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When To Use Workflow Automation: The Beginner's Guide

Tips and strategies for knowing when to automate (and how to do it!).

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Introduction

Workflow automation can be incredibly beneficial for businesses of all sizes, helping streamline processes, reduce manual data entry, and save time and money. In fact, at a time when 94% of workers still say that they have too much manual work, 90% of knowledge workers name workflow automation as a tool that improves both productivity and workplace satisfaction.[1] In 2024, workflow automation is no longer a new phenomenon in the corporate world, but central to how companies — and their employees — understand their work.

But while automation continues to rise in the workplace, market uncertainty and ongoing budget constraints have many departments scaling back on new implementations. No one can afford a bulky overhaul, workflow disruptions, or adoption roadblocks — which is precisely why forward-thinking teams are turning to no-code automation, the solution that allows employees at every level of the organization to design, build, publish, and revise workflows for gradual process improvements that don't rely on custom code or developers.

The best no-code platforms seamlessly integrate with your existing systems and work quietly behind the scenes, minimizing manual follow-ups, escalations, and errors. For many who may be new to digital transformation, the first question is often: how do I start? How can you know what kind of current workplace processes call out for automation?

In this guide, we will walk you through what kinds of clicks, emails, and data input could be streamlined and automated, so that you can spend more time on higher-value activities — but first, a quick refresher on what workflow automation is in the first place.

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[1] C Zapier Editorial Team. (20 April 2021). "Zapier report: The 2021 state of business automation." https://zapier.com/blog/state-of-business-automation-2021/
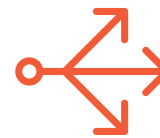
What is Workflow Automation?

Almost everything we do in our lives – especially in a professional setting – is a part of a process that we could consider a workflow.

The most common (and the worst) workflow system in the world is email. Think about the back-and-forth in your inbox that swirls around a request: first, a simple question is asked, then three follow-ups, an escalation to a manager who cannot see the attachments, more back-and-forth — and finally, if you're lucky, resolution through a third-party application.

Any process with known variables and expectations that repeats itself, or could repeat itself, is a workflow.

Even something as everyday and ordinary as serving a cup of coffee could be conceived in the framework of a workflow process:

- "Intake-ing" an order from a customer

- Triaging the order to the appropriate barista

- Making the coffee according to the request (black, with cream, with sugar, iced, etc.)

- Completing the order and serving the cup

What automates a workflow are the conditions on the back end driving the process — or in this case, your coffee order — from one step to the next. Workflow automation does not necessarily reduce the number of people involved in a particular process, but it does reduce the uncertainty of varying requests by predetermining potential outcomes ["if hot drink, then use insulated cup"] to increase efficiency and reduce error.

Taking it a step further, a no-code workflow automation solution puts the power to transform processes directly in the hands of your users with intuitive drag-and-drop designers, self-service features, and one-click publishing. You define the flow of logic that will drive each stage to its next action and configure your workflow with real-time collaboration, conditional routing, and integrations into your existing ecosystem — all without a single line of code — to optimize even complex processes without ever calling in IT.

In the corporate world, workflow automation software makes it easy to gradually replace repetitive, manual, and paper-based tasks, enabling people to work more efficiently, save time, and cut costs.

Not a Programmer? Not a Problem. Enter No-Code Automation.

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Knowing When to Automate: Start Here

Once you start thinking of something as simple as serving a cup of coffee or responding to a flurry of emails as a workflow process, you start seeing workflow opportunities all around you. Some of these processes are ripe for automation, and some of them resist it. Learning where and when workflow automation tools will save you time and make your processes more efficient is the first step toward a faster, more productive workplace, where employees feel empowered by the technological tools around them.

Here are the five questions to keep in mind when deciding what to automate:

1. Is your process high volume and high touch with predictable variations?

A simple process that takes place not-very-often is not necessarily a good use case for automation, but processes that run frequently are. When a process runs its course, it is common for there to be a "most common" path that it runs down – nine times out of ten, for example, the boilerplate company NDA will work, but for the one time it does not, there are a limited number of additional options. When your process has limited variables, it is easy to automate it and account for those conditions.

In a recent webinar on getting started with workflow, Tarryn Puzsar, Director of Business Process Automation at KP Lab, explains that when she started consulting with Sami Najm, Director, Legal at Rubrik, they found that the highest-touch, most repetitive requests that they dealt with were "evaluation agreements" – and realized the high ROI potential of automating them.

They asked, "why did it require a human touch to send the same information over and over again for each agreement?" And when they couldn't justify the answer, they turned to workflow automation.

> **"This was an easy, low-hanging fruit for us that opened the door for automating more agreements. The instant feedback we got was that the lack of human touch after we automated our evaluation agreements really sped up the contracting process for the sales team. And from the commercial side, the sales team loved that their sales cycle shrunk as the legal team got these agreements out faster and reduced churn."**
>
> **— Sami Najm, Director, Legal at Rubrik**

Bringing it home: high-volume, high-touch processes that workflow can automate

✴ **Streamline NDAs, evaluation agreements, and privacy agreements (as implemented by KPLabs!)**

✴ **Set up internal and external surveys for product management**

✴ **Incorporate automated case review workflows for legal operations**

2. Does your process include endless back-and-forth emails?

When a process requires countless back-and-forth communications, chances are, it might be worth automating. If emails tend to proliferate over seemingly simple requests, it means that your stakeholders are not asking questions as efficiently as possible.

