

Getting Ready for the Future of Work: 8 Steps to Better Workflow Automation

The nature of work has changed. No longer are employees necessarily bound by arbitrary rules on when or where they work, and the tools they use. Over the past few years the way we work has evolved in several important areas. All of these are moving in a direction of digital transformation or change. Tech Research Asia's (TRA) workplace research has shown that:

- Across Asia Pacific the most common workstyle is the traditional allocated desk. But on average employees only spend between 30% to 50% of their time at their allocated desk (when they have one). Six in 10 employees use more than two different spaces per day.
- The most common place to work is no longer the enclosed office or cubicle: 65% of workers say they are more productive and want to work while mobile (on or off campus), in an open plan office, or in an activity based working (ABW) environment. Mobility strategies are now common for one in two organisations across Asia Pacific and ABW is being sought after by more than 30% of large organisations.
- We have multiple tools for communication and not just email and the phone. In addition to mobile devices, Australian CIOs are most likely to deploy business social networking, team collaboration tools and AI assistants in 2019. Mobility remains the most important focus in the rest of Asia Pacific.
- We have more remote workers, freelancers, contractors, and outsourced functions than at any time with over one third of organisations using at least one of these types of external workers.
- We are increasingly adopting agile development methods and not just in the IT department that requires teams from disparate departments to come together quickly.
- In mature markets in Asia Pacific over 70% of large organisations use at least one form of cloud computing. 85% of Australian organisations have some applications in a cloud environment and continue to expand their footprint. This provides anywhere, anytime availability to employees.
- One in two technology leaders in mature markets like Australia,



Singapore, Hong Kong and New Zealand say they have already begun a Digital Transformation program and that this is the primary driver for change in the workplace.

- Documents and data are relied on far more heavily. The second highest area Australian CIOs nominate that would improve productivity in the workplace (behind better connectivity) is improved data analysis and information sharing. Across South East Asia the top area for improvement nominated by CIOs is using and analysing data.

- The protection of privacy in the form of personally identifiable information (PII) is now an obligation for organisations in almost all jurisdictions in Asia Pacific. There has been more privacy legislation enacted since 2010 than at any other time in history.

All of these developments in the way we work demand that the information and documents we use to get things done are digitised and automated. They have to be, or we can't work flexibly. But this is one area that many organisations continue to struggle. This report provides a step-by-step guide for executives to follow when digitising and automating their workplaces with a specific focus on document workflows in key areas.

