

# New Approach to Process Management and Automation

MARK ODENDAAL  
NINTEX

THE FUTURE OF INTELLIGENT AUTOMATION



# Speaker Introduction

- Regional Senior Account Executive
- Responsible for 90% of local client base at Nintex.
- Experience: 18 years+ in sales/client management roles
- Focused on infrastructure, carrier and application centric solutions across multiple vendors.



MARK ODENDAAL  
NINTEX



# Trusted Provider of Process Intelligence and Automation

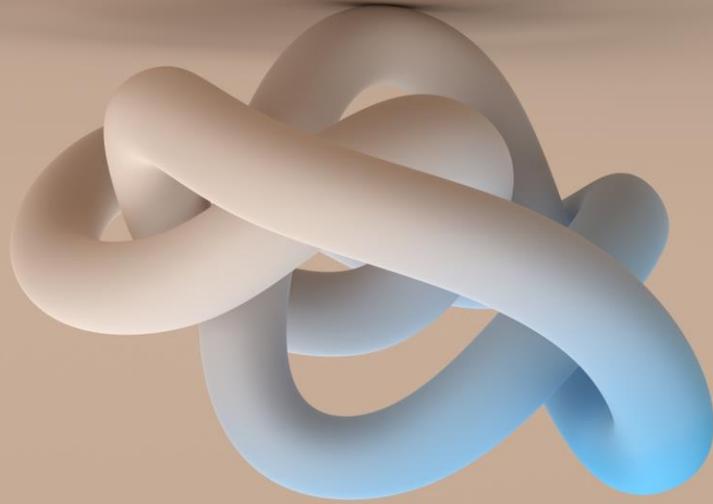
Enabling people and organizations to focus on the things that really matter





# Agenda

- 1 | Nintex Introductions
- 2 | Current Landscape
- 3 | The Nintex Process Platform
- 4 | Customer Use Cases & Demo
- 5 | Q&A with Next Steps



**Unprecedented  
times** impacting  
digital transformation  
initiatives

**84% of CIOs** are focused on efficiency and/or savings costs as their primary focus areas

**55% of C-suite leaders** say their org's business needs outpace their ability to automate

**70%** of enterprise organizations have **less than 20%** of their overall processes automated



# Process improvement is key to digital transformation success

Digital transformation leaders see  
**5x revenue growth**  
compared to laggards

Successful organizations target  
**2.1x more business processes**  
for digital transformation than others

**57% of medium to large  
organizations** already have process  
automation deployments underway

# Nintex helps organizations transform the way they operate

## TRUSTED EXPERTS

With over 15 years of focus on optimizing processes, we've earned the respect of our customers, industry experts, and partners.

## MOST POWERFUL END-TO-END

Nintex gives you everything you need to tackle sophisticated-to-complex automation challenges with ease.

## BEST VALUE IN THE MARKET

It's easy to get started and with transparent pricing and scalable technology you achieve quick time-to-value and long-term ROI.

## UNPARALLELED EXPERIENCE

We deliver exceptional customer and partner experiences through our software, our people, and our community.

And deliver **BUSINESS IMPACT** up to

**213%**  
3-year ROI

**75%**  
Productivity improvement

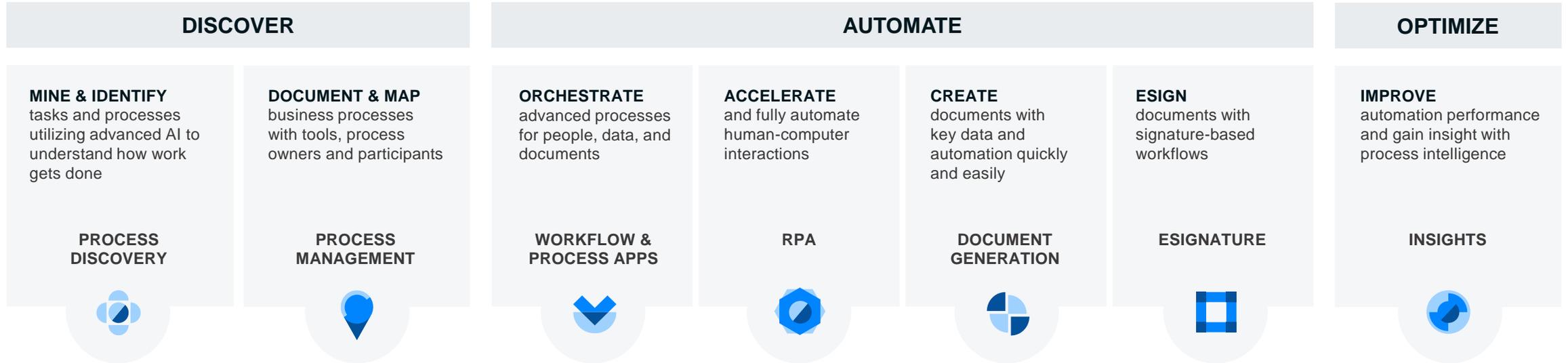
**25%**  
Cost reduction

**50%**  
Risk reduction



# Process Platform: Grow with the Needs of Your Business

Easy-to-Use. Powerful. Complete.



## Shared Platform Components

Analytics | User Management | Security | Governance

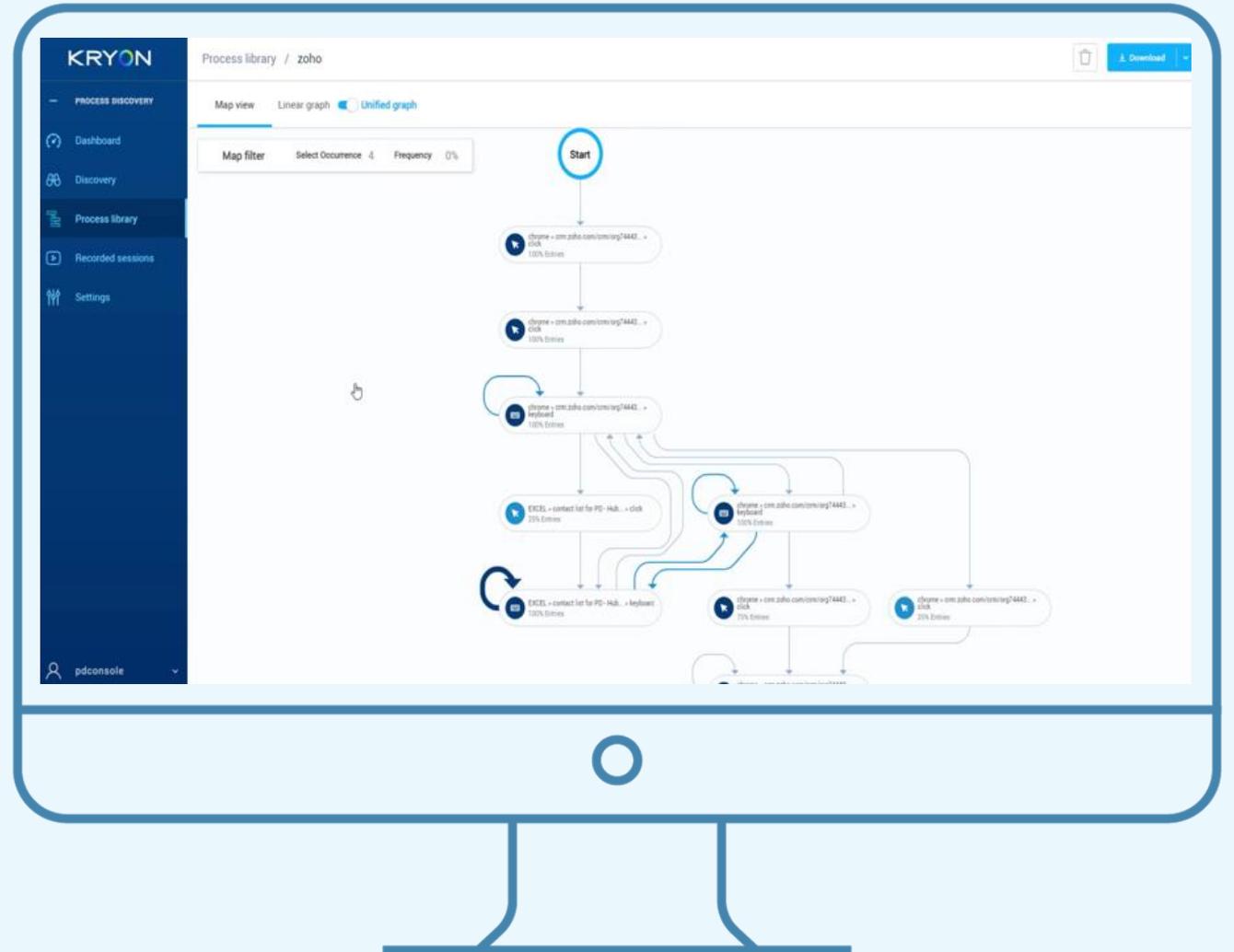
Xtensions | System Orchestration | Connections & APIs | Template Gallery



