

PLAYBOOK

Intelligent Decision Automation Playbook for Revenue, Operations and IT

How to scale your organization with intelligence and automation to digitally transform your revenue journey.

“

Holistic and Integrated Analytics Within an Intelligent Digital Workspace Ecosystem Will Drive a 70% Increase in Differentiated Business Outcomes for Adopters.”

IDC Futurescape Worldwide Future of Work 2023

Short on time - Read This:

- Sales cycles are longer and more complex while revenue forecasting and leakage continue. Sales teams are drowning and need a simpler and more efficient seller workflow - digital first & automated.
- Growth at all costs changed to growth efficiency and agility. The future of sales lies in expanding your view of revenue generation from just the sales team to all customer-facing functions.
- Intelligent automation technology offers a comprehensive alternative to sales manual processes and disconnected insights that are cost-effective and easy to use.
- **These playbooks and blueprints** show you how to leverage Intelligent Automation for scale, revenue and efficiency.

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The Revenue Landscape

It's super fractured and organizationally distributed.



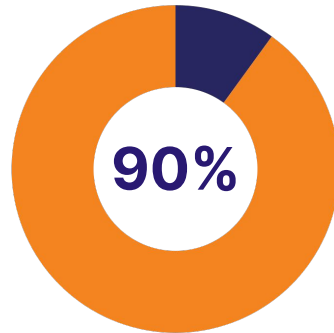
TRUSTED INSIGHTS

Predictable Revenue

Customer experience is the driving force of why people decide to work your brand. Without your customers getting what they need in an efficient way they'll likely look elsewhere for their needs.

For the most part marketing and revenue teams spend vast amounts of time on solutions that don't move the needle. They merely keep pace if at all with the market.

Many marketing teams have analytics tell them what has happened - simply counting clicks and not providing insight of what could happen. Settling to report their success as "influenced" rather than "created by".



OF COMPANIES REPORT THEIR CUSTOMER INSIGHTS NEED SIGNIFICANT IMPROVEMENT

While the average mid to enterprise size of organization has between 75-125 customer systems of engagement with more being added.

Source: Futurum Research and Microsoft

Revenue Planning and Financial Analysis Don't Add Up

Finance and accounting are some of the most important functions in your organization along side of revenue creation. Without it people wouldn't be paid, you'd be performance blind and yet a lot of this team is running off of spreadsheets.

While finance teams for the most part remain behind with legacy technology and marketing moves ahead with maybe not the right insights as decisions are being made from spreadsheets about how to allocate valuable resources.

**75% of Revenue Teams Miss Quota
Relative to Financial Planning**

Source: 'Impact of disconnected revenue from financial planning', Forrester

Current Challenges



Creating Data ≠ Creating Insights

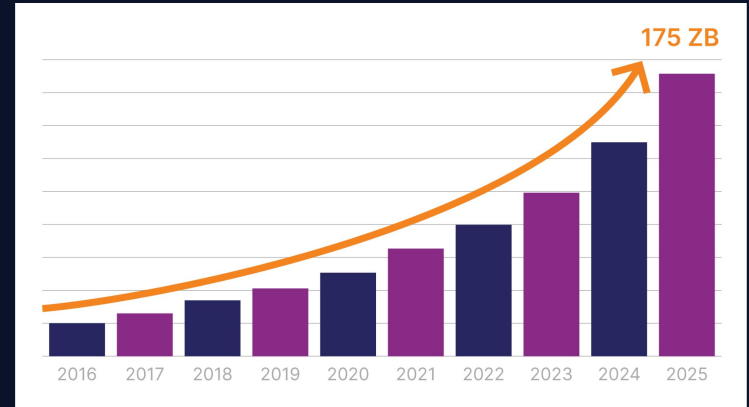
To become a top performing organization you can't just crunch numbers - you have to develop insights

The challenge IT has in this context is that focus has been put on automation at the process level - doing the same thing faster with less people - and not what it all means. Insight automation is being lost.

Automation in sales is lagging

Which of the functions within your organization have already automated at least one business process?