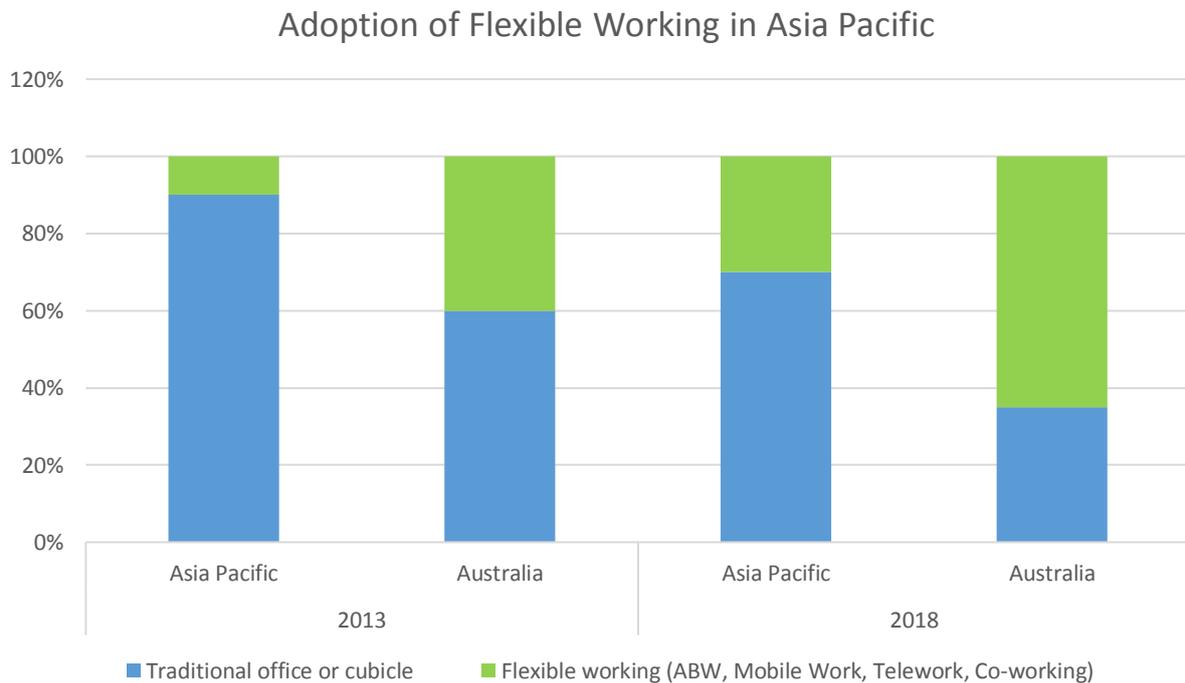
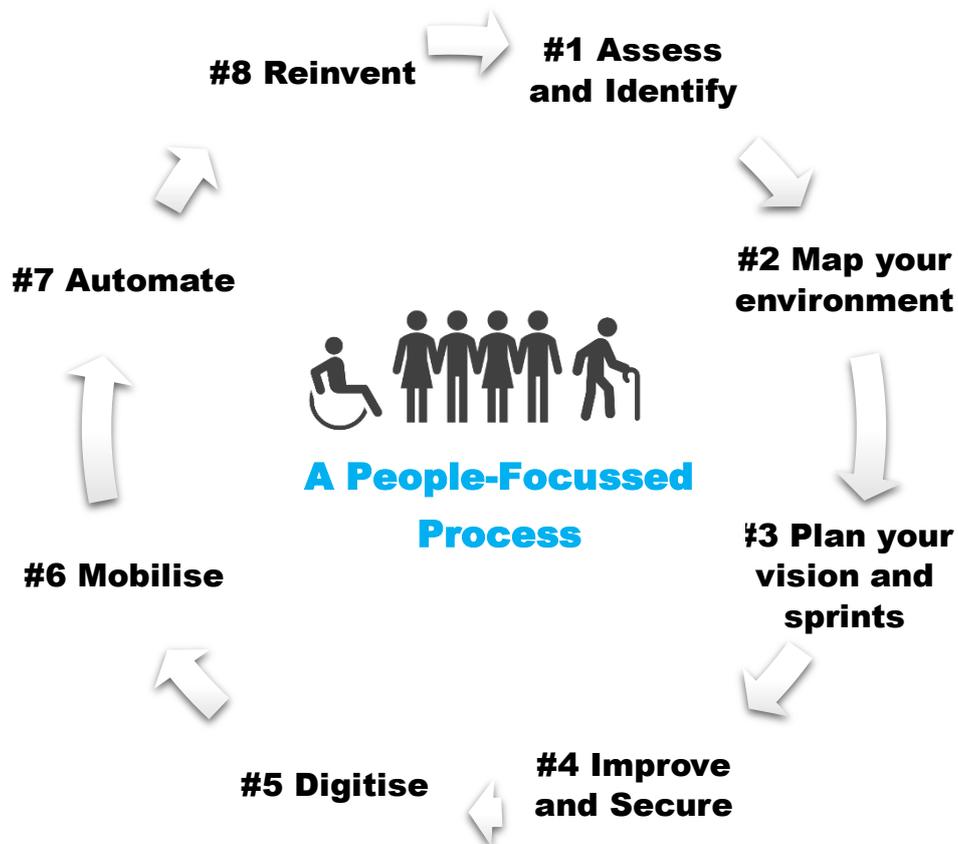


Figure 1. Source: TRA. Note: Asia Pacific data is estimated.