# Discover. Process Discovery

Automatically capture user activities to rapidly optimize processes and uncover automation opportunities

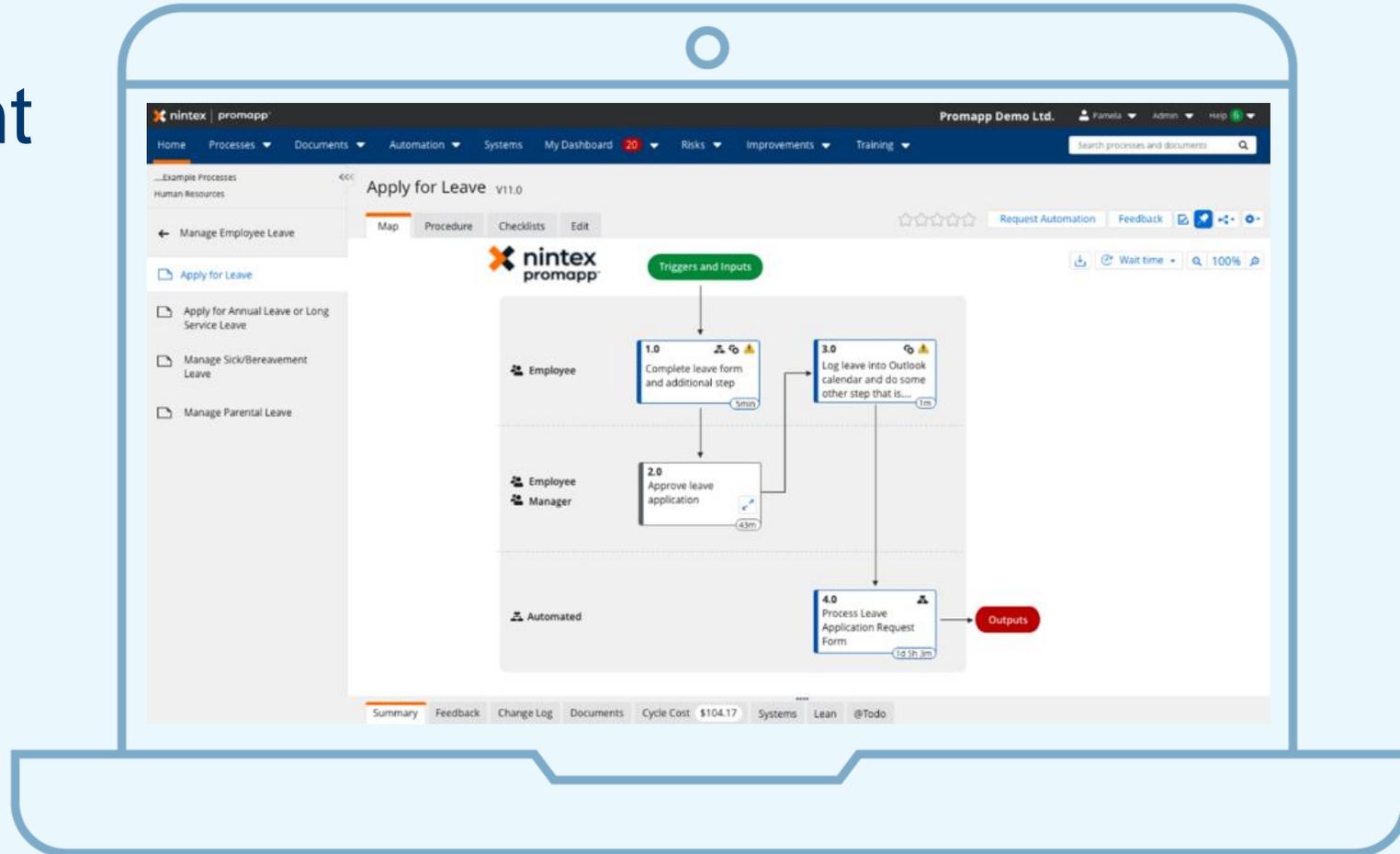
- Easily discover what actions users are taking and ensure they traverse the most efficient path
- Maximize workforce productivity and enhance corporate procedures by uncovering bottlenecks and hidden capacity
- Get AI-based recommendations to understand which processes will produce the highest automation efficiencies
- Seamlessly produce Nintex RPA flows to automate prioritized processes



# Discover. Process Management

Powerful business process management for total visibility and control of your processes

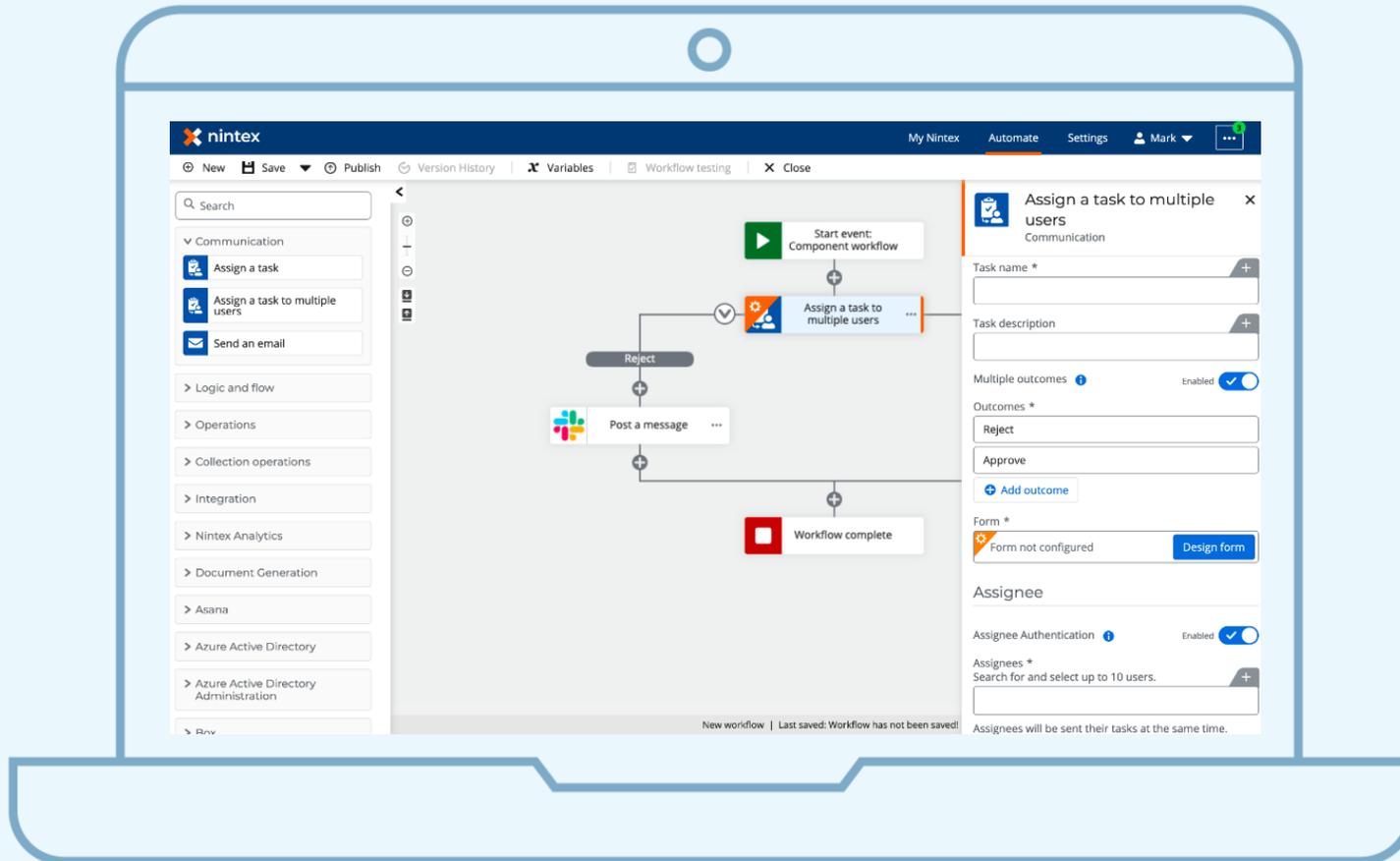
- Turn complex process maps and procedure documents into clean, simple, and accessible process maps
- Drive company-wide collaboration, accountability, and process improvement
- Share updates and receive feedback in real-time with collaboration tools
- Easily identify opportunities for automation across your business processes



# Automate. Workflow

Powerful and easy-to-use workflow automation to streamline the processes that make up the core of your business

- Intuitive, drag-and-drop visual design canvas with no coding required
- Quickly deploy automated workflows across business
- Connect to your existing business systems (Salesforce, Google, Microsoft, Legacy on-prem, and more)
- End-to-end automation, integrating process mapping, document generation, RPA and e-signature capability within workflow
- Fast time-to-value; lowest total cost of ownership



