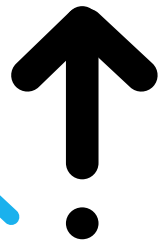


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Mobilizing for **Innovation**

A Blueprint for Rapid Automation Across the Enterprise

eBook

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Overview

The COVID-19 pandemic accelerated the pace of digital transformation and magnified the impact of existing market trends. What was once likely is now undeniable: Winning in a post-pandemic economy requires organizations to continually adapt and recognize that business and technology strategies are now intertwined. IT is no longer solely responsible for transforming the enterprise into a technology leader. To be successful, an automation-first innovation culture must permeate the enterprise.

This ebook highlights the market trends and challenges that IT leaders face in driving innovation and proposes a model for transformational leaders to meet these challenges. We detail the roles and responsibilities of both business and IT leaders and teams and offer a blueprint for rapidly implementing automation across the enterprise.

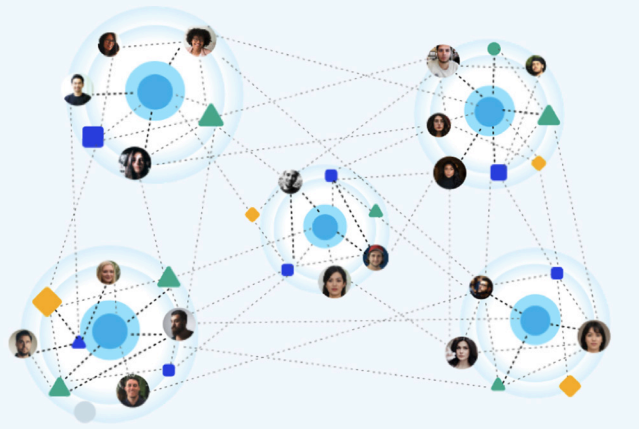
Changes and Challenges

Digital Maturity of the Market and Workforce

At the end of April 2020, Satya Nadella of Microsoft said, “We’ve seen two years’ worth of digital transformation in two months,” and the speed and scope of change have continued to accelerate. In a short time, a critical mass of companies achieved a base level of digital maturity, and many have since assimilated new technologies into business models and ways of working. At the same time, customer expectations have increased at an equally accelerated rate, rewriting the rules of competition.

Digitally mature organizations can react faster to market changes and customer demand. But as more businesses achieve maturity, organizations are faced with increasing complexity. This must be met with changes in structure to drive more agility and resilience to deal with increasing complexity. Many high-performing organizations are gravitating to “Innovation Squads.” In *Team of Teams*, General Stanley McChrystal writes: “Effective adaptation to emerging threats and opportunities requires the disciplined practice of empowered execution. Individuals and teams closest to the problem, armed with unprecedented levels of insights from across the network, offer the best ability to decide and act decisively.”

The Digital Enterprise gravitates to “Innovation Squads”



Agile and resilient way to deal with complexity

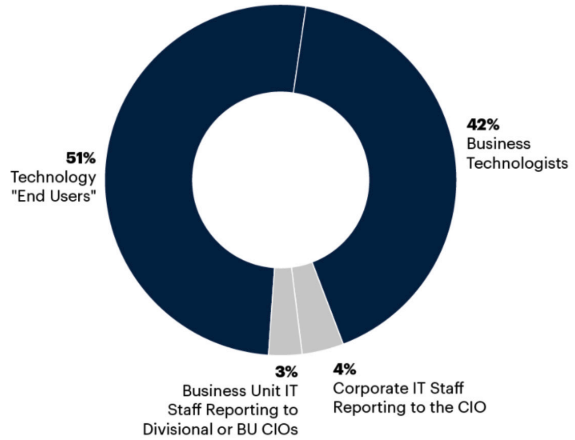
Makes maximum use of individuals and teams closest to the opportunities and challenges

Enables rapid innovation and business agility

Even before the pandemic, the increase of Millennial and Gen-Z employees in the workforce drove increasing digital workforce maturity. These digital natives grew up in a digital world and were already immersed in modern interfaces and user experiences. The rapid implementation of new technologies for remote work and touchless customer experiences forced older employees who had previously resisted modern technology to adapt to remain relevant.