The Step-by-Step Approach to Preparing for Workflow Automation: The Indispensable Eight

To become a truly flexible workplace that adapts to the future of work you need a program of digitisation and workflow automation to be successful. There are many ways to go about this and how you proceed will depend on your starting point and unique circumstances. However, there are several common steps that can and should be taken – all with people (customers and employees) at the centre. Some of these you might do together, and many will have overlapping components. It is up to you to ensure you have an effective approach and are continually improving how you prepare for the way work changes in future. We recommend at minimum undertaking the following eight steps to prepare for the future of work:



The First Step: Assess and Identify

Start here regardless if you don't already have a comprehensive understanding of your business and how it operates in detail or if you think you do. Undertake a detailed assessment of your business and identify the gaps between how it is supposed to operate and how your employees actually do things on a daily basis. Then compare it to your peers or organisations in other industries that are successful. You will need to not only look at financial results but also survey and observe your employees. (Don't just do an occupancy study of the workplace which is commonly done in workplace strategy projects.)

Also watch and document *how* they work, not just where.) Review what you think you know and test your assumptions. The benefit of doing this is to give you a comprehensive understanding of your business that offers insights into how you can improve and achieve advantage vis-à-vis your competition. Things to do as part of this step:

- a. Get a team together to do this work. It can't be just one or two people but should be multi-stakeholder with executives and lower-level employees equally involved.
- b. Engage 3rd parties and leverage their expertise – they can help you understand what other organisations do and have specialists with unique skills.
- c. Look internal and external. What are you doing? What are peers doing well? It is important to look beyond your own sphere to capture insights and ideas.
- d. Talk to your workers and ensure this is frank and honest without any hint of repercussions. Do you understand how they work and where they have gaps with how you need them to work?
- e. Evaluate how you use the spaces available to you. Are you getting full value out of these investments?
- f. Identify your most critical processes and workflows and also those that cause the most headaches. Do you really know what is critical and what isn't?
- g. Do a stock take of your technology and suppliers in the workplace. Knowing how many suppliers you actually have and what is working can significantly help you simplify the environment and reduce costs.
- h. Benchmark yourself against the market but be ambitious. Are you digital ready? Competent? Leading?



The Second Step: Map your environment

Some organisations have already gone through customer journey mapping. Some have business process maps. But very few have a map that spans the customer journey, the employee experience and the workflows (or document / data lifecycles) that connect it all. This is what you need to establish at this step – an integrated dynamic map of the customer experience, the employee experience and the document or data workflows.

Read more:

A Fuji Xerox case study in digitising records with the City of Bunbury in Western Australia.

[Access the case study here.](#)

You may want to engage a third-party specialist to help you achieve this end state. The first task in this step is to check what documentation already exists within the organisation that can help generate your map. For example, often human resources or student or patient administration departments have existing well-documented processes that must be followed. Such as onboarding processes for new staff, students or patients. Are these digital or captured on paper? Finance departments will have billing and payroll processes documented separately and will also require new people to fill in documents. There will be many other parts to the journey you will need to map out and this will take time. It will also require you to break down any processes or information that is siloed into departments and not shared across the organisation.

In the same way that many organisations are striving for a “single source of truth” with customer data, your goal is to bring all of the steps in the employee journey(s) together into one detailed digital map that can dynamically show everything. From how an individual employee experiences your organisation and the frustration points, to how the role of documents and data intersect with these experiences. Without this you will be guessing when making decisions on which workflows to digitise, automate or improve. This process may also allow you to correlate what you see in your customer journey maps with the performance of your employees and understand why this is happening.