# Automate. Process Apps

Create dynamic online forms to capture and submit accurate and current data from wherever you are, on any device

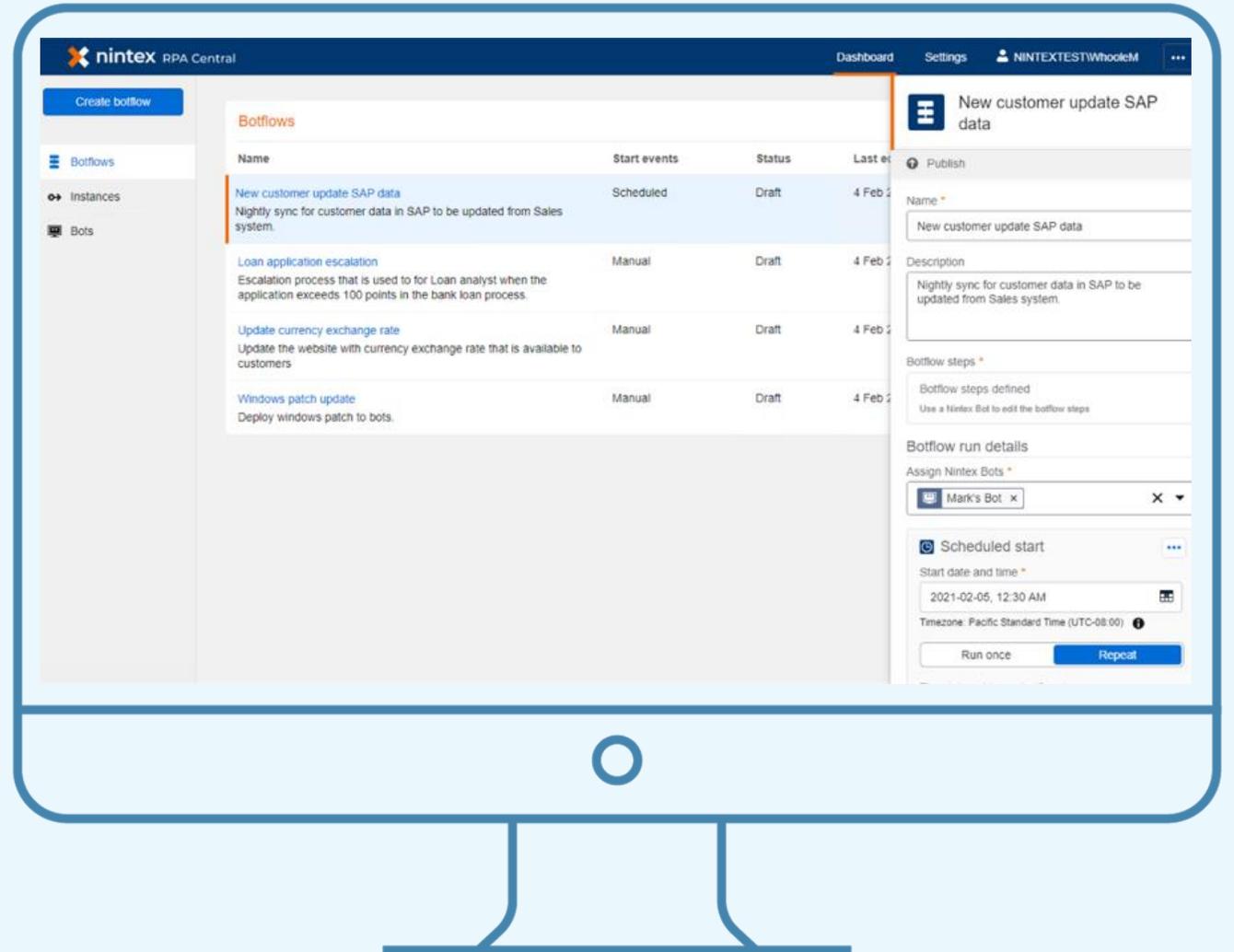
- Quickly and easily build and customize your form with no coding required
- Submit a form where you are, on any device, so data is always collected
- Enable authentication option to improve governance and usage of your form
- Leverage rules and formula-builder to further customize your form

The screenshot displays the Nintex Automate Designer interface. The top navigation bar includes 'My Nintex', 'Automate', 'Settings', and a user profile 'Mark'. Below this is a secondary navigation bar with 'Designer', 'Preview', 'Styles', 'Rules', 'Variables', and 'Settings'. A search bar is located on the left side of the main workspace. The central workspace shows a form design with several input fields: 'First name \*', 'Last name \*', 'Address 1 \*', 'Address 2 (Optional)', 'City', 'Postcode', 'Appointment date \*', and 'Supporting documentation'. A 'State' data lookup widget is integrated into the 'City' field. The right-hand panel, titled 'State Data lookup', contains configuration options for the widget, including 'Title' (set to 'State'), 'Name \*' (set to 'State'), a 'Customize' toggle (set to 'No'), and 'Option configuration' fields for 'Option label', 'Option value', 'Required' (set to 'No'), and 'Visible'. A 'Data source configuration' section prompts the user to 'Select a data source to use as input'. At the bottom of the workspace, there is a 'Drag files here or Select files' button. The status bar at the very bottom indicates 'Design form' and provides save status information.

# Automate. RPA

Quickly and cost-effectively automate routine, manual tasks without the use of code in an easy-to-use, yet powerful drag-and-drop interface

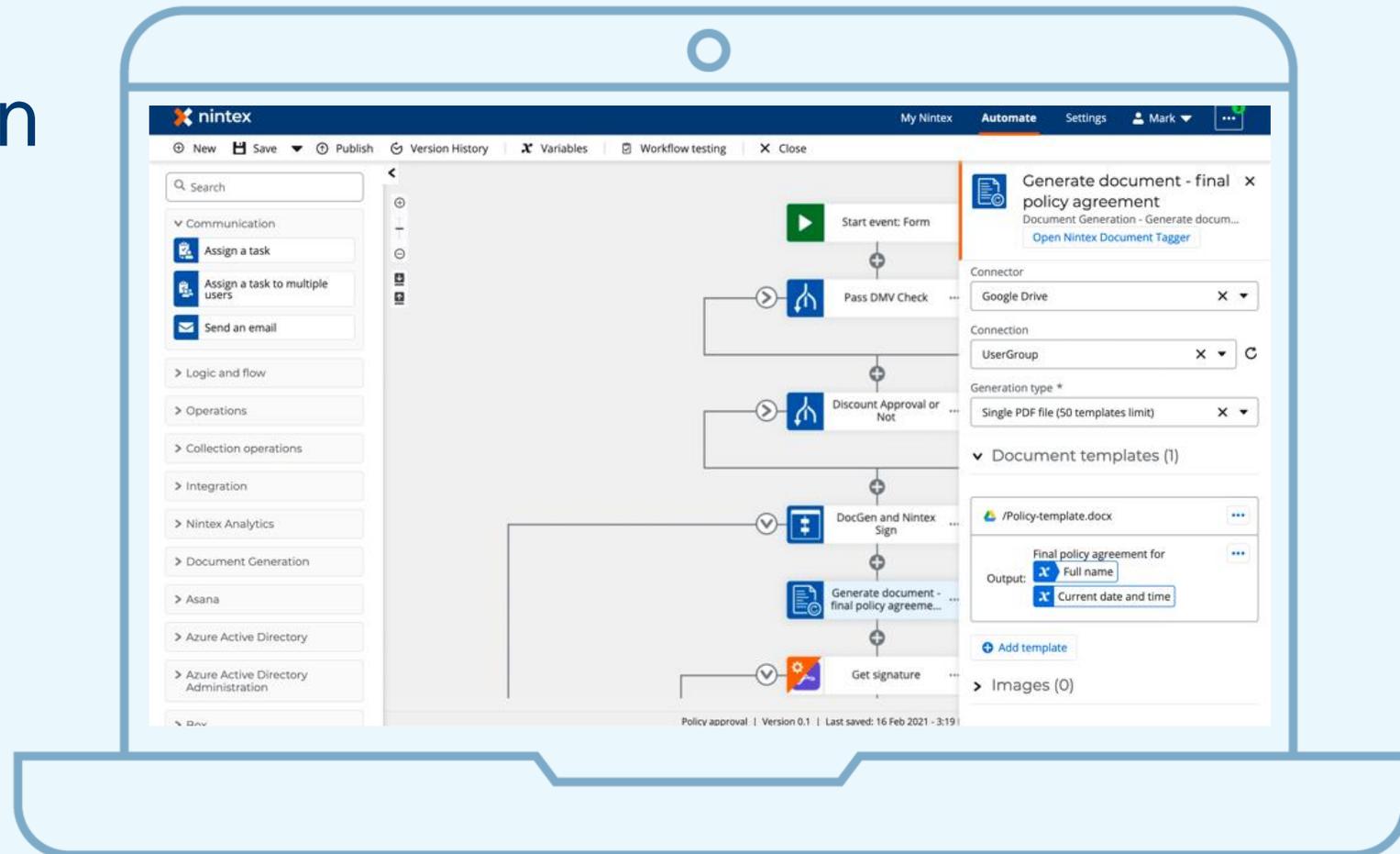
- Easy-to-use, yet powerful and accessible to even non-technical users
- Unlimited speed with no additional cost for additional bots
- Get tasks automated in hours & days
- Centrally coordinate bots in an intuitive environment
- Low total cost of ownership



# Automate. Document Generation

Leverage all of your data to effortlessly create documents that drive business results

- Trigger data-driven documents on demand or via a schedule
- Activate data from CRM or systems of record without cutting and pasting
- Improve compliance with approved templates
- Deliver Word, PowerPoint, Excel, and PDF docs via efficient channels



# Automate. eSignature

Powerful, accessible, secure electronic signatures

## Fastest time to sign

Execute agreements and close deals 98% faster with eSign via text.