This has resulted in a work environment where almost all end-users have a degree of digital fluency and where there's a growing number and the increasing importance of business technologists (also known as citizen integrators). These are the most digitally adept employees who modify, customize, or configure their own analytics, process automation, or solutions as part of their daily work.

Percentage of Employees Who Are Business Technologists

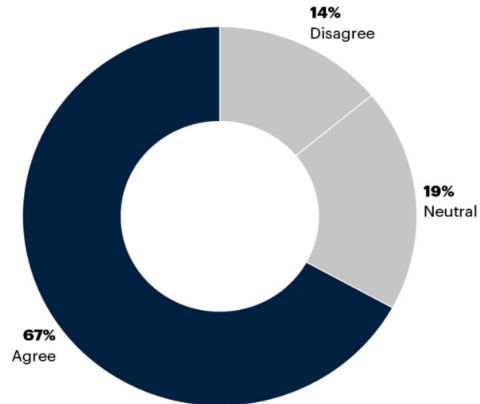


n = 3,626 MSE employees across the entire workforce
 Source: 2020 Gartner Digital Friction Survey; 2021 Gartner Reimagining Technology Work Survey
 Note: By CIO, we mean the senior IT executive. Titles may vary by organization.
 754977_C



Midsized CIOs See Business Technologists Providing Capacity for Digital Initiatives

Percent of CIOs Who Perceive Business Technologists as Providing Necessary Capacity for Digital Initiatives



n = 85
 Source: 2021 Gartner CIO Talent Planning Survey
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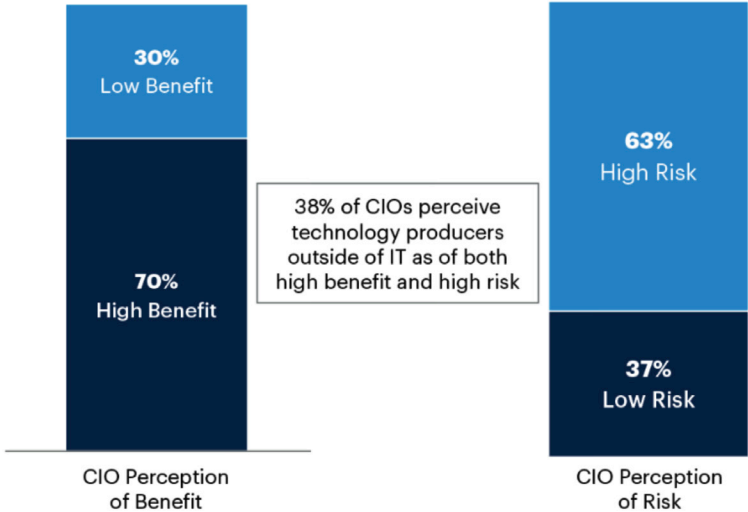


The Challenge for IT Leaders

IT leaders must meet the needs of both technology end-users and business technologists. All employees expect high performance and anywhere access to tools and systems. They demand instant information for decision-making and delivering customer experiences with proven, trusted, and timely data. However, the initial rush to digital transformation relied on the rapid implementation of SaaS applications, which were often implemented with minimal or no IT oversight. This has resulted in system and information silos. Business processes generally span multiple business functions and systems. Effective decision-making requires data from multiple, disparate systems that is often hard to access and make actionable.

IT leaders must identify and implement integration technology and strategies to enable business process automation and provide actionable data. To be successful in these efforts, IT needs to partner with business technologists. As noted above, the majority of CIOs believe business technologists provide the necessary capacity for digital initiatives, with less than 15% disagreeing. While this presents a major opportunity, there is also a perception of risk.