% of respondents, N=764



IDC says that by 2025 175 Zeta bytes of data will be produced or more than 10 times 2015 yet only 5% of it will be moved forward into the next year. A tremendous opportunity to improve data usage.

Challenge #1

Scaling Good Decisions

For your team and those around you maintaining operations at scale is hard enough. Now continuously add new information that has to be factored into the decision making process and execution pipeline then things can quickly degrade as processes can't change fast enough to the inflow rate of new information.

Manual and fixed rigid processes along with spreadsheets aren't a scalable way to maximize your data's value.

35,000 Decisions a Day

The average person makes 35,000 decisions in a day of which 227 are of contextually high importance and are made with incomplete information.

Dr. Joel Hoomans - Wesleyan: The Great Choices of Strategic Leaders



Challenge #2

Predictable Outcomes

As the amount of data in your organization grows exponentially your teams time to analyze it does not. Increasing staff counts works up to a point.

Slow decision making technology like spreadsheets and historical trend analysis can't keep up. Line of site decision support and insights that are actionable in the moment is what drives real value creation.

6 Billion Hours

per year are spent working in spreadsheets

26 Hours

are wasted in spreadsheets per week by high value team members

8 Hours

per week are spent repeating the same data tasks

Challenge #3

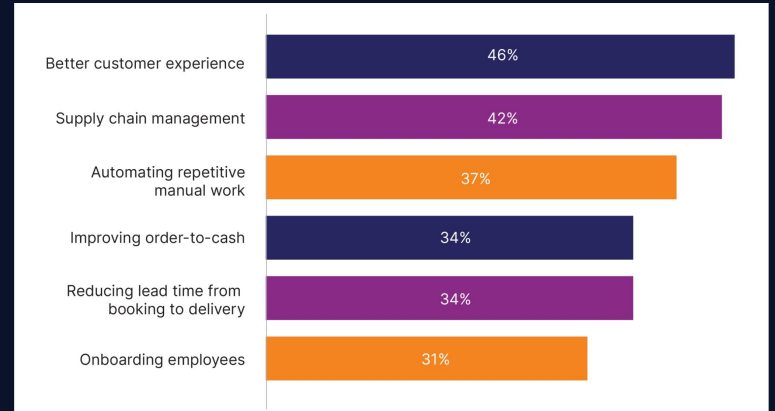
Achieving Sustainable Transformation

What digital transformation means for many is the automation of repetitive manual tasks within a system they work in.

What it also means for many is that they are just pushing more volume rather than increasing the quality of thought and still running into cross departmental barriers.

End to end automation with embedded insights at the right step connected with systems is what drives long term sustainable transformation value.

Globally organizations who lead say that automation is a core component of enterprise wide technology and solution requirements needed for growth.



IDC FutureWork Leadership Survey

Finding the Right Solution



**THE DATA LOTTERY
WINNER TAKES IT ALL**

**You already know
that competitors are
changing how they
work around you.**

Insights and scalable decisions require analytics to be part of the way people work - not just in a checkpoint or a scheduled review.

Intelligent Decision Automation (IDA) solves this barrier to high quality decisions. It's a modern insights technology that combines predictive analytics, process and human in the loop decision support.

The best part is this technology is designed for people to be easy to use, turning your employees into insights specialists and analysts into business movers.

Challenges

Solved

#1 - Scaling Good Decisions

IDA helps you automate the insight creation process and bringing them to the people who need them most, ensuring new processes and employees are making the best possible decision at every moment.

#2 - Predictable Outcomes

Repeated analysis of more and more facts don't have to consume all of your data teams time or take up more of your time to validate. With IPA predictable outcomes are integrated into your teams decision making process and the best part is you don't have to buy a long list of expensive point solutions. With one platform, you have everything integrated and available at your fingertips.

#3 - Achieving Sustainable Transformation

Intelligent Decision Automation lowers the barrier to entry problem with no code predictive analytics, integration and human in the loop decision making tools through an easy to use interface so you can make immediate decisions. It's designed for enabling better decisions, which means higher confidence in outcomes and less hassle.

