

4 TIPS

TO GET C-LEVEL
SUPPORT FOR YOUR WORKFLOW
AUTOMATION PROJECTS

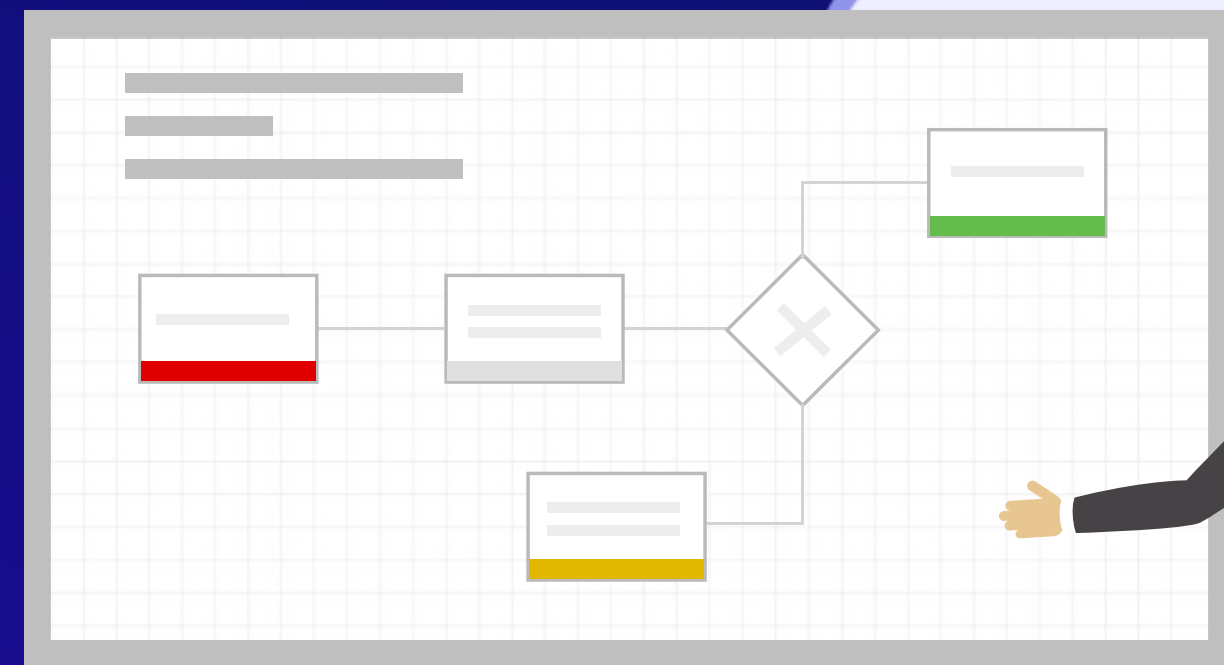


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Imagine that a brilliant idea for a business-changing project strikes and you simply cannot stop thinking about it. You have carefully examined its value, realize its potential, and you're determined to bring it to life. Then reality hits: a lack of budget, support, time, or resources, you name it. As a result, your innovative idea never sees the light of day. Sound familiar?

Since 2006 we helped hundreds of organizations worldwide digitalize their businesses and successfully manage and thrive on change. We have seen firsthand how crucial it is to **properly introduce an idea to C-level management** in order to maximize the chances they green light a workflow automation projects.

Even the most ingenious ideas are doomed to fall into oblivion without proper preparation and lobbying within the organization. It's not just about the technology being introduced, but about making sure your company is ready and willing to turn your ideas into reality. We have identified 4 proven tips to help prepare you prior to pitching your idea to boost the likelihood that your project is recognized and accepted by decision-makers.

Workflow automation is our area of expertise, and we used it as the example here, but these tips are universal and can be applied to any idea you plan on selling inside your organization. We hope this e-book will be a useful tool for you and all of your future ideas!



1ST TIP: IDENTIFY ROADBLOCKS

According to Gartner, two-thirds of all business leaders believe that their companies must pick up the pace of digitalization to remain competitive.

That does not mean that two-thirds of the companies are ready and willing to engage in digitalization initiatives. One of the decisive factors to consider when promoting a new idea is to be aware of what can go wrong, and why it may never really take off.

- **A LACK OF APPROVAL**

which may be a result of insufficient understanding of the initiative, fear of change, internal politics, etc.