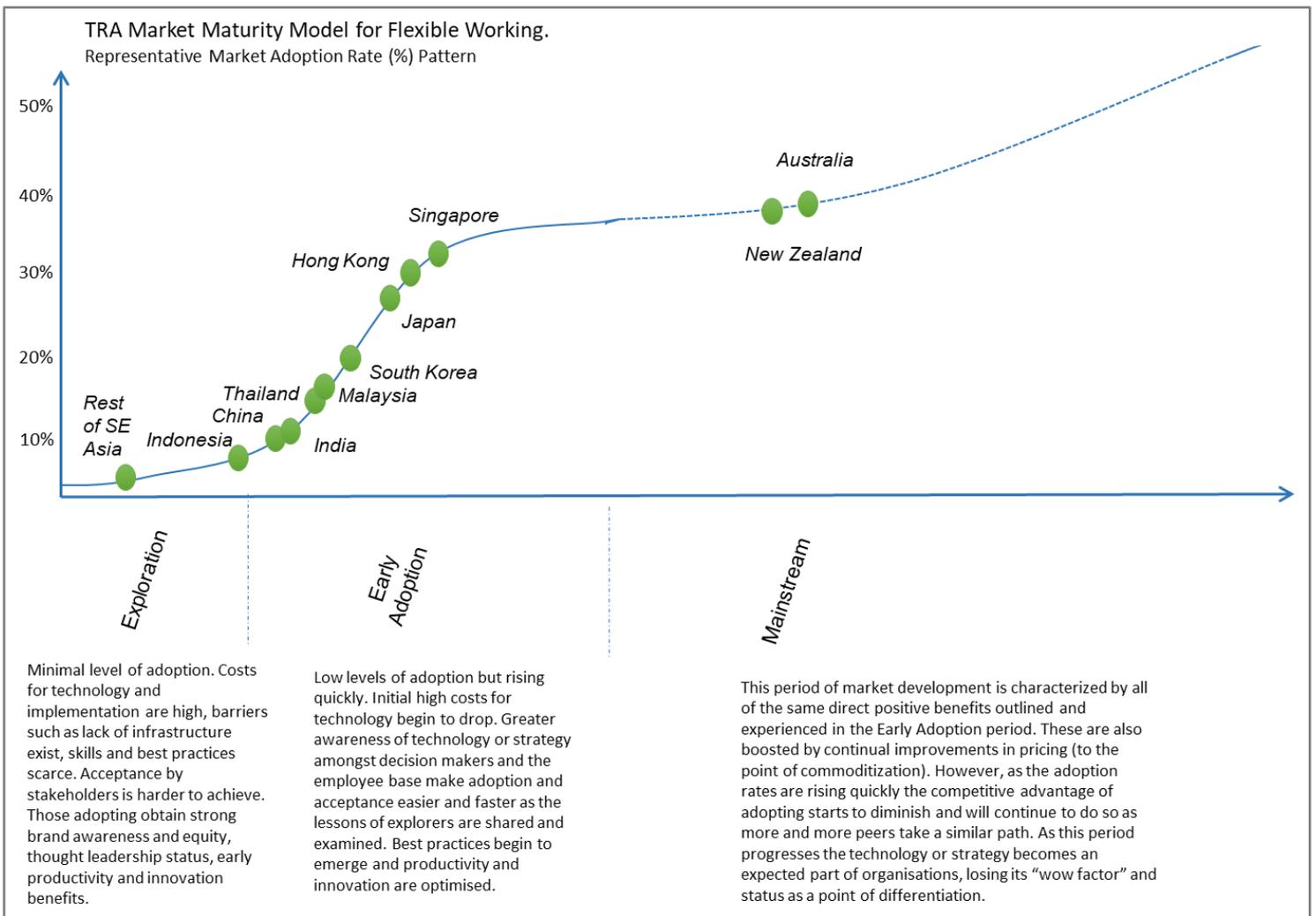
The Third Step: Plan your vision and your workflow automation sprints

If you have invested the time and energy into properly executing steps one and two above you should now have a highly detailed understanding and map of your organisation that can inform the way you want to work in future and the workflows that you’ll digitise and automate to get there. In this step you need to create a future of work vision and supporting strategy that embraces flexibility and agility in the way it is implemented. The strategy and goals of this vision should be broken up into manageable “sprints” the same as an agile software development approach with a regular cadence of completion. Workflows should be allocated by importance with some “low hanging fruit” workflows nominated for the first sprints but harder to digitise and automate workflows not ignored. Share a blueprint of what you plan to do.

