About Gig Werks

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

Awards and Recognition

- Microsoft Gold Partner since the firm's beginning in 2001
- Virtual Technology Specialists for the Microsoft New York Enterprise Group
- 5 Time Microsoft SharePoint Technical Excellence Partner Award Winner
- Approved Vendor of Microsoft Legal & 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

## Industry Business Solution Expertise in:

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

Modern Approach to Automation with SharePoint

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

The Modern App Model
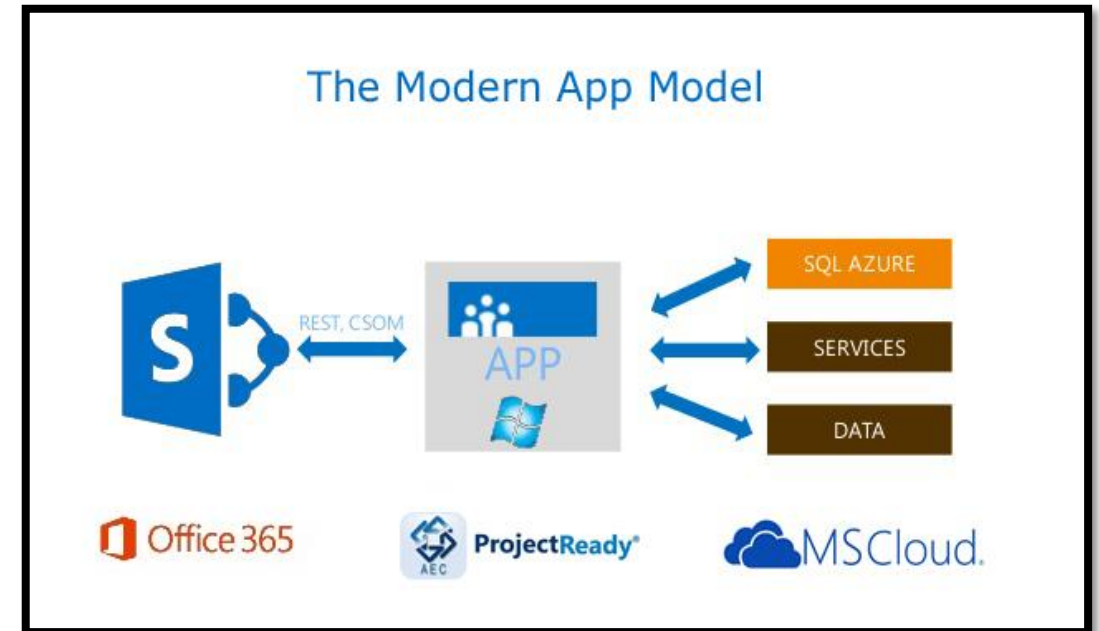
Solution Architecture: Then & Now

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 Need to Modernize & Automate Processes