- **A LACK OF BUDGET**

which might result from the project lacking sufficient priority

- **A LACK OF TANGIBLE BENEFITS**

which often happens when the need for change and expected benefits are not presented in a plain and convincing way



2nd TIP: BUILD A STRONG BUSINESS CASE

What is a business case?

A business case is a written or verbal value proposition that captures the reasoning behind initiating a project or task.



Any idea without a business case has a slim chance for success.

A carefully constructed business case creates a great roadmap for your audience. In an evidence-based business case for a workflow automation project you present the current state of process performance, areas for improvement, expected costs and benefits, time frames, parties involved, risks etc. This ensures that everyone involved is well-informed and on the same page. Since the proposal is designed to solve specific problems in your company, people will be much more keen on investing their time to set things in motion and get final approval.

In the beginning was the Process

When choosing your first process to optimize using a low-code platform, we recommend a “start small, go big” approach. To help you identify which process to choose, we’ve listed things to look out for to identify which candidates to look for, and which to avoid for your first project:



Quick wins

A process you can implement quickly and with little investment. These often begin as Proofs of Concept or pilot implementations, for simple tasks like a gift approval process.



Low-hanging fruits

A process that is not overly complex, but at the same time involves many people and has the potential to noticeably optimize and improve their duties. These include leave request and travel expenses processes.



Time-consuming, repetitive activities

Any burdensome and time-absorbing activity that employees have to go through on daily/weekly basis, like invoice approval requests.



Highly complex processes

These are complicated processes to analyze which may require months to deliver. The inability to see quick results often kills morale and interest, which increases the risk of failure.



Highly distributed processes

Steer clear of processes that involve numerous divisions, regions or countries which increase complexity. The decision process alone might take months.



Politically charged processes

Avoid processes that might be affected by internal politics. In these cases even strong data and logical arguments may not be enough.

The 5 things to remember when writing a business case



Identify area of improvement

Find the process that needs optimizing and evaluate who would benefit from its automation.



Define current state

Assess how is the process carried out today.



Define metrics and success criteria

Be specific. You need to prove that whatever you do, contributes to the company's efficiency.



Remember about bigger picture

In case of success, you could be asked to optimize another processes, so keep that in mind during your first implementation.



Don't forget to address the risks

Highlight the benefits, but address the risks and how to control them. It's often that decision-makers prioritize risk management.

When writing a business case you must remember to identify the area(s) to be improved, the current state of affairs, define metrics and success criteria (KPIs), and to always remember about the bigger picture. To get the answers for the first two steps, we recommend going directly to those who know best: the employees.

We the people

In order to identify areas of improvement and define the current state of affairs, **it's best to talk to the people directly involved in the processes** you want to improve. Getting their perspective on what's particularly painful in their daily work, what takes them most time, and what simple, repetitive tasks that do not contribute to their core duties is exactly what you're looking for.

When investigating, keep in mind these 3 core questions to ask:

- **How are things done today?**
- **How could things be improved?**
- **What are the costs and benefits?**



3rd TIP: FIND A PROJECT SPONSOR

In many cases, finding a business case for something is not enough to initiate a new investment. In these cases, having a Project Sponsor goes a long way to securing resources (human and financial), as well as properly engaging relevant employees throughout the organization.

WHO IS A PROJECT SPONSOR?

The Project Sponsor is a person in the company, often a manager or executive, who has overall authority or accountability for your potential project.

With decision-making ability and budget flexibility, they take over responsibility for gathering the appropriate support for your project, promoting it to senior management, ensuring buy-in throughout the organization, and become responsible for delivering the agreed-upon business benefits.



Who makes for a good Project Sponsor?



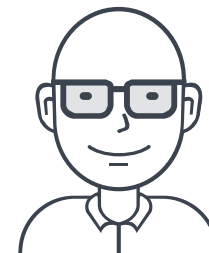
C-level

Senior management with influence and money is your best chance for the resources you need to get started with your project.



Department Manager

Aware of time-consuming activities that employees struggle with. Might be interested in optimizing them.



IT Director

Understands the benefits of implementing new technologies. Knows Power BI will be more effective than Excel.



Project Champion

“The face” of the project with leadership skills, marketing it throughout the organization, communicating benefits and involving others to participate regardless of his/hers position in the company.