Three Blueprints

For Revenue Creation, Process Automation
and Data Science



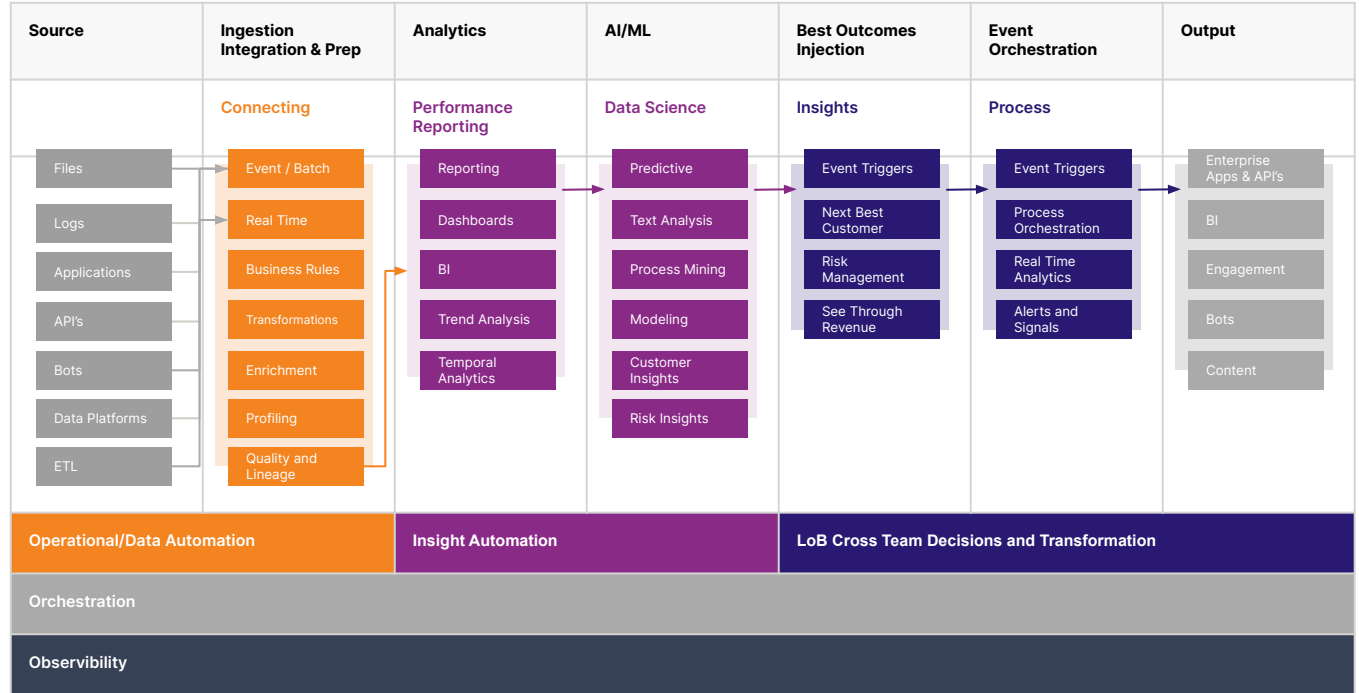
How it fits together

When things run smoothly people gain value when they can make effective decisions and operate effectively.

It starts with making the right data accessible and information available to the resources that need it most when the it's needed.

This platform view of how Put It Forward Intelligent Automation Platform fits into your data stack and how it works with solutions you have and processes that you need to improve.

In the following pages you'll see two common use cases solved by Put It Forward Intelligent Automation Platform that customer success teams are solved for.