- Drive Efficiency

- Drive accuracy

- Cloud Technology

- Connect Disparate Systems and Information

- Scalability

- Technology Limitations

- Significant Risk

- Legacy Systems & WSP's Do Not Work in the Cloud or Hybrid Environments
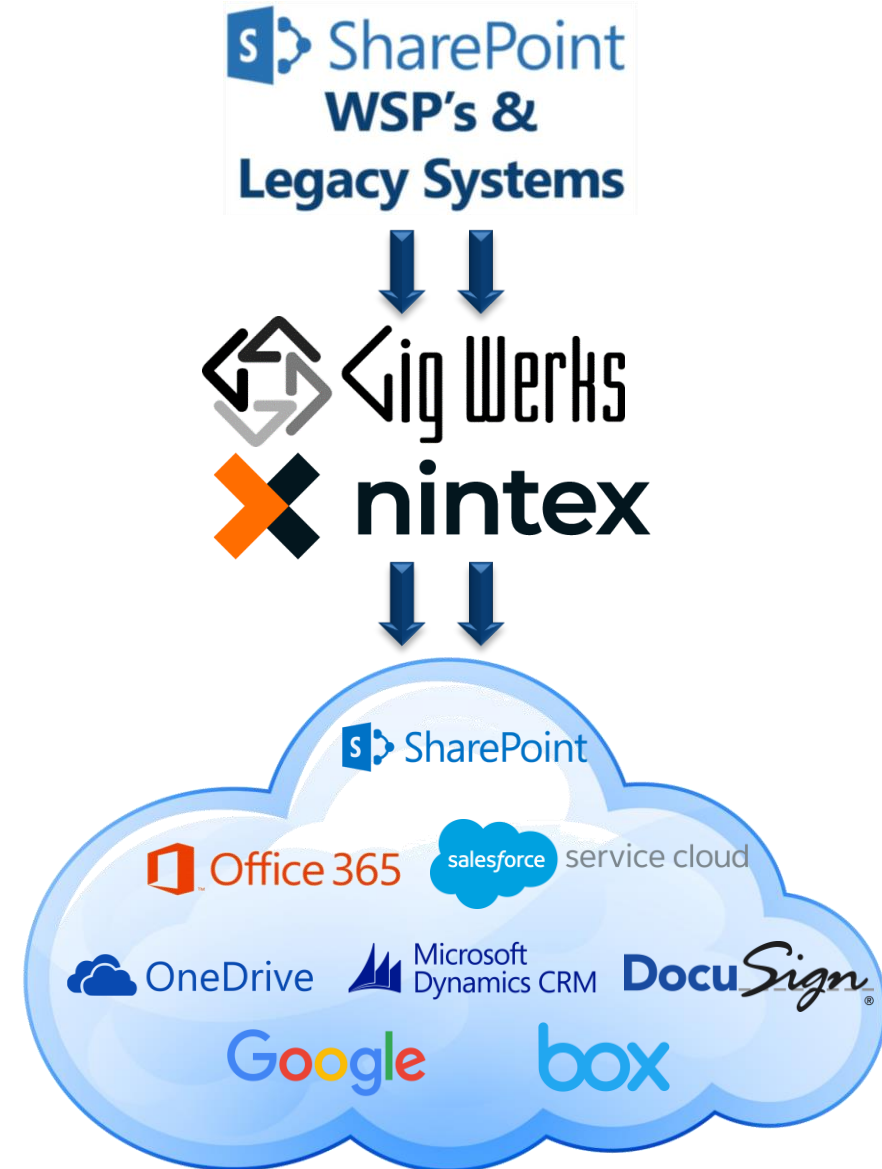
Why Automate Processes with Nintex

- One Tool to Automate All your Business Processes Across Departments & Use Cases

- Driven By the Business User (No Code)

- Easily Repurpose your IP to Drive Efficiency

- Rapid Build and Deployment

- Easily Manage and Adapt to Change

- Connect seamlessly to Cloud Systems Including:
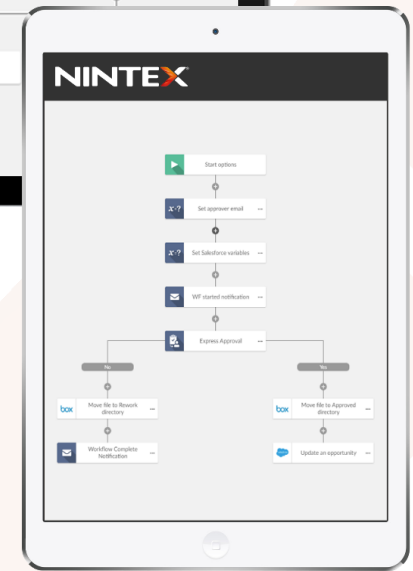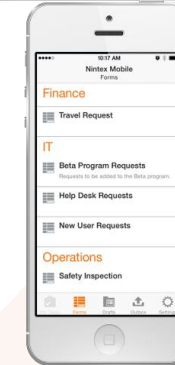
One Solution for All Departments & Use Cases