CIO Perceptions of Risks and Benefits of Business Technologists



n = 84 MSE CIOs
Source: 2021 Gartner CIO Talent Planning Survey
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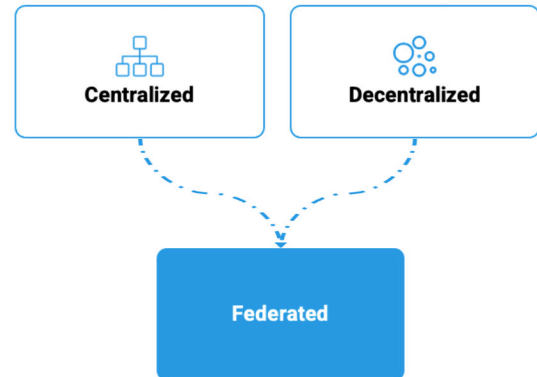


To meet the needs of business technologists, organizations must provide tools that enable DIY ingenuity, experimentation, and innovation. This must be balanced, however, with proper controls to maintain security, compliance, and effective IT operations.



A New Model for IT

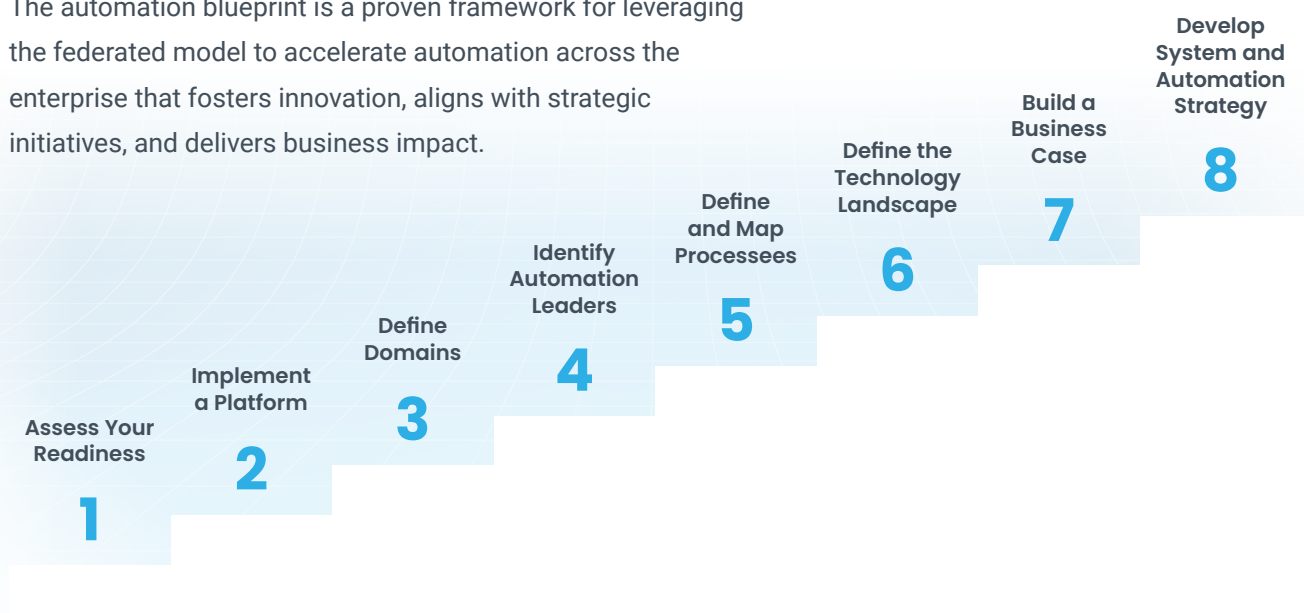
To address these challenges, many IT organizations are adopting a “federated” model to enable Innovation Squads and drive increased automation across the enterprise. A traditional, centralized model for automation ensures governance but creates bottlenecks that slow automation and limit innovation. While a decentralized model maximizes agility, there are higher security and compliance risks. There are also greater challenges in coordinating teams in automating processes that span multiple departments or functions.



In the federated model, IT transitions from delivering process automation and integrations to enabling business teams to implement and maintain them. IT defines governance and security policies, manages controls, helps to coordinate across functions, and provides guidance and support. Business teams can more freely innovate as they are empowered to automate processes and modify them as needed without IT. This provides enterprises with greater agility.

The Automation Blueprint

The automation blueprint is a proven framework for leveraging the federated model to accelerate automation across the enterprise that fosters innovation, aligns with strategic initiatives, and delivers business impact.