Blueprint #1: OpenTable

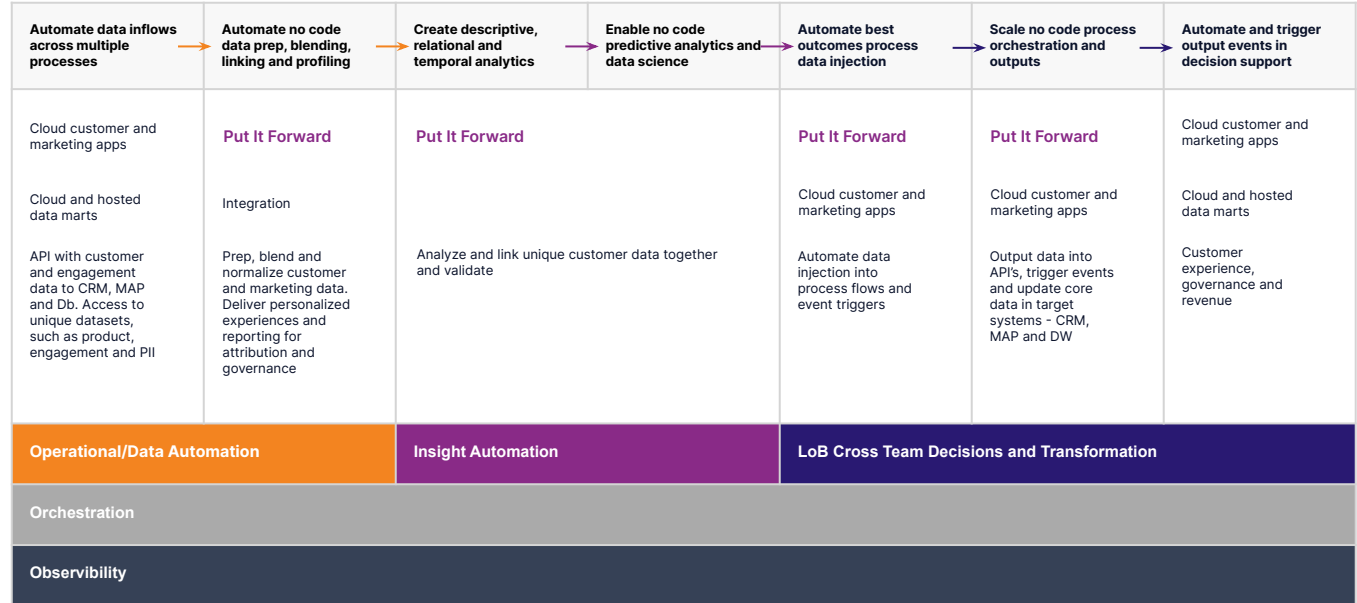
Process Automation and Data Insights for Customer Experience

Each year over a billion people choose their seat at a restaurant or bar by creating a booking through OpenTable. Owners and managers of experience destinations need to know exactly how things are performing.

Whether it's booking a table at your favorite restaurant, when you're travelling or you're an owner or manager of a restaurant it's success comes down to customer experience.

OpenTable who is a leader in the customer experience booking category needs to ensure that their customers, the owners and operators of customer experiences are themselves having the best possible experience.