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

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

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

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

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

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

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

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

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

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

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

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

Process Automation Example: CLM

- Previously in our Modernization Series we built an automated process (Contract Lifecycle Management-CLM) connecting Nintex, Salesforce & SharePoint
    - Initiated a Contract from CRM or Salesforce
    - Generated & Managed Contracts with Nintex & SharePoint
    - Distributed Contracts with Workflow for Signature
    - Reported on Contracts with Nintex Hawkeye
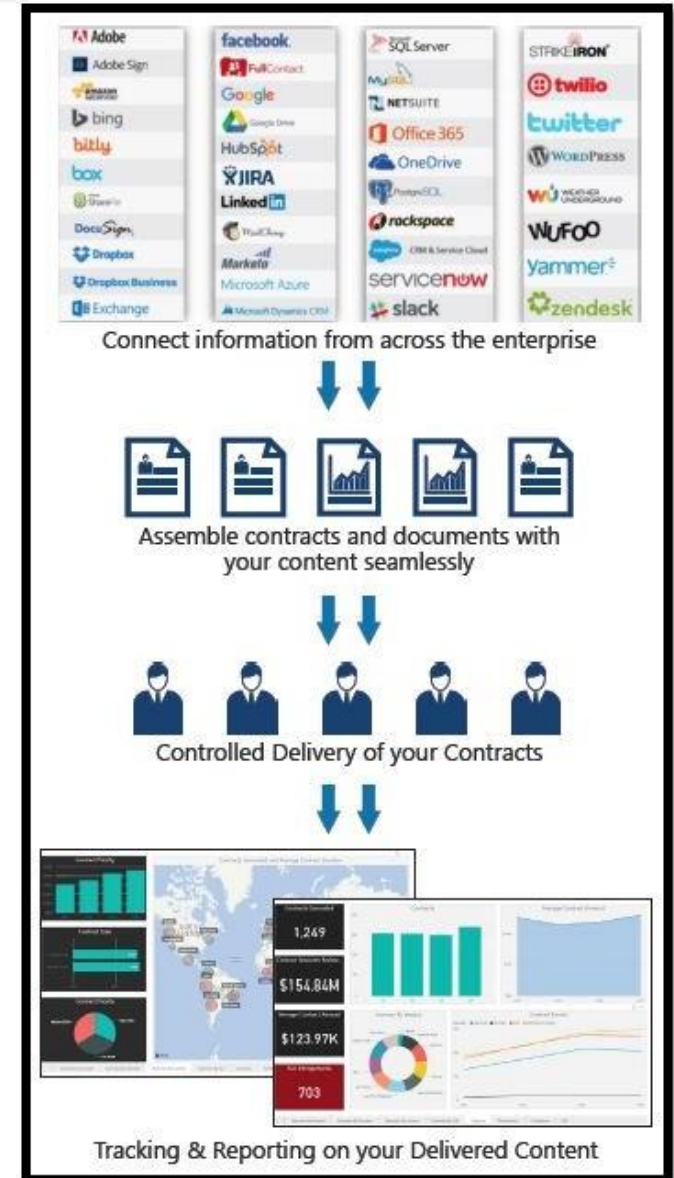   - Satisfied Business Needs & Requirements for CLM
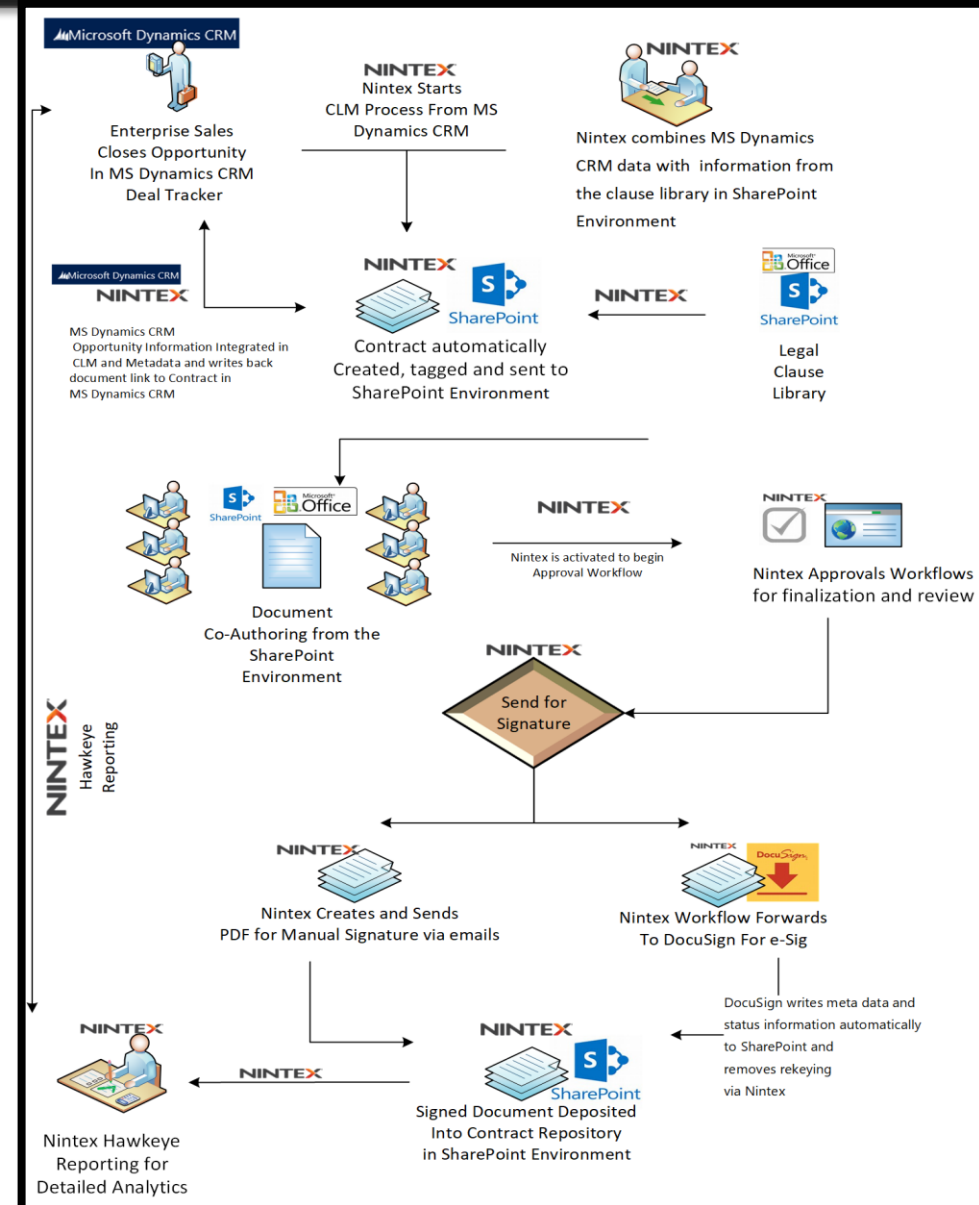
Needs & Requirements for CLM Automation

