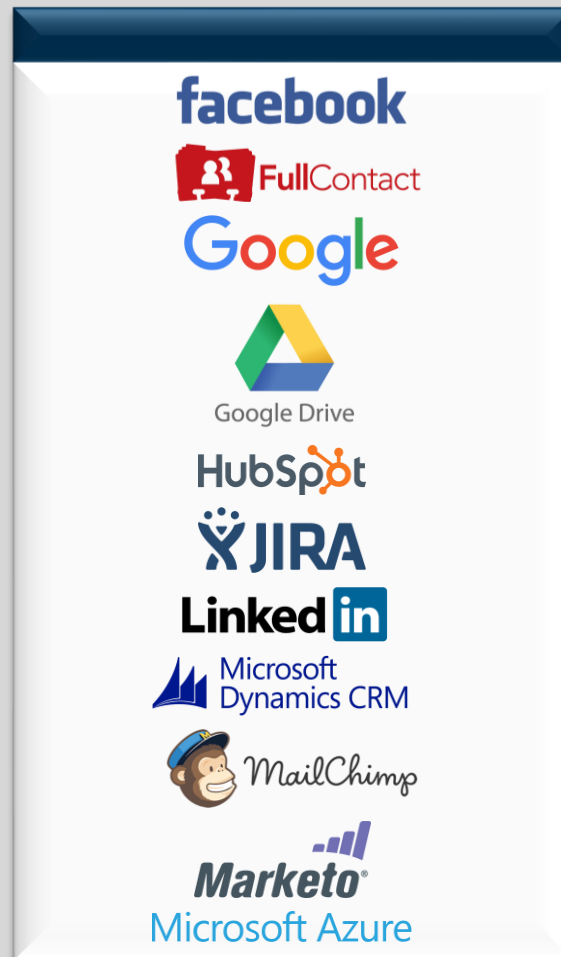
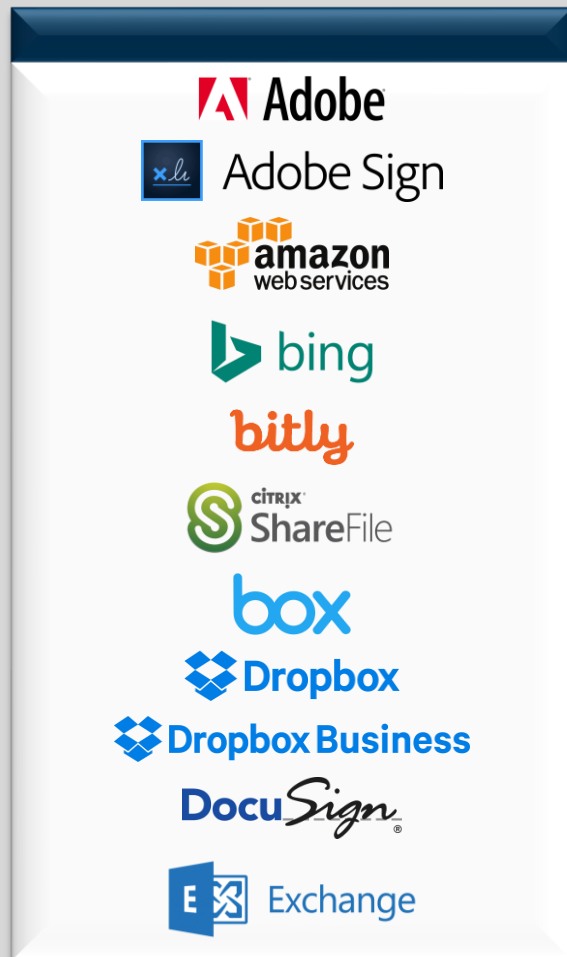
Productivity per user: ↑ 8% to 15%

Case study benefits:

- Improved business end-user productivity
- Improved IT FTE productivity
- Cost avoidance for prior workflow development
- Higher quality of work and reduced errors
- Improved engagement with customers
- Better compliance with external regulations

Connect Information in the Modern Enterprise

Deliver process automation with pre-built Nintex Connectors to:



Intelligent Process Automation with Nintex



Contracts

- **Contract generation**
- Proposal generation
- Customer order forms
- eSignatures



Business documents

- Quarterly bus. reviews
- **Pipeline reports**
- Financial forecasts



Consumption documents

- **Account plans**
- Channel reviews
- Customer activity reports



Site operations

- Openings
- Change requests
- Optimizations
- **Incident Reporting**



Demand gen

- Campaign planning
- Collateral review
- Press release approval
- **Lead capture**