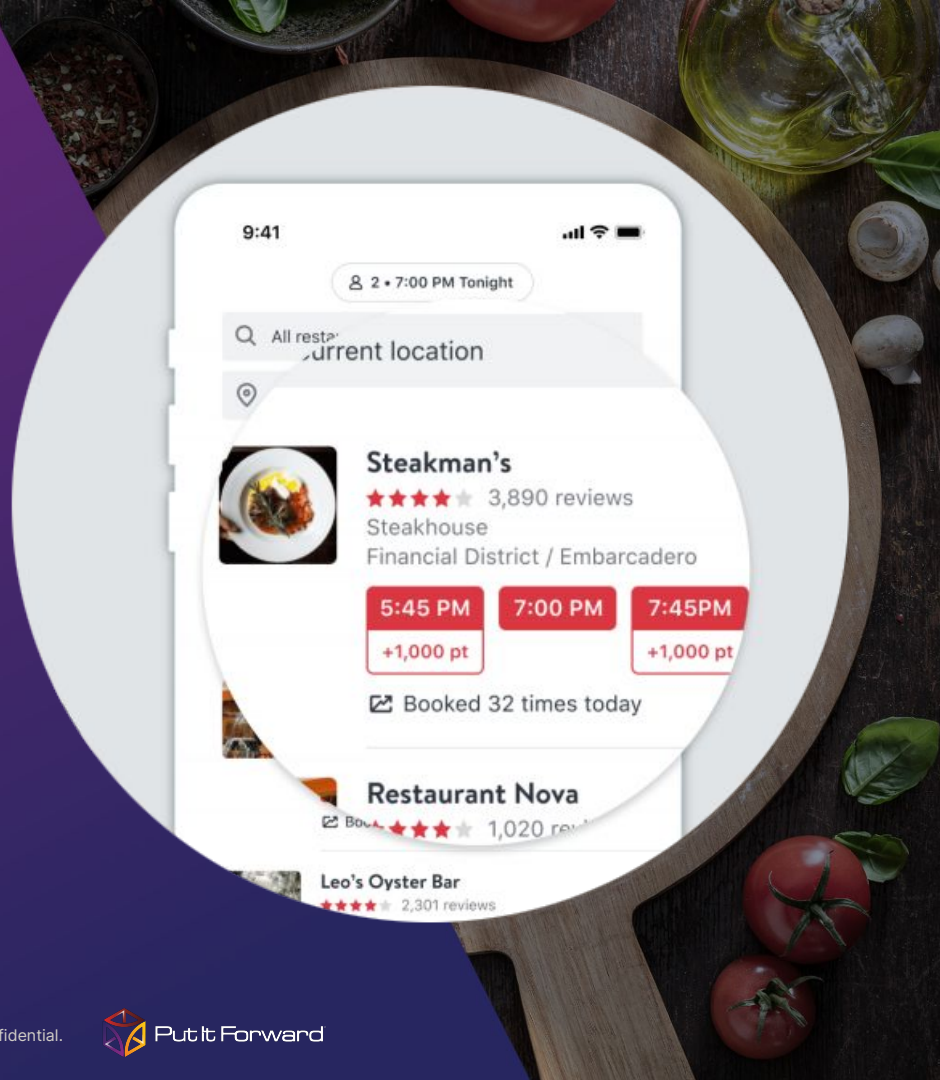
Using Put It Forward Intelligent Automation Platform they can now deliver highly personalized and targeted experiences to organizations looking to leverage the OpenTable Platform.



This blueprint represents a generic use case scenario for customer experience process automation and insights

• OpenTable®

- Deeply Personalized Experiences
- **80% Annual Cost Savings**
- Largest Global Booking Platform



Blueprint #2:

Revenue Creation Automation - Better Decisions at Scale and IoT

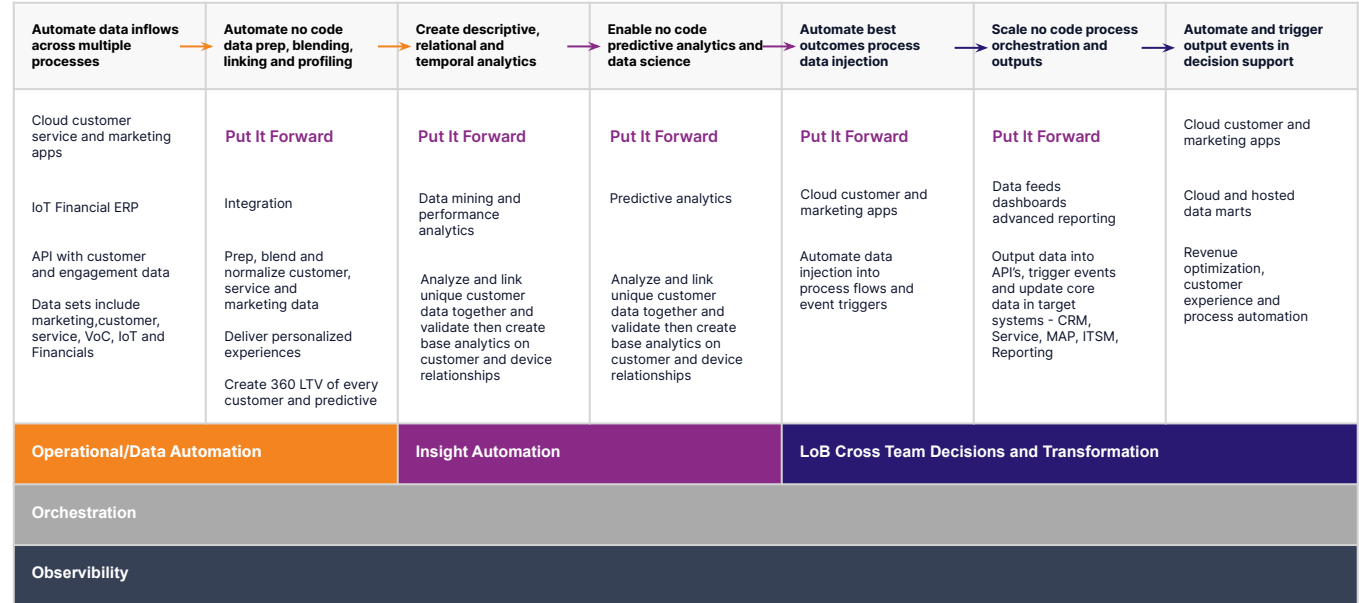
Some say that the sounds we hear and feel are the ultimate experience which connect us all together.