## Compliant and secure

Meets and exceeds global security and privacy standards.

## Powerful integrations and APIs

Easily connects to systems of record like Salesforce, Dynamics, G-Suite, and more.

## Personalized branding

Provide a seamless, recognizable customer signing experience.

 nintex AssureSign

What would you like to do?

SEND ENVELOP (SIMPLE SETUP)

VIEW TEMPLATES (SIMPLE SETUP)

VIEW REPORTS

MANAGE USERS

CONFIGURE SETTINGS

VIEW MY ACCOUNT

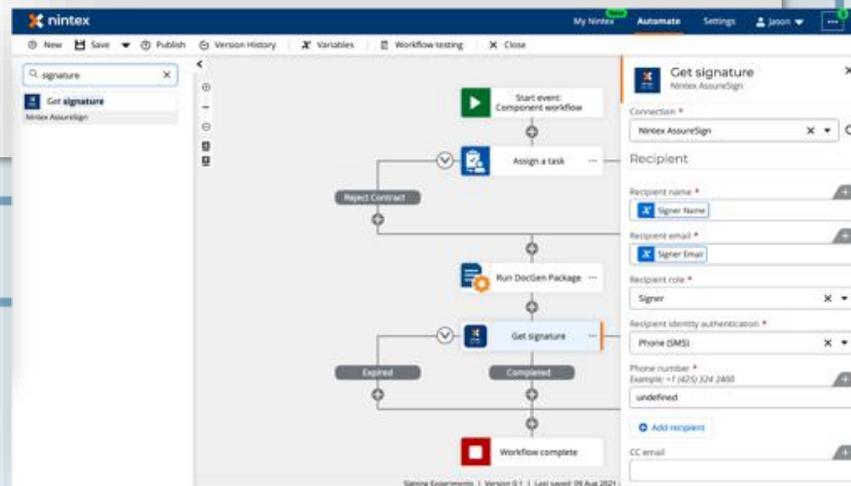
### My important activity

Documents expiring in the next 24 hours: 5

Documents requiring my signature: 1

### My activity

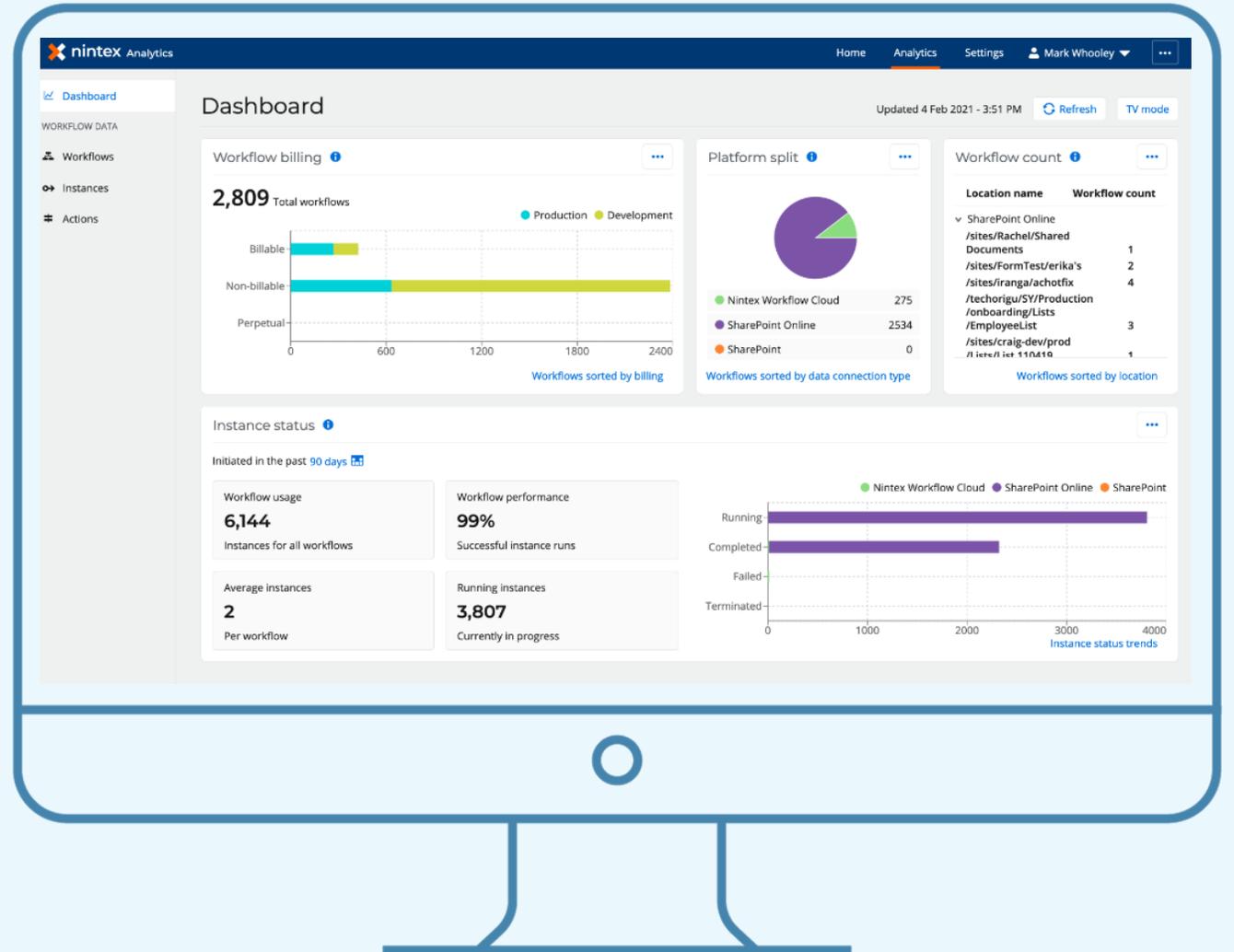
	Total	Last 31 days
Documents started	125	7
Documents completed	101	5
Documents declined	2	1
Documents cancelled	4	0
Documents expired	8	1



# Optimize. Analytics

Explore your data and find actionable insights with Nintex Analytics process intelligence to monitor workflow performance and optimize your processes

- Understand how your processes perform and measure their efficiency
- Discover actionable insights and optimize your processes
- Identify bottlenecks within your processes
- Calculate return of your automation investment



# Common Use Cases

## Citizen Services

- Report Approval
- Purchase Request
- Work Permit
- License Creation
- Program Management
- Constituent Outreach

## Order-to-Cash

- Create Sales Order
- Order processing
- Invoice Generation
- Invoice Processing
- Receivables GL Posting
- Cash Reconciliation

## Service & Support

- Password Reset
- Account Detail Mgmt.
- Customer Service Guidance
- Order/Shipping Status
- Support & Dev. Request

## Document & Contract Creation

- Contract Request & Approval
- Contract Revision
- Document Signature Flow
- Contract Redlining

## Employee Hire-to-Retire

- Recruitment
- Background Check
- Hardware Provisioning
- Application Setup
- Introductory Events
- Knowledge Capture

## CRM Lead-to-Order

- Account Update
- Account Onboarding
- Order Renewals
- Contact Update
- Event Feedback

## Case Management

- Incident Management
- Support ticketing
- New Matter Intake *(legal)*
- Patient Intake *(healthcare)*
- Social work assessment *(public sector)*

## Risk & Regulatory Compliance

- Regulatory Reporting
- Health & Safety Awareness
- Business Continuity Planning
- Change & Release Mgmt
- Media Release

## Claims Processing

- Claims Onboarding
- Damage Assessment
- Partner/Contractor Mgmt
- Payment Approval & Distribution
- Rate Alteration

# Our Customers



Wyndham Hotels is the largest hotel franchise company in the world. After acquiring La Quinta, Wyndham needed to rapidly onboard 900 hotels and train those hotel employees on company-wide procedures, policies, and computer systems.