Field service

- Safety inspection
- Site surveys
- Process compliance
- **Work orders**
- Site data collection



Quote to cash

- Large deal approval
- Rev rec policies
- **RFI/RFP**
- Credit and collection actions



Product innovation

- Requirements mgmt.
- Release management
- Stage-Gate process



Compliance

- **Monitoring/data collection**
- Quality control & testing
- Security controls
- Failover
- Incident management



Customer engagement

- **Customer feedback/CSAT**
- Product and service feedback



Employee engagement

- Employee on/off-boarding
- **Performance management**
- Ideation/feedback



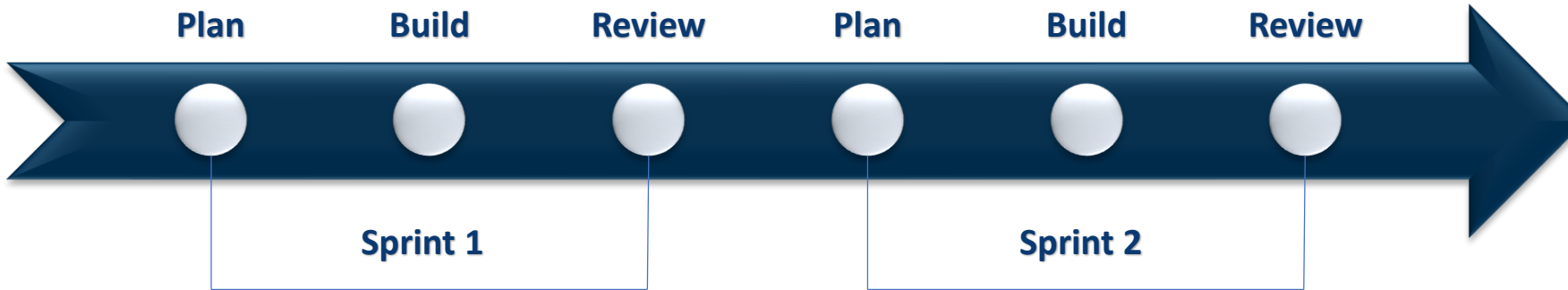
Sales success

- RFI/RFP management
- Pricing negotiations
- **SOW processing**
- CMU management



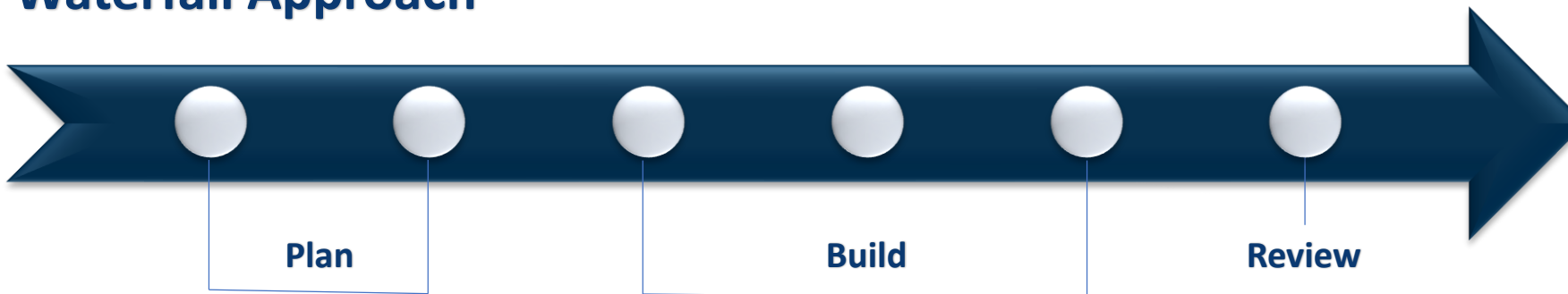
How To Modernize: Agile vs. Waterfall

Agile Approach



- Constant End-User Feedback
- Flexible & Lower Risk
- Business Oriented
- Fast time to Value
- Much more transparent look for the business into progress

Waterfall Approach



- Rigid with low end-user input
- Poor Change Management
- Long time to Value

Why Agile for the Modern Enterprise

The Impact of SaaS

- End-Users now expect to just turn on a solution
 - Immediate delivery
 - Retail Effect
- Driven by the frustration of the traditional waterfall methodology