- Lost revenue through missed renewals or poorly leveraged contracts

- Single repository to store contracts across the organization

- Improved visibility of contract status, expiry, renewal and key obligation dates

- Improved collaboration across teams through contract lifecycle

- Better control over access and user permissions

- Common process for contract approval and sign off

- Streamlined and auditable negotiation process with external council and suppliers

- Holistic search and filtering to increase finadability

- Reduction in corporate risk
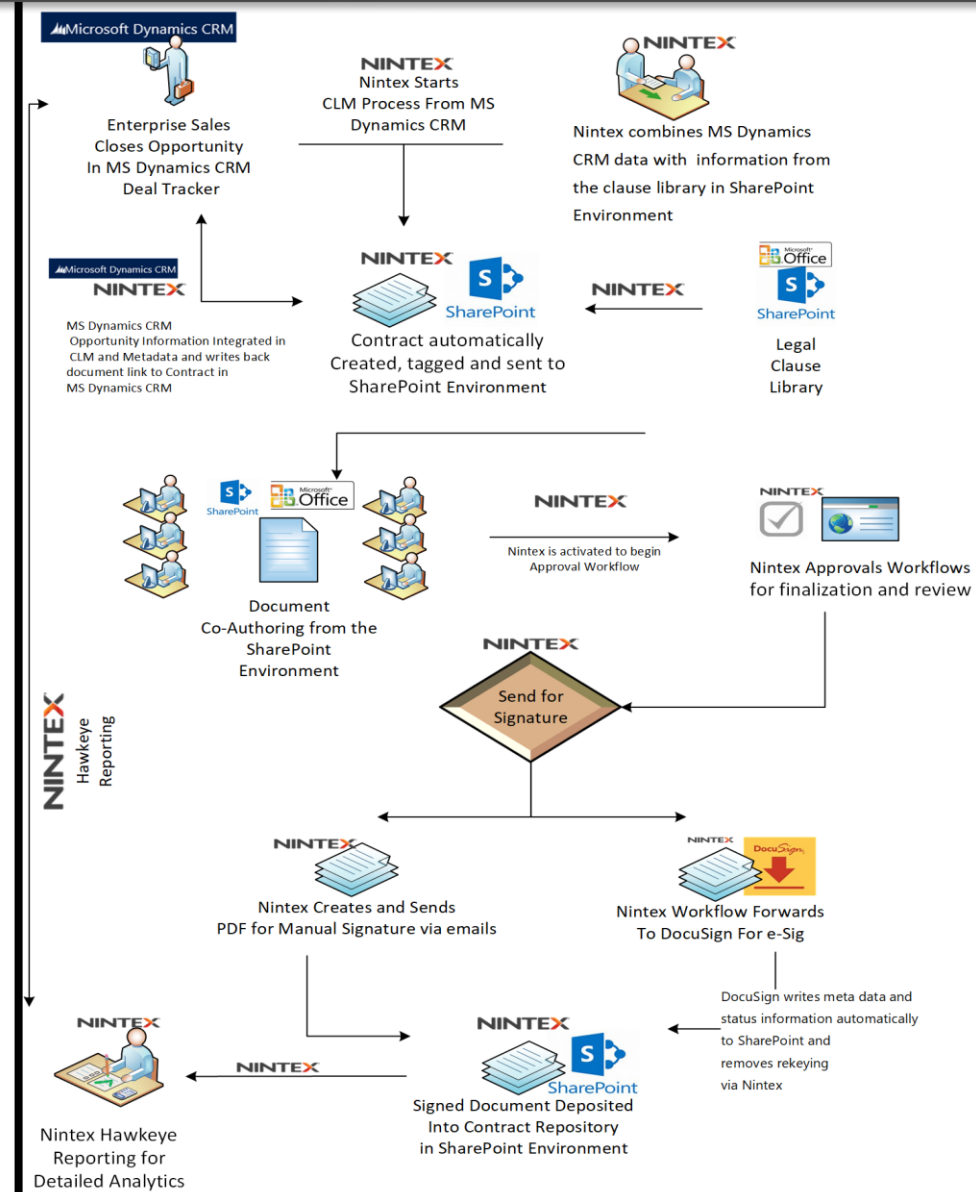
Benefits of CLM Automation Solution

- Leverage best in class document control from Microsoft and flexible process automation from Nintex

- Tight integration with Microsoft Office and Outlook for redlining, tracked changes and external collaboration

- Own and adapt the solution over time as your business adapts and grows in complexity

- Leverage native search, filtering, access control and governance of world leading platform Office 365

- Extend to your digital signature provider of choice

- Reuse functional modules across the organization for related corporate processes

Connect information from across the enterprise

Assemble contracts and documents with your content seamlessly

Controlled Delivery of your Contracts

Tracking & Reporting on your Delivered Content

Approach to Modernization

- **Previously in the Modernization Series we also discussed the Benefits & Best Practices Approach to Process Automation using Agile**

  - Better on Cost

  - Scalability

  - Greater Level of Flexibility & Ability to Manage Change

  - You guarantee MVP (Minimum Viable Product)

  - Constant End-User Feedback

  - Flexible & Lower Risk

  - Fast time to Value

  - Much more transparent look for the business into progress

- **The Agile Approach**

Plan	Build	Review	Plan	Build	Review

Sprint 1   Sprint 2
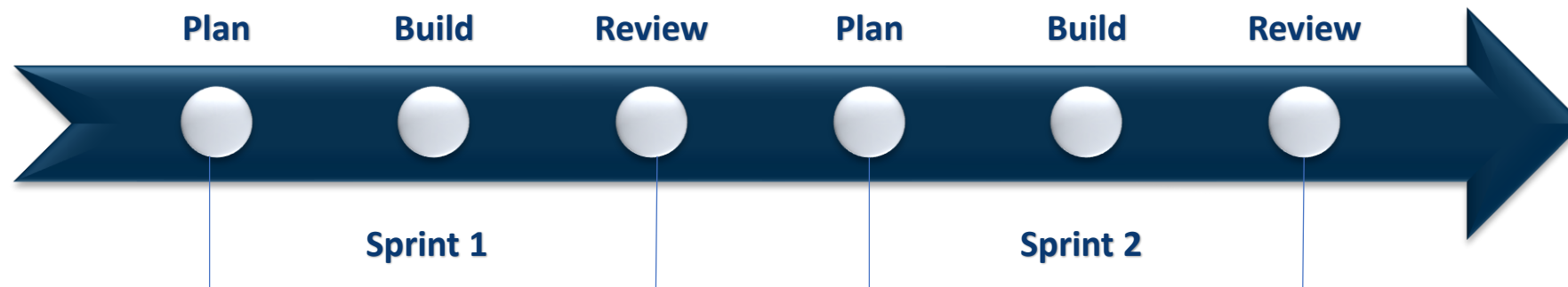
Why Agile for Modern Process Automation