Wyndham used Nintex Process Discovery to streamline the onboarding of the La Quinta Hotels and to optimize the Wyndham's processes more generally.

- **900 hotels onboarded ahead of schedule**
- **Saved more than 674 work hours**
- **Avoided hiring 500 temporary employees**



**Zoom Video Communications** provides cloud-based video and web conferencing to bring teams together to get more done in a frictionless environment. The company needed to scale its channel order processing to meet booming demand during the COVID-19 crisis.

Zoom replaced its largely manual order tracking and management process with a solution built on **Nintex Automation Cloud** that integrates with Zendesk and Salesforce to automate the steps from order intake through purchase-order confirmation and provisioning.

- **Supported 5x increase in channel business**
- **Reduced contract staff by 33%**



**Roche** is one of the world's largest biotech companies and a leading provider of in-vitro diagnostics and a global supplier of transformative innovative solutions across major disease areas. The company was experiencing rapid growth and needed to digitize processes to improve overall visibility and efficiency

With **Nintex Advanced Workflow**, Roche built applications for everything from simple processes, like travel requests and training approvals, to complex, long-running ones, like its 60,000 requests per year for goods delivery.

- **Improved efficiency around daily operations**
- **Reduced turnarounds from days to hours**
- **Gained traceability with end-to-end process oversight**



ROI  
213%



BENEFITS PV  
\$10.28M

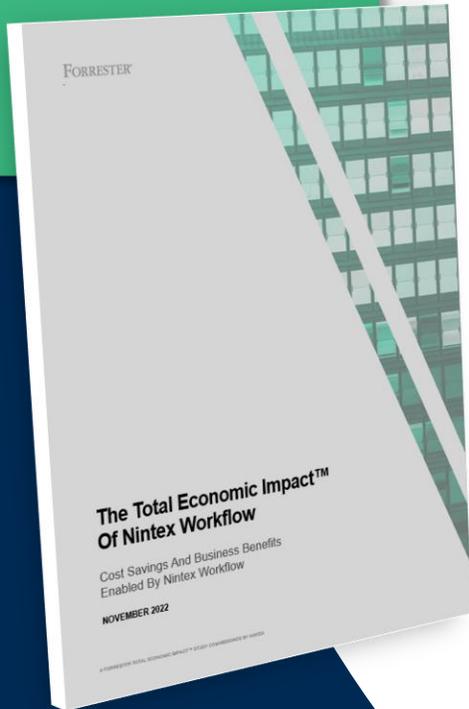


NPV  
\$6.99M



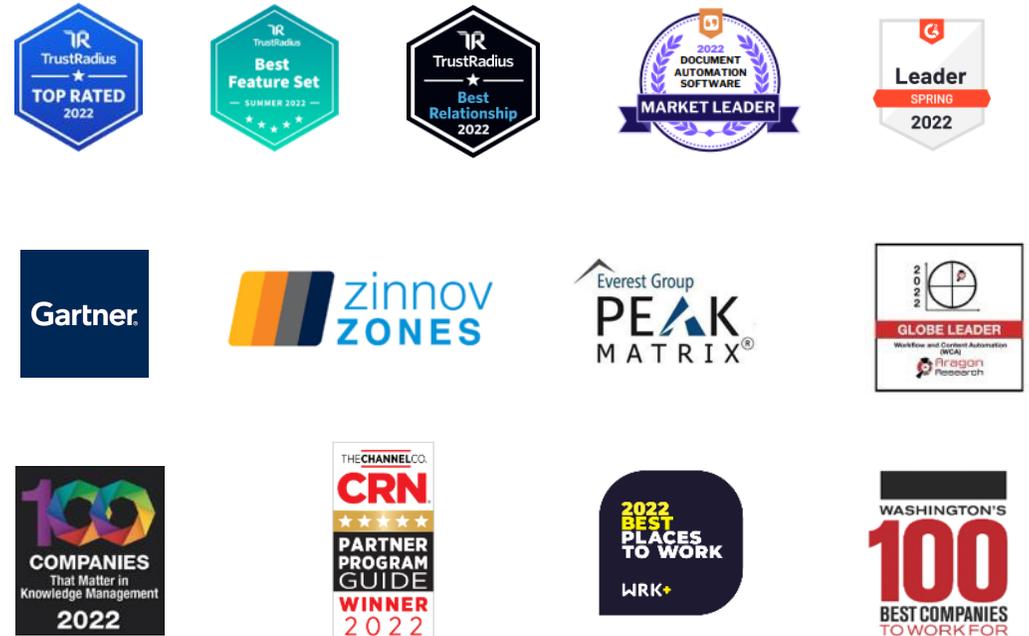
PAYBACK  
9 months

Benefits (Three-Year)



Nintex delivers **213% return on investment** by delivering cost savings, productivity gains and risk reduction

RECENT INDUSTRY RECOGNITION



# Committed to your success

Nintex is passionate about helping you achieve your digital transformation goals, so we offer several resources to help you throughout your Nintex journey.

## **SOLUTION GALLERY**

The Nintex Solution Accelerator Gallery provides a library of curated, pre-built templates and accelerators to get you started quickly and to provide inspiration for new automation projects.

## **SUPPORT & COMMUNITY**

Get help when you need it through our self-service portal or from our dedicated support team.

Collaborate with the global Nintex community and connect with partners, customers and Nintex staff through the Nintex Community site.

## **TRAINING**

Nintex University empowers you to expand your knowledge of the Nintex Process Platform through on-demand training, live instructor-led classes, and certifications.

## **IMPLEMENTATION SERVICES**

The Nintex Professional Services team and our global network of Partners are here to help you with your automation needs so you can get the most out of your Nintex investment.

# Serving 10,000+ Customers

50%+ of the Fortune 500 have standardized on Nintex with 100s/1000s of process apps per company

## TECHNOLOGY



## MANUFACTURING



## GOVERNMENT



## FINANCIAL SERVICES



## RETAIL & CPG



## SERVICES



## HEALTHCARE



## ENERGY



## ENTERTAINMENT & MEDIA





**Thank you**





# Appendix: Product Slides

# Automate. Document Generation for Salesforce

Equip teams to focus on core tasks instead of manually creating sales and mission-critical documents

- Automate data-driven document creation directly within Salesforce
- Activate CRM and other data without cutting and pasting
- Trigger data-driven documents on demand or via a schedule
- Improve compliance with approved templates
- Extend the value of Salesforce - Any Document, Any Data, Any Delivery

The image is a composite of three screenshots. The top screenshot shows a Salesforce account page for 'Jane Smith' with fields for Website, Account Name, Account Site, and Industry. The middle screenshot is a circular callout showing the Nintex DocGen configuration menu with options: DocGen Package, Contact, Document Selection, and Delivery Option (with a sub-option for Email). The bottom screenshot is a product page for 'Nintex Drawloop DocGen' on the AppExchange, featuring a 4.9 star rating, 325 reviews, and a 'Get It Now' button.

# Appendix: Case Study Slides



# Auswide Bank

## Project Management Efforts

### PROFILE

For over 50 years, Auswide Bank has been helping Australians achieve home ownership, create wealth, and access banking and financial services.

### BUSINESS SITUATION

Auswide Bank had no standardized or centralized approach to documenting and storing its business processes. Existing procedures were word documents saved as PDF to SharePoint, in multiple versions that were difficult to find. Processes were not end-to-end with separate system manuals. The approach meant that there was no ownership of processes and an overall lack of confidence in our document processes.

### SOLUTION

Auswide Bank invested in Nintex Promapp® which has enabled the organization to document all its procedures in simple concise words and process maps. Now, Auswide Bank's process are mapped end-to-end in a standardized process format with controlled variations. There is clear process ownership with an "owner" and "expert" plainly visible.

**720 published processes** with 55,000 views and climbing

**Improved risk culture** across the organization

**Collaboration** across different business units in the bank





# LinkedIn

## PROFILE

LinkedIn connects the world's professionals to make them more productive and successful. With 675+ million members worldwide, including executives from every Fortune 500 company, LinkedIn is the world's largest professional network.

## BUSINESS SITUATION

LinkedIn's sales organization struggled with complex and manual quoting and contract processes, with contracts stored on individual seller's device they also presented an unnecessary data risk. The organization needed to streamline its quoting and contract process, while ensuring data compliance, to make its seller more productive.