SoundUnited which creates some of the most iconic brands in the world of audio centered experiences has customers which engage across multiple brands and channels.

Using the Put It Forward IDA Sound United is able to unite the end to end customer experience across channels, devices and media.

They can now quickly market cross brand and channel with messages that resonate and understand at a detail level what each customer is doing along side of their lifetime value.

This let's Sound United be highly targeted with it's messaging, spend and marketing reducing cost, improving experience and leveraging the network of connected devices to a new level.



This blueprint represents a generic use case scenario for revenue automation



**SOUND
UNITED**

- Complete Customer Experience Automation
- Predictive Revenue
- **#1 Category Leader for Revenue Per Customer**

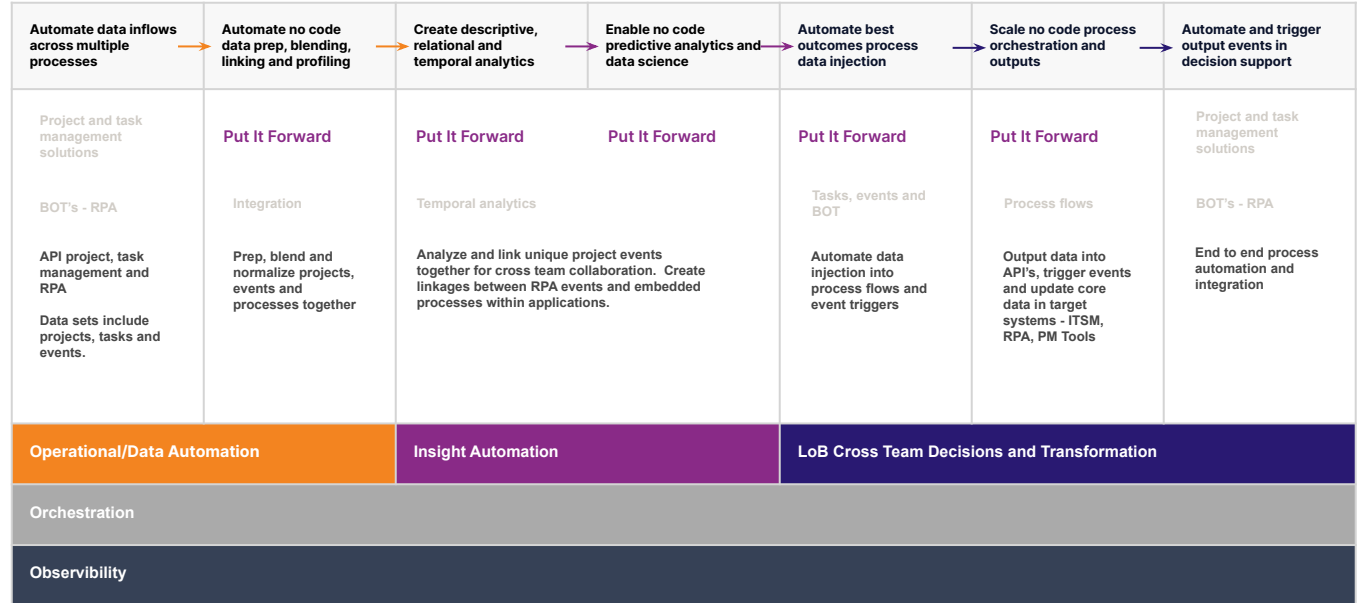
Blueprint #3:

Blueprint #3: End to End Automation for IT

End to end automation is made complex because automation solutions like RPA are localized to specific systems and processes while traditional integration technologies focus on data movement.