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

Today's Demonstration

- Showcase the ease of reusing IP using elements of our CLM solution to satisfy new use cases and department needs

- Build Out New Automated Processes with Nintex and SharePoint

- Show the ease in which you can use Nintex and Connect Systems

  - SharePoint

  - Salesforce

  - CRM

  - DocuSign
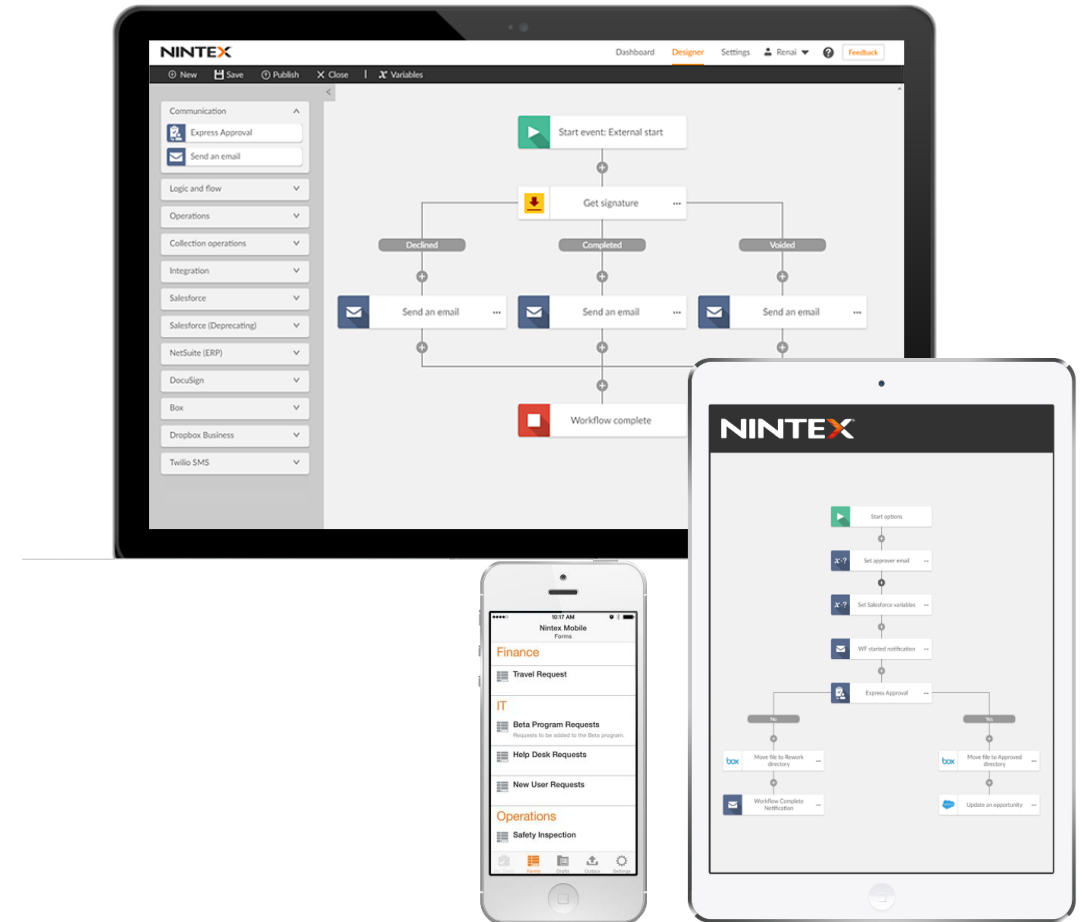
Reusability of CLM components

Process Initiation

- CRM record changes
- Wizard-based form
- Scheduled automation

Document management

Document Generation

- Contract templates
- Clause Libraries
- Ad-Hoc requests

Document reviews

Internal Approval Routing

- Cross-departmental
- Ad-hoc or prescribed
- External approvals

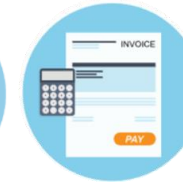**Discount approvals** **Purchase requests** **Travel requests** **Contract management** **Expense reports** **Account Reports** **Sales proposal** **Negotiations** **Contract management** **Invoice processing** **Contract renewal**