Flexibility & Change Management

- Hard to avoid change, Agile's flexibility keeps that risk at a minimum
- By Modernizing with Intelligent Process Automation, your ready for change in the future without sacrificing process

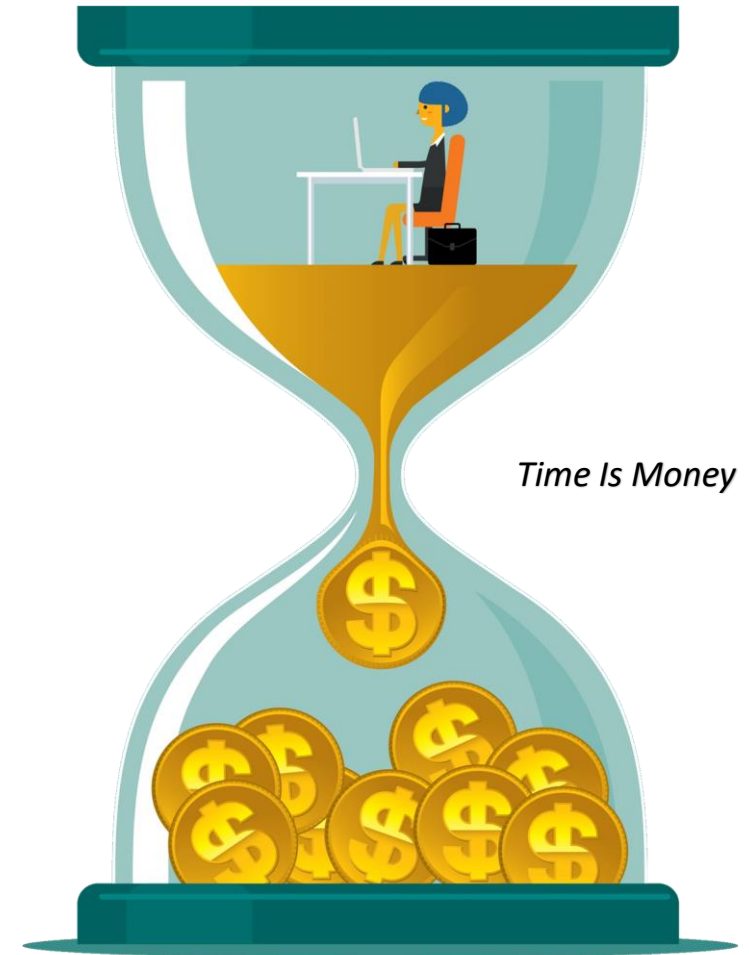
Business Involvement

- Agile keeps users engaged throughout the build of the solution



Concerns of Agile Development

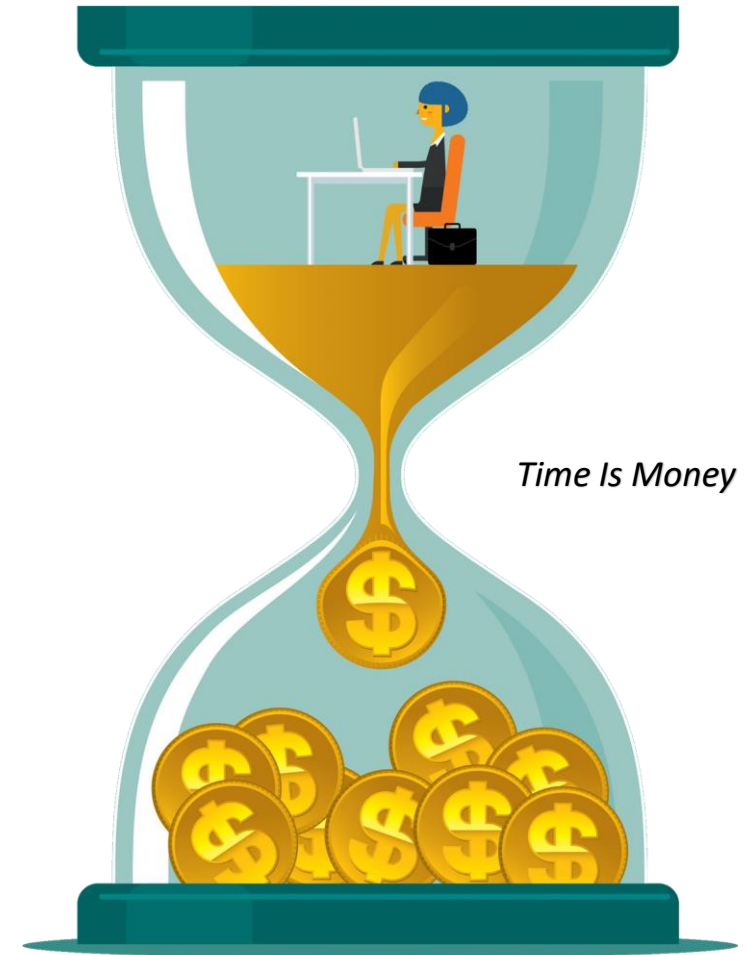
- **Running Meter**
- **How Do You Know What You Are Going To Get?**