Depending on the size and organizational hierarchy of your organization, the project sponsor may be a C-level executive, department manager, IT director, or any person who has the potential of becoming a project champion. When approaching your potential Project Sponsor, make sure to:

✓ **Talk business, not issues**

Don't focus on potential problems, tech talk and barriers. Highlight the benefits and profits or cost-savings that the project aims to deliver.

✓ **Craft your message to your audience**

Engage them in the project by showing the value he or she would get from implementation. Whether recognition, professional development, or teamwork improvement, identifying gains that match your audience's goals will go a long way.

✓ **Think about timing**

Consider your timing when approaching a prospective Sponsor. If your company is currently dealing with a crisis or is in the middle of implementing another big project, it might be better to wait it out. Unless, of course, if you can improve the current situation with your initiative.



4th TIP: "THE GUERRILLA APPROACH"

If you're unable or unwilling to win over a Project Sponsor, you can always try what we call **"The Guerilla Approach", which means implementing your idea under the radar.**

Using this approach you start with minimal expense while keeping in mind the bigger picture. If you can objectively prove that your idea benefits the company and delivers solid results, you'll be much more likely to gain the support you need and get the project back on management's table.



The 5 rules of “The Guerilla Approach”



Go low cost (software)

Use trial, demo or freemium versions of software as long as they allow you to deliver a proof of concept.



Select a proper case

Choose an easy-to-deliver process or selected part of a process to automate that, doesn't involve too much decision-maker input, and guarantees quick wins.



Go low cost (services)

If possible, try to convince a vendor to provide you with a proof of concept for free or within a budget that doesn't require additional approval. They share your interest in getting the project approved, and have the necessary experience and expertise to get your project on the table.



Measure results

Be sure to monitor the outcome of your proof of concept in order to present tangible results to management.



Make it visible for decision-makers

Make sure decision-makers can witness the benefits and experience the changes that your idea can bring to the organization.

It all boils down to IT

If all goes well, you will have a Project Sponsor, a business case to guide you through the implementation process, and a Yes from C-level management. Now, it's time to roll up your sleeves and get to work. To do that, you need the right tool to deliver results and consistently keep hitting home runs.

It's critical to keep the big picture in mind when choosing the technology you will use for your pilot project. Your chosen solution needs to be powerful, agile and scalable enough to let you build upon it after its implementation.

In the case of automating and optimizing business processes, **there's nothing more future-proof and efficient than low-code application delivery platforms**. This innovative technology allows you to turn ideas into advanced process-centric business applications, without the need for coding knowledge or waiting for changes to be implemented. Intuitive drag & drop technology lets you unleash your creativity and embrace the digital transformation in your organization. From supportive to business critical, low-code platforms enable you to optimize any process and deliver nearly any application your company needs to gain and maintain competitive advantage, while also letting you thrive in a dynamic environment with effective change management.



A low-code platform like [WEBCON BPS](#) enhances your business by taming and standardizing a wide range of processes, and ensuring that you're ready and capable of developing new, cutting-edge applications that drive progress throughout the whole organization.

A single, unified platform that is easily integrated with existing core systems (ERP, CRM, LoB) and limitless application delivery capabilities, delivers self-sufficiency and readiness for any business scenario. By delivering quick and efficient process optimization, C-level support quickly evolves from support into appreciation.

Whatever road you ultimately choose to take, remember that the hardest part is already behind you: coming up with an idea for improvement. In today's fast-paced world, successful businesses must react quickly, identify opportunities, increase productivity and be ready to adapt to ever-changing market conditions. If you've identified a way to meet those goals, you're on the fast track to success. Use these tips that we've learned through experience, and become an agent of change and pioneer of digital transformation in your organization!

Ready for your first successful workflow automation project?

Let's talk!

ABOUT

About the author

Michał Rykiert is a Partner Channel Manager and Senior Consultant at WEBCON. He's a driver for the international growth of the company through building partnership channel in the EMEA region. Michał has acquired broad experience through extensive cooperation with clients and partners.

This e-book was inspired by multiple Proof of Concept and pilot implementation projects aimed to provide hard evidence of the product's suitability, gain recognition within the company and speed-up decision-making process.

Michał is regularly being invited as a speaker to international conferences concerning Microsoft's technology stack, namely **European SharePoint Conference, European Collaboration Summit and SharePoint Saturday Events.**

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