## SOLUTION

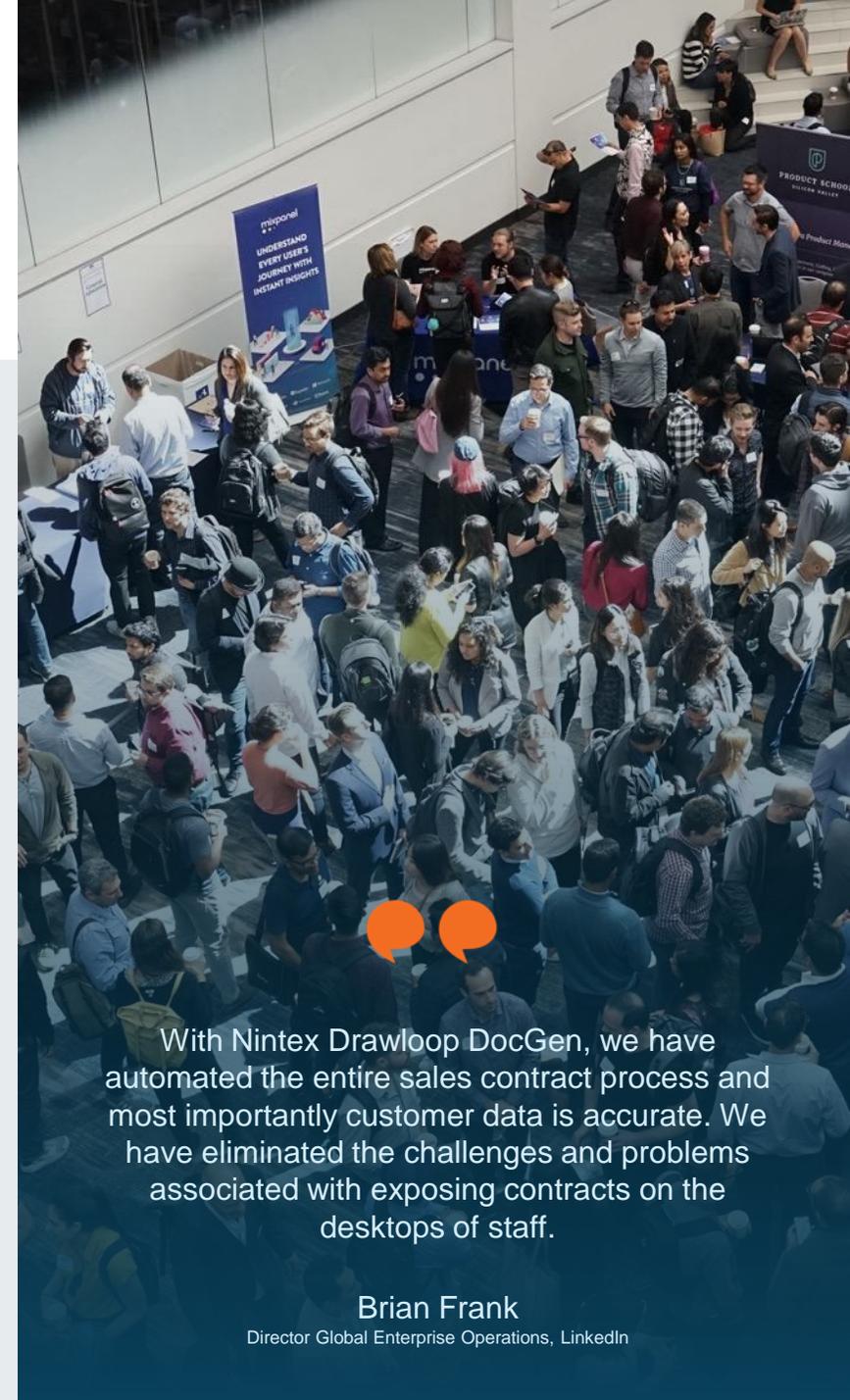
Using Nintex Drawloop DocGen® for Salesforce and Salesforce Sales Cloud, LinkedIn transformed their contracting processes and improved compliance. LinkedIn's sales team is now generating thousands of documents weekly, improving proposal turnaround by 50%.

**50% reduction** in proposal turnaround

**1000+ documents** generated weekly

**Improves and ensures** data compliance

Source: Nintex Case Study



With Nintex Drawloop DocGen, we have automated the entire sales contract process and most importantly customer data is accurate. We have eliminated the challenges and problems associated with exposing contracts on the desktops of staff.

**Brian Frank**

Director Global Enterprise Operations, LinkedIn





# Standard Bank & Trust Co.

## PROFILE

Established in 1947, Standard Bank & Trust Co. is a \$2.2 billion bank with 37 branches throughout Illinois and Northwest Indiana. The Chicago-based organization believes in helping to build up local communities through volunteer work, partnerships with schools, local hiring, and more.

## BUSINESS SITUATION

Standard Bank needed to automate manually intensive tasks such as reassigning mass amounts of customers to employees, automatically closing dormant credit cards, and more efficiently identifying customer account portfolios.

## SOLUTION

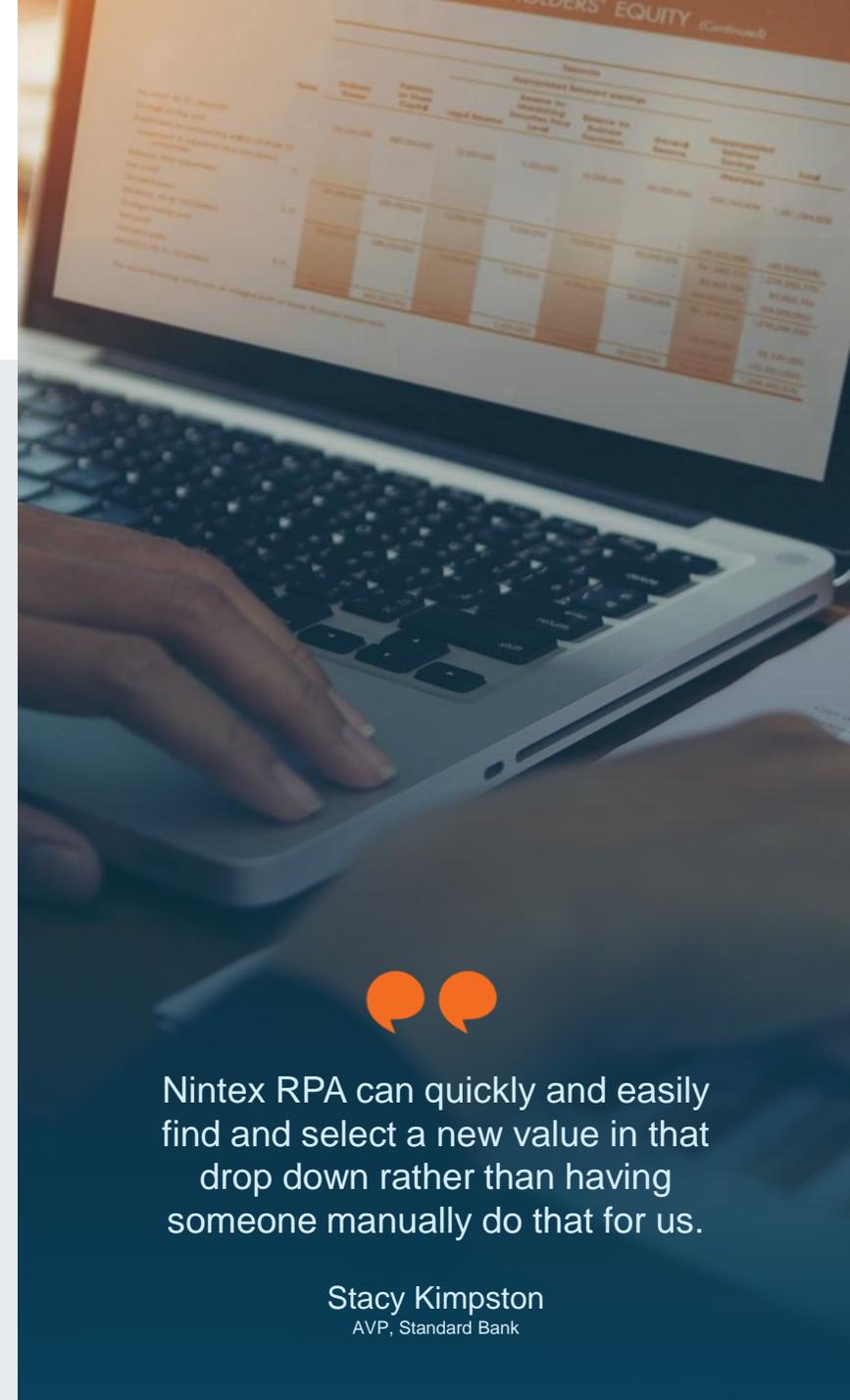
Using Nintex RPA, Standard Bank was able to add flex fields and household numbers common to accounts, making it easier to mass-migrate them to other employees. Standard Bank was also able to automatically locate dormant cards and close them.

**Eliminates errors**  
from manual updates

**Saves nearly 150**  
employee-hours a year

**Bank saves significant time and money** by automating tedious manual processes

Source: Nintex case study



Nintex RPA can quickly and easily find and select a new value in that drop down rather than having someone manually do that for us.