Step 1: Assess Your Readiness

Is your organization ready for a rapid enterprise-wide automation initiative? A key prerequisite for a successful enterprise-wide automation initiative is understanding the organization’s maturity in several key areas.

Using the model below, give your company a score of 1 to 5 for each area.

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Automation Readiness		<ul style="list-style-type: none"> Give your company a score from 1 to 5 for each area. Define which areas you'd like to improve over the next 12 and 36 months. Eliminate the blockers and implement the enablers that will help you achieve your improvement goals. 				
		 IMMATURE We almost never work this way	 TRANSITIONING We often work this way but not always	 MATURE Working this way is second nature		
		We sometimes work this way	Frequently work this way			
Leadership Support	Strategic guidance	1 Leadership does not provide explicit strategic guidance for automation	2	3 There is some strategic guidance for automation but limited to core business processes	4	5 Leadership provides strategic innovation guidance at important meetings and everybody knows it
	Prioritization	1 Resources for automation are on an ad-hoc project basis	2	3 Resources for automation are available, but they are not substantial and not protected	4	5 Resources for innovation are institutionalized with at least 50% of their time dedication to automation
	Resource allocation	1 Leadership does not provide explicit strategic guidance for innovation	2	3 We make investments innovating some business processes but its largely opportunistic	4	5 Leadership is eager to invest in business process automation to foster innovation across teams
Organizational Commitment	Legitimacy of effort	1 Automation initiatives are skunk works done without IT/Business systems team knowledge	2	3 Automation initiatives are owned by IT/ Business Systems with budget allocated	4	5 Automation initiatives are company-wide with every department allocated budget to innovation
	Cross-functional commitment	1 Business process automation teams are limited in scope to their own departments	2	3 Automation teams include representation from multiple teams but there are conflicts	4	5 Policies and clarity of ownership make it easy for automation teams to collaborate as equals
	Alignment to business goals	1 Automation teams do not tie initiatives to larger business goals vs. solving immediate pain points	2	3 Automation initiatives must tie to business goals but little to no tracking of impact	4	5 Automation initiatives clearly tie to one or more business goals with reportable metrics
Automation-First Adoption	Automation tools	1 We largely rely on native integrations to help automation parts of business processes	2	3 We largely rely on native integrations to help automation parts of business processes	4	5 We use a holistic automation platform that enables us to automate common and custom processes
	Automation skills	1 We don't hire for process automation skills and don't develop them in-house	2	3 We hire for in-house technical developers to build automations	4	5 We hire technical and develop non-technical staff to support process automation company-wide
	Business process evolution	1 Our business processes are not well defined or broadly understood	2	3 Our business processes are not well defined or broadly understood	4	5 Our business processes are well defined and our business goals clear

This baseline number represents your current state. Identify the areas that you want to improve and set targets and dates to reach maturity milestones.

Step 2: Implement a Platform

Implementation of a scalable automation platform is foundational to enterprise-wide automation. For fast-growing businesses, or indeed any business that wishes to compete in a post-digital economy, a cloud-native Integration Platform as a Service (iPaaS) is the best option to automate business processes at scale. An iPaaS accelerates the integration of new SaaS technologies into business processes and helps create seamless, unified customer experiences, enabling business teams to obtain real-time data and aggregate data from multiple sources for analytics.

While a traditional iPaaS will provide these benefits, these solutions are more limited because they are designed to enable the IT function to address integration problems across the enterprise to maximize the productivity of technical resources.

An advanced iPaaS enables everyone in the organization to proactively address integration problems across the enterprise and drive continual business performance improvement to maximize organizational agility. The greater democratization of integration tools and skills leads to improved automation, analytics, speed, and accuracy of key business processes. All of this accelerates growth, fosters innovation, and drives a competitive advantage.



Ready to start your automation journey?
Read our ebook to learn more.