For example, organisations that have regular site visitors – such as those in construction, factories, healthcare, primary industries, etc – may want to look at areas like e-forms for registration as this can help with compliance and reduces manual data entry into systems of record. Other examples include digitising and automating employee expense claims. The workflows you choose first will be unique to your organisation, but the aim is to make an immediate impact.

Other things to do as part of this step:

- a. Plan and pursue a strong program of stakeholder management and engagement. This is, after all, going to be a program of work that changes culture and the way people work on a daily basis. You need excellent change management.
- b. Implement daily scrums and ensure organisation-wide visibility of kanbans (signboards) that show your progress.
- c. Create shared goals and responsibilities for ensuring that sprint goals are achieved. This shouldn’t be a top-down directed program of work. It needs grass-roots support.
- d. Offer detailed and real time feedback mechanisms for employees to gauge their sentiment and whether what you are doing is working or not.
- e. Follow the minimum viable product (MVP) thinking and iterate.



Fourth Step: Improve and Secure

A bad workflow will still be a bad workflow when digital or automated. And most organisations will now have greater privacy and security requirements than when things were predominantly manual or paper-based. The premise of this step is to make you evaluate and improve the first workflows you plan to digitise and automate before you do anything to this end. For example, a common frustration for any sales person or consultant that is responding to a request for tender or quotation (for instance in professional services or graphic design) is waiting for approvals before replying. This can have a negative impact on the chances for a successful bid, especially if the wait is too long. If they still need to wait once things are digitised, the process remains flawed.

If you undertook the second step (mapping your environment) you should already have a strong understanding of the workflows you are addressing in your sprints. You should also be able to see where it might need improvements or alignment with security goals. Get your security and privacy people involved first and ask them what best practice is and how to strengthen the workflow. Also get

the people directly participating in the workflow involved – they can often tell you what works and doesn't, and this isn't always written down. Then adjust the design of your workflow and document it in your overall map before moving to the next step.

Other things to do in this step:

- a. Focus on optimising the workflow and eliminating waste
- b. Get security and privacy officers involved at the start and all the way through your design.
- c. Try to integrate and simplify the workflow with other adjacent workflows.
- d. Reduce costs or add value. Don't just make changes for change sake.
- e. Remember to focus on the customer experience *and* employee experience



The Fifth Step: Digitise

Once the workflow is understood and optimised as per the above step, move into end to end digitisation. You won't be able to do everything at once and will need to consider the impact on upstream and downstream parts of the same workflow along with associated workflows. Also, don't forget that many of your employees will still need or want to print documents out. For example, some architects and engineers require hard copy plans of their designs or even 3D printing on-site. In legal services paper documentation of contracts is still common and required. Many educators use hard copy versions of course materials. Ensuring there is a way to seamlessly move from hardcopy to digital with strong version and editing control is critical in these situations (as with others).

Break the digitisation process up into manageable parts and work with those involved in the workflow on a daily basis. It is worth engaging a specialist in this field to help as they can advise on the overall technology architecture and provide skilled people to do the actual implementation. Make sure you have a simple and agreed on taxonomy of the tags you will use for documents and data.

Other things to do in this step:

- a. Always digitise with security by design. Make sure you can track and protect sensitive information/data
- b. Consider digitising with a cloud-enabled architecture to be available anywhere at anytime.
- c. Digitise so the information is easily searchable and usable with a friendly and accessible user design that plans for conversational interfaces.
- d. Consider your compliance and governance requirements.
- e. Build your archival plans into the process from the start – not as an afterthought.
- f. Digitise with the view that the workflow might change as the business changes.