Stacy Kimpston  
AVP, Standard Bank



# Jacksonville Jaguars

## PROFILE

The Jacksonville Jaguars are a Florida-based professional football franchise and members of the American Football Conference (AFC) of the National Football League (NFL). The Jaguars proudly represent Jacksonville, Florida, America's 11th largest city; and have a supportive fan base with home game attendance totaling 1,066,627 fans.

## BUSINESS SITUATION

The Jaguars sales team began the process of seeking out an electronic signature solution that could improve internal efficiencies by enabling quicker executions of season ticket agreements – via a paperless process.

## SOLUTION

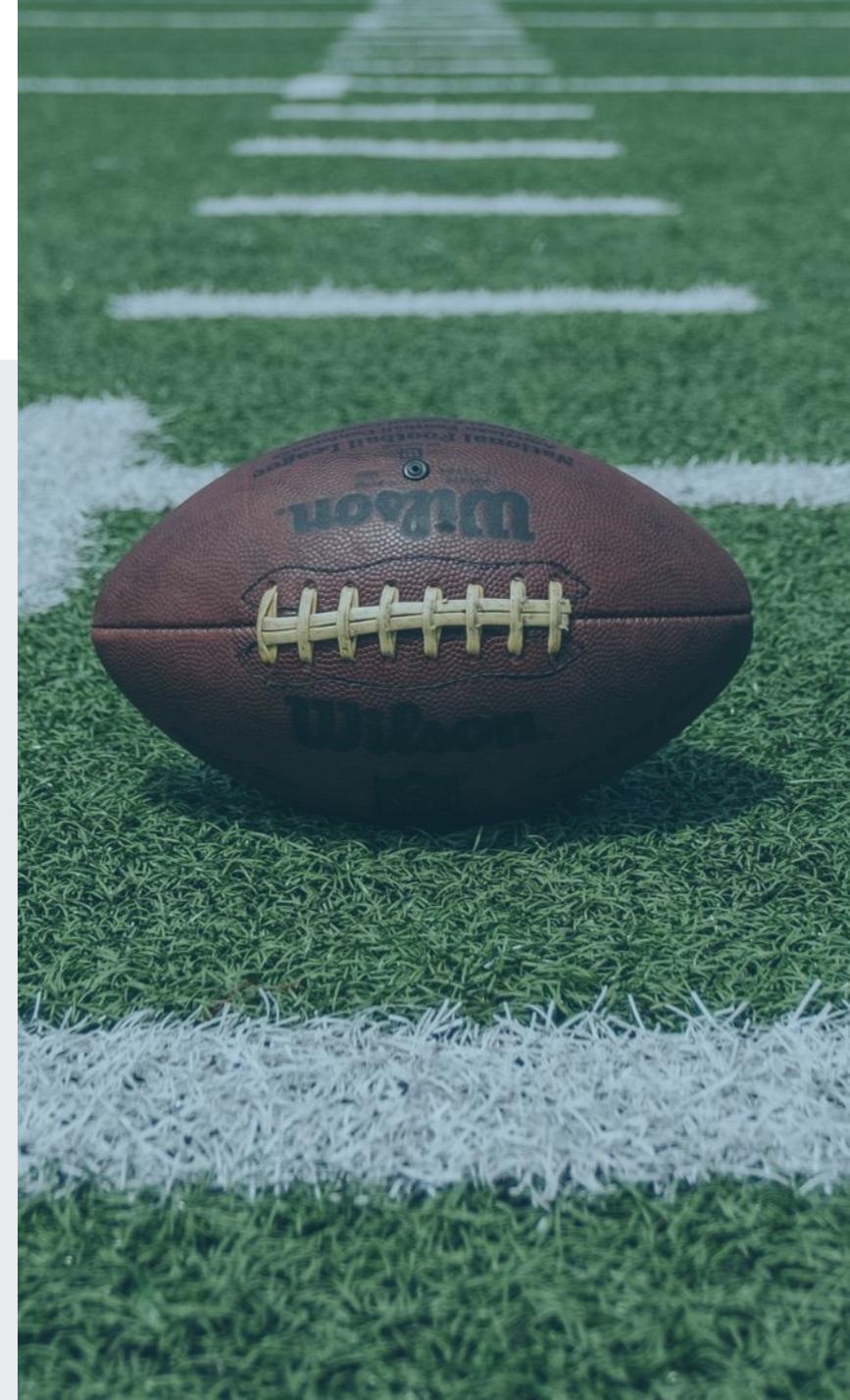
The football franchise adopted Nintex AssureSign which integrates with its Microsoft Dynamics CRM to bulk send and manage thousands of agreements at a time.

**Greater visibility and tracking** into agreements dispersed and awaiting signature

Allows sales team to reach larger customer segments **easier and faster**

**Tripled** number of agreements sent out without enlisted additional resources

Source: Nintex Case Study





# Coca-Cola Beverages Florida

## PROFILE

Coca-Cola Beverages Florida, LLC (Coke Florida) is a family-owned, independent Coca-Cola bottler with exclusive territory covering more than 20 million consumers across 47 Florida counties. Coke Florida has more than 4,600 employees and sells, manufactures, and distributes more than 600 products of The Coca-Cola Company and other partner companies.

## BUSINESS SITUATION

As a start-up company, Coke Florida acquired the territory it operates in three phases resulting in processes that were not fully integrated.

## SOLUTION

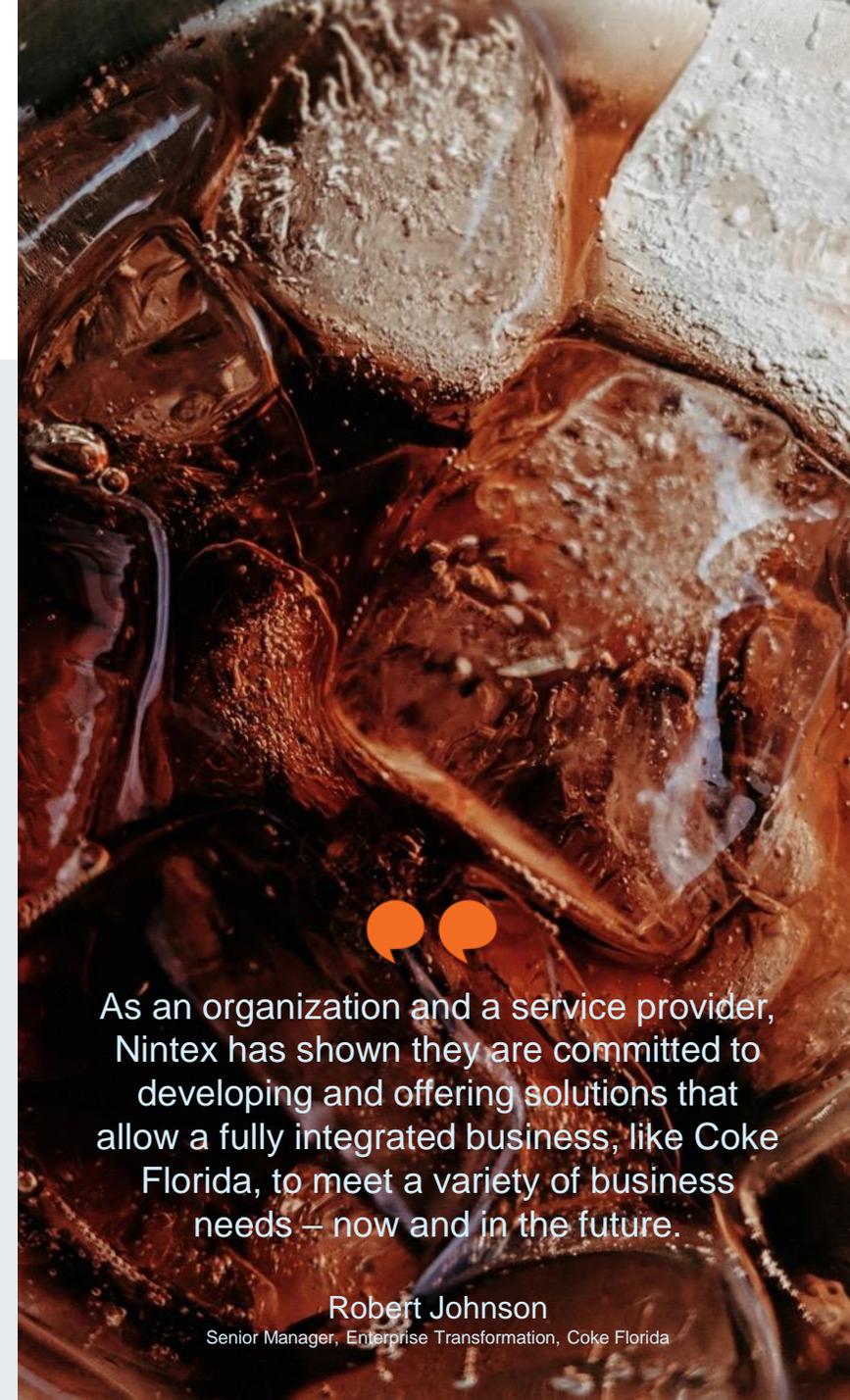
To enable end-to-end integration across manufacturing, sales, and distribution operations and to ensure efficiencies across all operations, Coke Florida uses the full suite of Nintex products, including Nintex Workflow Cloud, Nintex Workflow for Office 365, Nintex Forms, Nintex Promapp®, DocGen®, and Nintex RPA®.