Download

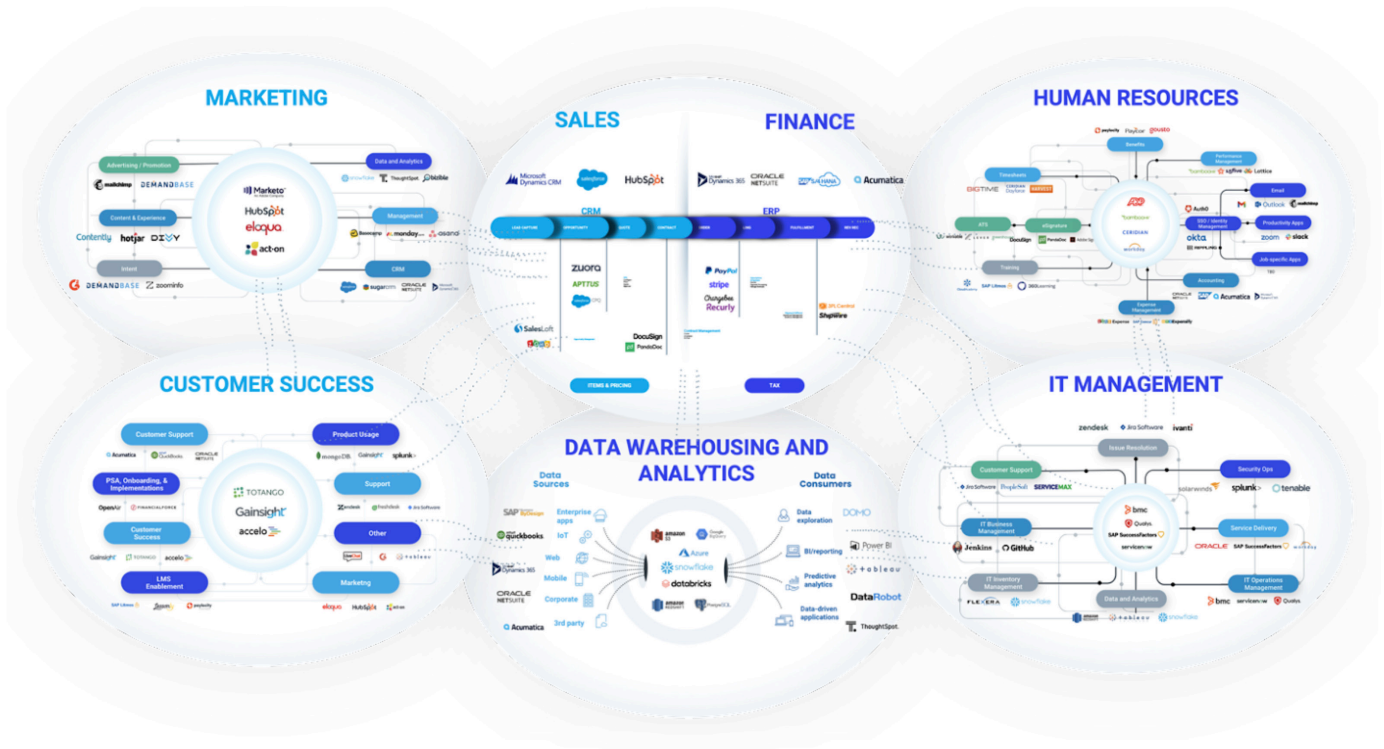


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Step 3: Define Domains

Domains represent functional areas within your organization. In the context of automation, domains consist of processes, systems, and teams. Some domains align strictly with specific departments, while others encompass processes and systems that span department boundaries.

Here is an example of domains you would find in a typical SaaS enterprise.



Step 4: Identify Automation Leaders

Automation leaders are business technologists who will lead the automation efforts in their respective domains and collaborate with business teams, IT, and automation leaders from other domains. They will lead the implementation and management of solutions and organize and enable other business users.

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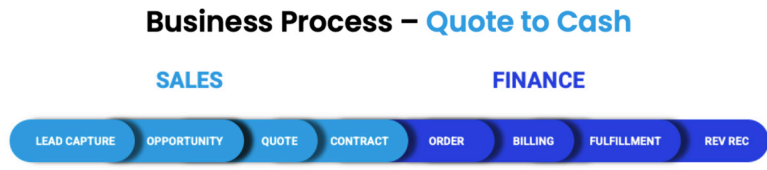


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Step 5: Define and Map Processes

Within each domain, automation leaders collaborate with other subject matter experts (SMEs) to identify and map processes to be automated. Again, a domain can (and often does) span departments. For instance, quote-to-cash is a common business process that includes activities performed by sales and finance teams.