The Sixth Step: Mobilise

Mobilising your workflow can of course be done in conjunction with the digitise step above, but it deserves special attention. The question you need to ask and answer is can employees be involved in the workflow from anywhere on any device? Can they use paper documentation where and how they need if necessary? Many organisations' digitisation efforts cease once things are turned into electronic format. But that doesn't mean it is mobile friendly or mobile first, which it should be. In this step you need to check that the workflow is truly mobile first. Test the workflow on different devices, in different places (on campus, off campus, while travelling, etc), under different connectivity circumstances (online, offline, etc) and with various stakeholders. Note if there are any differences in the experience and what the implications might be. Then address any shortcomings.

For example, many field or plant workers that need to record information such as meter readings, test results, or take photos or record descriptions often do so on paper, in spreadsheets or stand alone applications when not connected. By ensuring they have access to an integrated and centralised system which they can use when offline (and then it automatically updates when connected) can improve the quality of information captured, and the ability of the individual and organisation to use it for analytics or action.

Other things to do in this step:

- a. Make sure the workers are embracing the anytime, anyplace workflow and not reverting to old ways of doing things.
- b. Consider if employees can print securely where needed.

Read more:

European Motor Distributors (EMD) is a subsidiary of Giltrap Group Holdings, a large automotive group in New Zealand. Watch this video to find out how Fuji Xerox and Esker successfully transformed a paper-driven Accounts Payable process to one that is automated and drives the right outcome for the EMD business [Access the case study here.](#)



The Seventh Step: Automate

This step is essential to ensure you make the most out of any digital transformation project. The digital era has made information more available and accessible. But it has also made us busier. Much busier. The volume and variety of data coupled with contemporary business demands, has not always made the employee experience better or more productive. This automation step is about ensuring employees and customers can skip any unnecessary manual interventions and make their lives easier. Remember, because something is digital and mobile doesn't always mean it is necessarily helping. But removing roadblocks and enabling "smarts" can help.

For example, every organisation invoices their customers and partners and receives invoices from others. Being able to automatically populate a new invoice with the correct information before sending and to accurately capture the and route information from received invoices can save considerable amounts of time and labour costs. Another example where automation helps is in ensuring that the right document templates are used across the organisation when engaging customers with content or communications, saving time and ensuring brand consistency.

Things to consider as part of this step:

- a. Look to smart data entry and forms. Your provider should help with natural language generation tools and machine learning for predicting text or data entry or capture.
- b. Understand the role that robot process automation can play in future for you.
- c. Make sure you are planning for ongoing improvements not just taking a set and forget mentality.
- d. Be ready for what automation does to your people and roles, especially if it means you reduce headcount.



Step Eight: Reinvent

Work changes. It always has and always will. So will the demands on your organisation and the workflows it uses to do what it does. This step is about making sure you continue to reinvent and innovate. You will need to establish a mechanism for doing this by giving responsibility to a team of people to go and discover what is happening in other industries and with emerging technologies. Consider running ideation workshops and hackathons to capture ideas and innovate. This process should take you back to your first step in this indispensable eight steps. Consider also as you do this:

- e. Emerging technology and those bringing it to market are evolving rapidly. Six months is a long time in technology so make sure your reinvention mechanism is triggered frequently.
- f. Take the time to reassess and re-evaluate how well things are performing. It is easy to get caught up in the quarterly pressures of business or the minutiae of a project. Step back and make sure you are on the right tack or change course.

Conclusion

The way we work will continue to change. It will be more digital and optimising and automating your workflows will be a key pillar of workplace success. Your journey will be unique but use this guide as a starting point to prepare for the future of work.

The Fuji Xerox View

Fuji Xerox is already working with customers to optimise, integrate, and automate their workplaces. We are increasingly introducing digital solutions including document management and business process automation. Our flexible contracts extend beyond managed print services into areas including facilities management where customers pay for use of services in a utility model driven by the flexible work environment they offer to their teams. If you or any of your team would like help in designing and managing your future workplace, [Contact us now.](#)

“Getting Ready for the Future of Work: 8 Steps to Better Workflow Automation” was commissioned by Fuji Xerox Asia Pacific. For more information on how Fuji Xerox can help your business to get ready and stay ready for the future, please visit www.fujixerox.com.my

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<http://www.fujixerox.com/>

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