System Integration

- Secure storage
- CRM updates and links
- LOB system records

Opportunity management

Digital Signature

- Client approval
- Secure storage
- Legal admissibility

Vendor management

Alerting

- Renewals and expiry
- Updates or obligations
- Approval and reviews

Reusability of CLM components

Sales

Finance

Legal

Opportunity management

Sales proposal

Discount approvals

Contract management

Contract renewal

Travel requests

Purchase requests

Contract management

Expense reports

Invoice processing

Document management

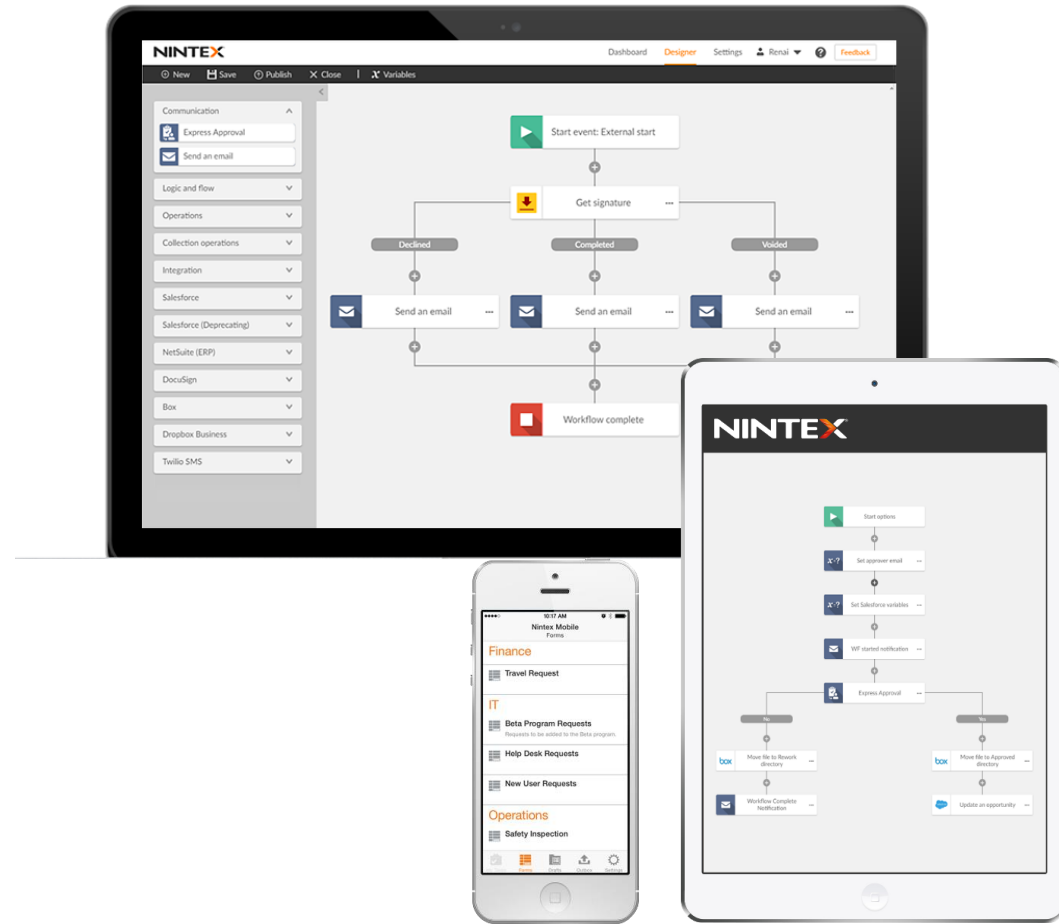**Document reviews**

Negotiations

Redlining

Vendor management

Live Demonstration

The Gig Werks Modernization Assessment

- The Gig Werks Modernization Assessment & Planning are applicable for use with Microsoft Programs (i.e. - BIF, DPS, etc.)

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

NINTEX PARTNER AWARD WINNER

Microsoft 5X PARTNER AWARD WINNER

Questions & Answers

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