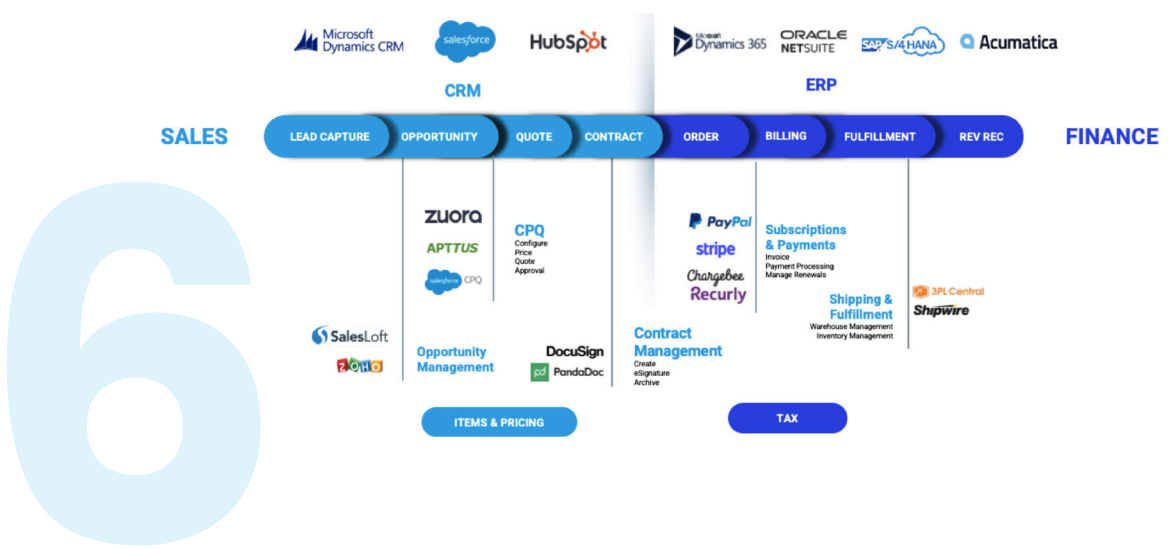
The business teams then analyze their processes to identify bottlenecks, areas requiring human interaction, resource-intensive or repetitive tasks, and areas where accurate and timely data is needed.



Step 6: Define the Technology Landscape

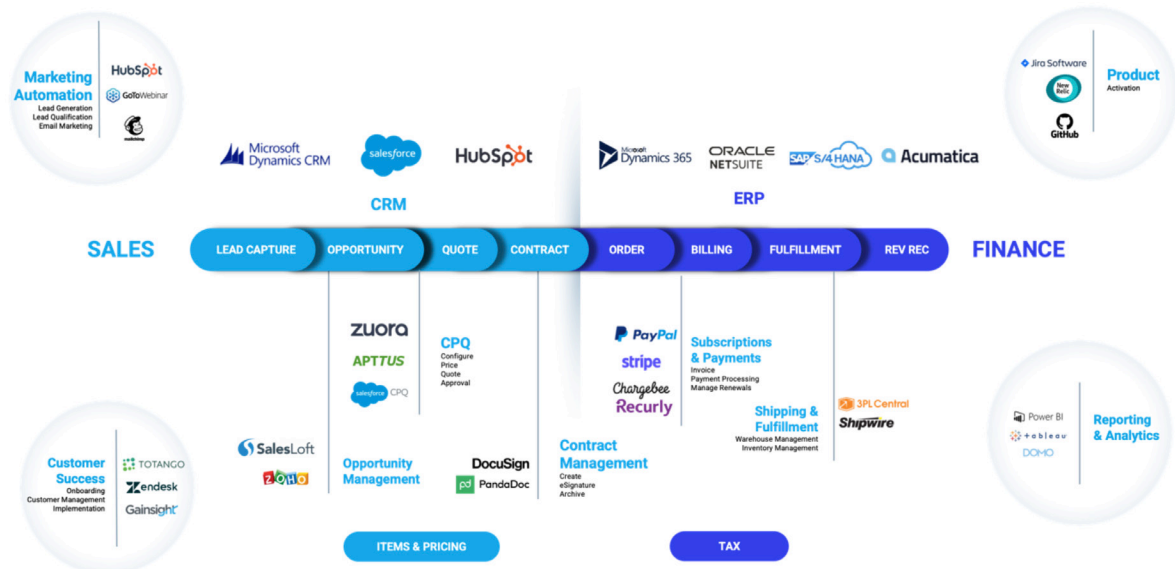
The first part of defining the technology landscape is for the automation leaders to identify and document systems directly involved in their processes. In our quote-to-cash example, the process is anchored by the CRM and ERP systems while additional systems provide required functionality in areas like opportunity management, configure, price and quote (CPQ), contract management, subscription and payment management, and shipping and fulfillment.