Addressing Concerns of Agile Development

How to Address the “Running Meter”

- The reality is you actually get control of budget while maintaining flexibility
- You guarantee MVP (Minimum Viable Product) on a delivery schedule locked in stone
- Build what you can afford
 - Based on the remaining budget you release value added features
 - You can easily pivot on features
 - What you don't get to is next year's budget, but MVP and value add is a lock

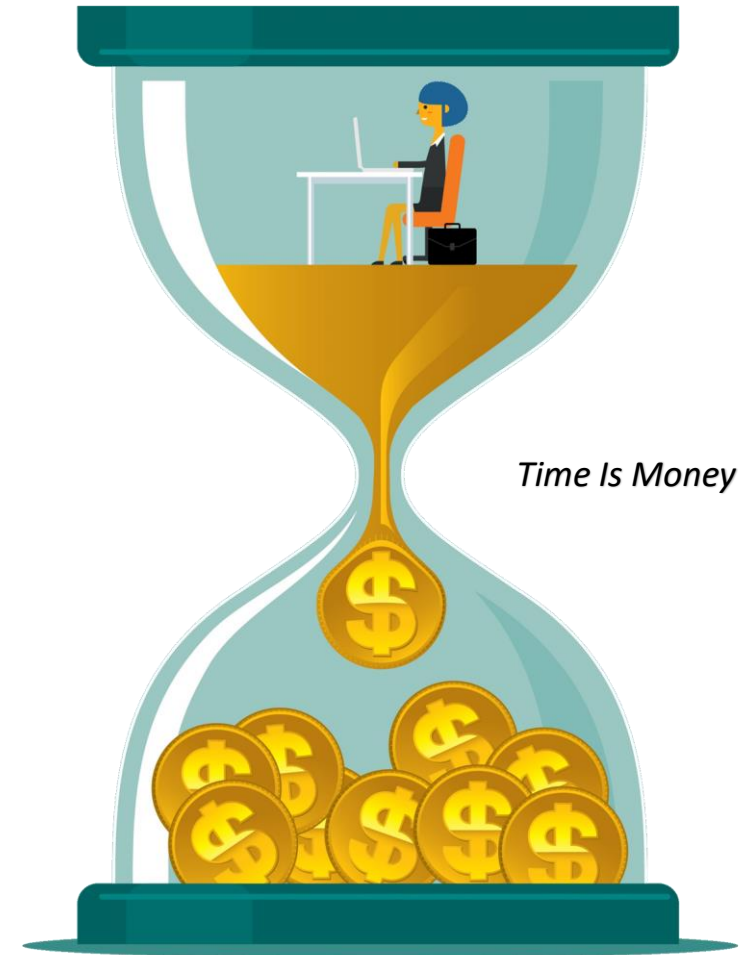


Addressing Concerns of Agile Development

How to Address:

“How Do You Know What You Are Going To Get?”

- High level up-front waterfall approach to schedule
- Clear definition of MVP
- Clear definition of MVP’s scheduled release
- List out value add features and their priorities
- Then enter into sprints
- Gain Involvement from the business
- Easily correct course quickly and transparently
- Review, Rinse and Repeat
- Flexibility to stay on budget and schedule



Advantages of Agile

Agile's true mission is a structured process that allows flexibility while maintaining controls and budget

Better on Cost Than Waterfall

- More predictable
- Less Risk & More Transparency

Agile is Very Scalable

- Frameworks to scale across teams regardless of size of institution or requirements
- Can have committees for features and set priorities
- Very easily achieve corporate goals in much shorter time frame than ever before