Intelligent process automation gives you the ability to bridge the two approaches delivering end to end automation solutions for the enterprise.

Brookfield's BGRS division who runs the relocation services for hundreds of global organizations was able to use Put It Forward IDA to automate their technical tasks, project management and robotic solutions by bringing them into concert with one another. Part integration, part process automation for an end to end solutions impacting the entire IT organization. This reduces cost, duplication of effort and increases operational efficiency enterprise wide.



This blueprint represents a generic use case scenario for revenue automation

Brookfield | SIRVA | BGRS

- End to End Process Automation
- Global Workforce Mobility Solution Provider
- **75% Cost Time Savings**



How People Use Put It Forward to

Solve End to End Operations and IT Challenges

Because your future sales operational challenges are uncertain

Revenue, operations, and IT leaders need an automation strategy to maximize their data's value. They also need to shorten the time to better quality decisions and operational excellence to handle upcoming changes in the marketplace.

The Put It Forward Intelligent Automation Platform is the superior market offering to unlock your organization's true potential. Beyond creating insights at scale, creating the best possible processes and helping Sales work within a visual interface.

Put It Forward Intelligent Automation Platform offers integrations between hundreds of your solutions, including Microsoft, Oracle, Adobe, SAP, Salesforce, etc.

Hundreds of included integrations



ORACLE®



But don't take our word for it alone.

Some of the best brands and organizations in the world rely on Put It Forward everyday for their mission critical decisions.

“*Put It Forward takes us where no others could - we struggled for years with an enterprise data story - this solved it across the board.*”

Udo Waibel
Sitecore

“

“For me when our internal teams tried to replicate the Put It Forward technology that was when the pin dropped ... these are really smart people.”

Sarika Saoji
Symantec

“

“Having our global teams all working from the same page is critical to our success. Put It Forward exceeded way beyond where others died.”

David Hrynk
Brookfield

“

“You guys showed us what was possible by bringing all the pieces together and making it all work seamlessly. Really truly impressed, thank you.”

Lindsay Drake
OpenTable

Want to deepen your understanding of how you can use Put It Forward IDA for Revenue, Operations and IT to scale better decision making?

Here's a look at some of the top use cases across the enterprise.

Revenue and Marketing

- ✓ Customer 360
- ✓ Predictive Insights
- ✓ Order to Close
- ✓ Fraud Detection
- ✓ Customer Experience

IT

- ✓ Cross Dept Automation
- ✓ RPA
- ✓ Platform Orchestration
- ✓ Integration
- ✓ Data and Process Mining

Operations and Finance

- ✓ Process Automation
- ✓ FP&A
- ✓ Order-to-Cash
- ✓ Procure-to-Pay
- ✓ Risk Analysis

Analytics

- ✓ End User Predictive
- ✓ Data Platform
- ✓ Performance Analytics
- ✓ Customer Insight
- ✓ LTV

Getting Started With Put It Forward

Automating processes and decisions while layering in predictive analytics can be complex on their it doesn't have to be. When you use the Put It Forward Intelligent Decision Automation Platform you're uniting the power of your data and systems with automation directly into the hands of your analysts and directors so they can make better decisions at scale.

Ready to start?

Download the guide from IDC on Put It Forward predictive analytics solution for competitive advantage.

[Download IDC Guidebook](#)

Discover the value of intelligent automation in your organization with our interactive calculators.

[IA ROI Calculator](#)

Learn more about best practices for intelligent automation, methodologies and success patterns.

[Book a Discovery Discussion](#)