The figure below includes examples of popular apps that provide functionality common to this process.



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Next, map additional systems from other domains that provide the data required to support automation (or the needed data that is generated by the process). Commonly, automating quote-to-cash requires additional data from the marketing automation, customer success, and product management domains. Output from this process is crucial for reporting and analytics.



Step 7: Build a Business Case

Automation leaders should build a business case for every proposed business process automation project. This starts by identifying and documenting desired business outcomes and measures of success. By definition, process-based improvements must anchor the business case and some combination of financial, people, or customer-focused outcomes that will be used to quantify the potential project value.

<p>Financial</p> <ul style="list-style-type: none"> Reduce order processing costs by 50% Return 40 headcount hours back to the business Revenue growth Refunds reduced by 10% <p>Measures:</p> <ul style="list-style-type: none"> FTEs involved in order processes Time to process an order 	<p>Process</p> <ul style="list-style-type: none"> Increase number of orders processed per hour by 40% Reduce order errors by 90% <p>Measures:</p> <ul style="list-style-type: none"> Time to process an order Number of rejected orders by fulfillment Percentage of orders with errors
<p>People</p> <ul style="list-style-type: none"> Reduce contract/temp labor Increase FTEs job satisfaction with more meaningful work Increase capacity to start new initiatives <p>Measures:</p> <ul style="list-style-type: none"> Employee satisfaction Employee retention Number of concurrent corporate initiatives 	<p>Customer</p> <ul style="list-style-type: none"> Increase 5-star reviews by 40% Increase repeat orders by 60% Reduce customer support tickets by 20% <p>Measures:</p> <ul style="list-style-type: none"> Positive reviews Repeat orders Customer ticket volume

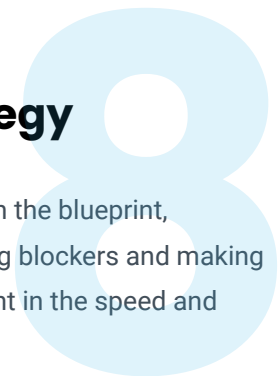
Next, measure the costs of the current process.



Finally, model the cost of the automated process to determine the value potential of the automation.