Advantage of Change Management with Agile

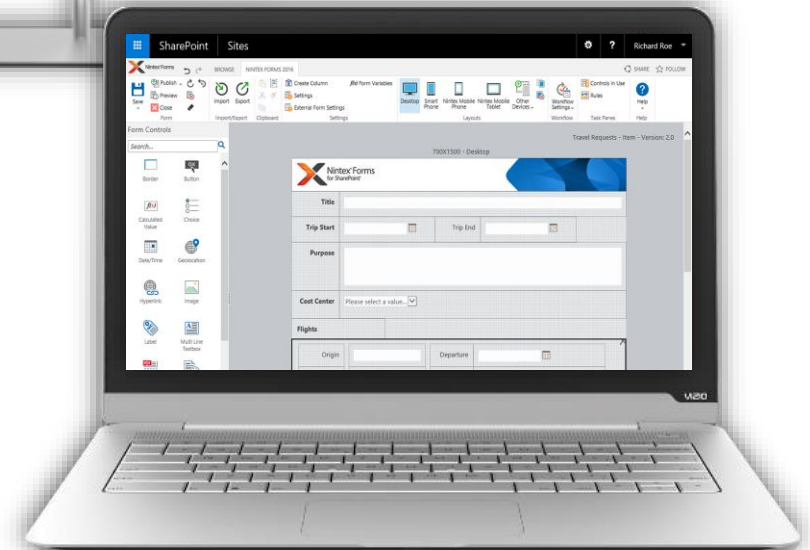
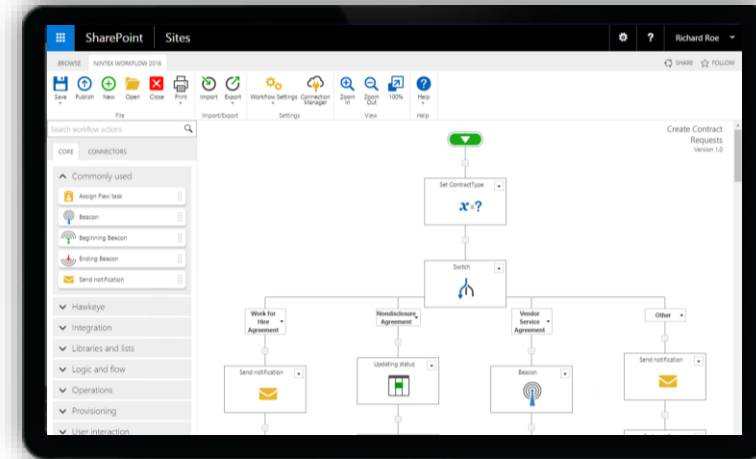
Greater Level of Flexibility & Ability to Manage Change

- Ability to make changes on the fly
- Greater sponsorship from business units for feedback
 - Not stuck on one main path – can adapt quickly to business needs
- Flexibility to bring in additional resources & cover gaps that you weren't necessarily aware of at the start
- Hard to know out of the gate what all of those things are
- Weekly Review Basis - Pivot Objectives
 - i.e. If someone is out or there is a new hire, easy to still stay on schedule & provide continuity
 - Gives more users a way to weigh-in without needing to constrain this to a small group



Nintex – Perfect for Agile Automation

- **Involves The Business**
 - No Code Solution – Drag & Drop
 - No need to review code
 - Easy to learn
 - More people involved, more productive you can be
- **Easily Adapt & React To Change**
 - Turn things around much faster
 - Quick from dev - to test - to build
 - Quickly access development
- **Know What You Will Get**
 - Nothing custom, easily scales
 - Built-In standards
 - Quickly see updates on screen to review
- **Has Support Network & Communities**
- **Broader Use Case On How You Can Use & Implement**



How To Modernize: Agile Vs. Waterfall



LEGACY APPROACH: WATERFALL

NINTEX APPROACH: AGILE

ARCHITECTURE

Rigid and transactional

Dynamic and flexible

INFORMATION SOURCES

Proprietary structured data

All content, interconnected cloud

DEVELOPER TYPE

Programmer

Business analyst/operations

DEVELOPMENT APPROACH

Structured, complex programming, static

Drag and drop—visual UX, evolving

TIME TO VALUE

Months-Years

Days-Weeks

REACH AND BENEFITS

Targeted, controlled users

Expansive, inclusive, and viral

Modernize Your Process with Gig Werks

Review Legacy Systems and Processes

Detailed use cases

Conversion Path

Documented Use Cases aligned to the recommended conversion path

Modernization Assessment

Detailed project estimate of transforming these systems to modern, automated solutions & applications.

Agile Solution Build

Intelligent Process Automation with Modern Tools (Nintex) connecting content across the enterprise



Questions & Answers

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