**Ensures safety, quality, and integrity** in all operations

**Reduces time** for ISO audits and preparation

**Facilitates continuous improvement**

Source: Nintex Case Study



As an organization and a service provider, Nintex has shown they are committed to developing and offering solutions that allow a fully integrated business, like Coke Florida, to meet a variety of business needs – now and in the future.

**Robert Johnson**  
Senior Manager, Enterprise Transformation, Coke Florida



# New Belgium Brewing

## PROFILE

New Belgium strives to be a role model for other businesses in its impact on the communities it serves and the planet itself. The craft beer maker has breweries in Ft. Collins, Colorado and Asheville, North Carolina.

## BUSINESS SITUATION

New Belgium Brewing Co. had five months to implement an accurate, standardized way to respond to privacy requests from California residents—or face big fines.

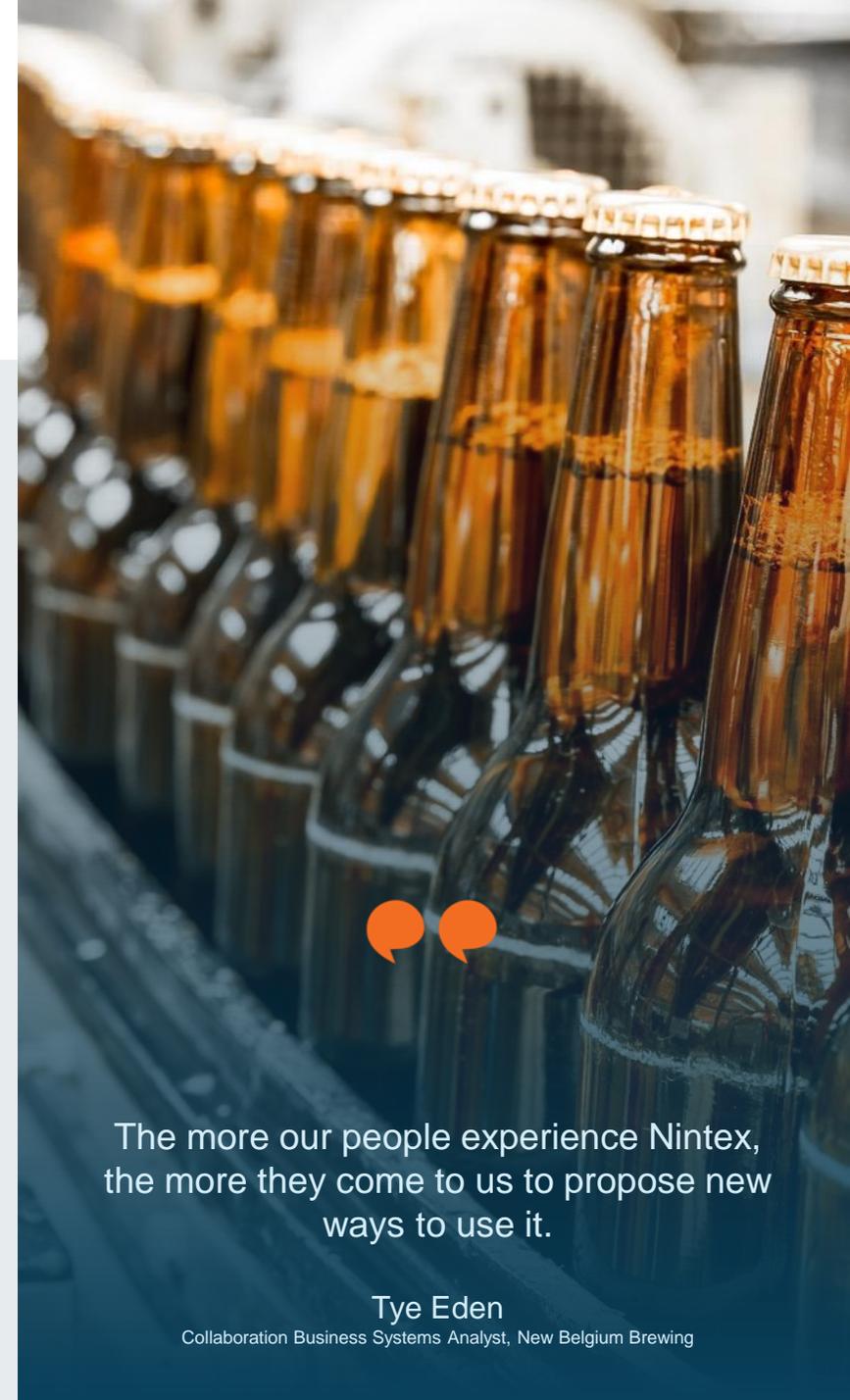
## SOLUTION

The company turned to the same technology it has used for 12 years: Nintex. It created a streamlined, automated workflow solution that facilitates every step of the process, in and out of the cloud, within the company and between it and the consumer.

**Fast, easy** solution created in just one month

Enables response to consumer **2X as fast as law requires**

**Flexible technology** is always on hand to address challenges

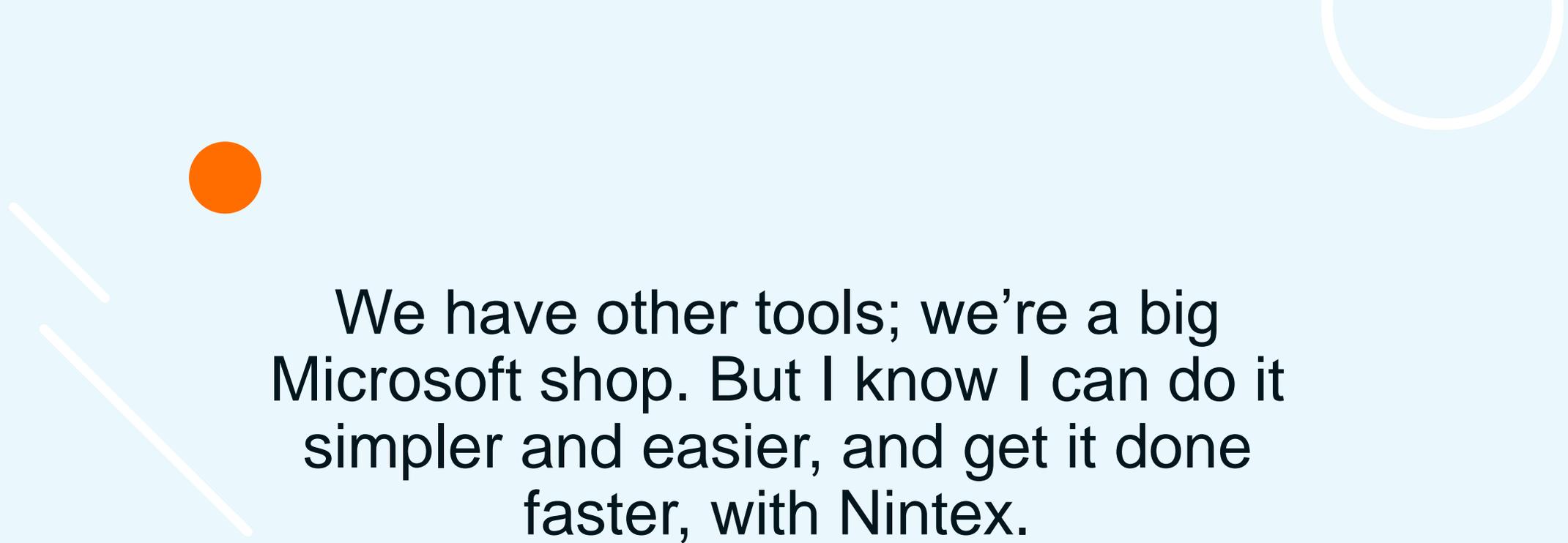


The more our people experience Nintex, the more they come to us to propose new ways to use it.

Tye Eden

Collaboration Business Systems Analyst, New Belgium Brewing

Source: Nintex Case Study



We have other tools; we're a big Microsoft shop. But I know I can do it simpler and easier, and get it done faster, with Nintex.

**Tye Eyden**

Collaboration Business Systems Analyst  
*New Belgium Brewing*



# Thank You!

Safe travels, and may you continue to be at the forefront of this exciting journey towards an automated future!



**OVATIONS**

EVALUATE | INNOVATE | TRANSFORM