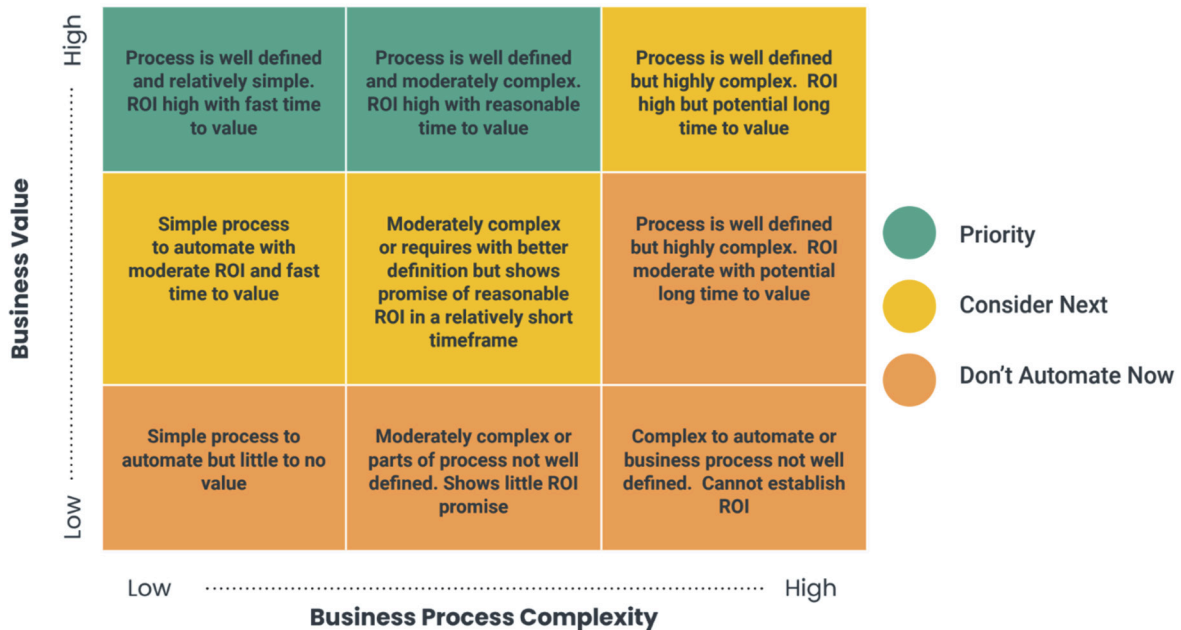


Step 8: Develop System and Automation Strategy



A system and automation strategy is based on the learning gained by working through the blueprint, starting with the Maturity Assessment. The strategy should be grounded in eliminating blockers and making improvements to work toward maturity goals, which will enable continual improvement in the speed and quality of enterprise automation.

The next potential automation projects need to be assessed to manage the project portfolio effectively. There are two key factors in prioritizing automation projects. The first is Business Process Complexity, which is based on the findings in [Step 5 \(Define and Map\)](#) and [Step 6 \(Technology Landscape\)](#). The second is Business Value, defined in [Step 7 \(Business Case\)](#).



It's recommended to start with projects with high business value and low or moderate complexity, which will provide faster times to value and allow automation leaders to gauge the time and effort required to complete future projects.

After completing the initial round of projects, automation leaders should be able to implement and manage simple automation projects within their domains with minimal assistance from IT and can (and should) develop and manage an implementation roadmap for their team's projects. IT and automation leaders should collaborate in developing a roadmap for more complex projects, especially those that span domains, which are reviewed and updated regularly (and as needed) when major projects are completed and business needs or the technology landscape changes.

Project Execution

Working on the blueprint will provide you with a strategic plan to enable rapid automation across the enterprise, but success requires the continued execution of individual automation projects.

We've identified six crucial steps to successful automation projects.



The Celigo Platform



The Celigo platform is a modern iPaaS and an ideal solution for organizations who want to leverage a federated model to accelerate automation across the enterprise.

- **Best-in-class business process automation development workspace:**
Through a powerful yet approachable user experience and by leveraging AI, Celigo allows IT and non-IT users to build custom integrations, mappings, and embedded business expertise to automate and optimize any business processes.
- **Prebuilt business process automations:**
Powered by our Integration Application Framework, only Celigo delivers managed prebuilt integration applications that include embedded business expertise to automate up to 100% of a business process. Based on best practice learnings from thousands of customers and using AI, business processes are not just automated but optimized. Because they are managed, new capabilities are constantly added, and API updates are automatically pushed, ensuring business continuity and added value over time.
- **A self-service platform for business teams with enterprise-grade governance:**
Enable IT and business teams to build, manage and monitor the business process they own while ensuring unified best practices, data security, and scalability to meet the needs of the business today and in the future.

**Accelerate your digital transformation
through end-to-end process automation.**

Click the button below or [reach out](#) for a customized automation roadmap.





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