This is a common issue in contract approvals. When one clause of a contract changes, a domino effect often takes place, requiring that stakeholders return to earlier approvals and double-check the process, then redline and re-approve as needed. Contract approvals also require delicate relationship management and time-sensitive actions. This can be a time-consuming and repetitive process, so it's no surprise that teams are leveraging automation technology as an extension of their team to organize and develop better, more strategic workflows.

Workflow automation streamlines the contract management process and breaks it down into three simple steps:

- ⊘ Fill out an intake request form designed with user or historical data pre-fills, help text, and required fields.

- ⊘ Intelligent business logic routes the form to the appropriate approver who can request more info, collaborate, or escalate.

- ⊘ Once approved, the contract is generated with dynamic clauses, routed through e-signature, and automatically stored in a secure repository.

Bringing it home: Use workflow automation to eliminate inefficient reminders and follow-ups.

✴ **Build a one-stop portal for common legal requests**

✴ **Use workflow automation to support your Salesforce users**

✴ **Get the details the first time: workflow for financial management**

3. Do your processes pull together hard-to-find information that you need to have audit-ready?

When information is strewn across an organization, or even (and especially) when the relevant information exists outside of your organization, it can be very difficult to track it down and pull it to the right place. Once hard-to-find data is located, it needs to be centralized or else it will be subject to revision issues.

Even when companies leverage their matter management systems as a "single source of truth," there can be issues in gathering all of the right information and putting it in the right place. For example, claims managers can tell you that when an incident occurs, it's going to produce a whole lot of paperwork, and how this paperwork gets gathered, submitted, and saved is going to make or break your process. Once a report is filed, it's up to all of the independent players to collect, relay, and manage all the related materials, which is often done in email, spreadsheets, or even by mail.

Gathering evidence quickly, uploading it immediately, and maintaining its chain of custody are all critical for claims management requests — and this can be tricky, time-consuming, and subject to error without workflow automation software. Workflow technology uses hidden logic to ask the right questions and require specific fields, so that field managers do not need to guess what is important. Once information is gathered, your platform should maintain records so that everything is audit-ready.

Bringing it home: Use workflow automation to achieve high levels of compliance and full audit trails.

✷ **Automate the claims intake process**

✷ **Manage the location, access, and security of corporate documents**

✷ **Keep track of moving pieces with event sponsorships**

4. Do you have the data from each process to continuously elevate your results?

Even when a process is standardized and produces a predetermined set of possibilities, stakeholders, customers, and even team members can find themselves in the dark wihtout a birds-eye view. This is especially true for business-critical tasks like NDAs and MSAs that are tied to sales goals and company performance. It's not enough to automate a flawed process; you need insight into the root cause of delays and bottlenecks — is it workload distribution? Staffing needs? Delayed response? Unnecessary steps? These gaps can only be uncovered by looking at each step of the process and the meta-data attached.

Luckily, each process that you oversee with workflow automation powers data and analytics that can drive better high-level decisions and allow you to constantly improve and iterate. When a process is automated, you can continuously gather and view information regarding its efficacy, with data such as:

- How many processes are in progress or completed

- Granular reporting on how recipients responded to requests

- Potential issues with automatically calculated risk

- Time to completion and the steps that have the greatest lag

The ability to see your analytics at a glance and then customize dashboards with drill-down capabilities is crucial for the success of your department and the processes serving it. With workflow automation, after you gain visibility and transparency across your whole organization, you can make process improvements on the fly with the no-code capabilities of your platform.

Bringing it home: Leverage workflow automation to strengthen data-driven decisions.

✳ **Align stakeholders in risk assessment and partner onboarding**

✳ **Make your employee onboarding lifecycle completely transparent—and customizable**

✳ **Ensure compliance and immediate turnaround with corporate gift guidelines**

5. Do you find yourself repeating certain answers to common questions?

If your team members find themselves spending too much time answering the same questions, chances are, those emails could be incorporated into a self-service portal powered by workflow automation. A recent survey reveals the average worker spends just over 50% of every workday on low-to-no-value tasks, such as answering questions that really should be triaged automatically and automated.[2]

Savvy lawyers are familiar with the SRY principle — the edict that you should "Stop Repeating Yourself." You find repetitive work everywhere once you start drawing boundaries between the critical thinking you enjoy and the dreary, burnout prefigurations of daily tasks.

Workflow automation can power portals where frequently-asked questions and repetitive requests can be automated and removed from your to-do list. As an individual keys in a particular request, workflow ensures that specific, customized questions appear in response to their actions, so that triage happens automatically. Nine times out of ten, the requester can be automatically shown the correct answer, the appropriate template to use, or the company policy.

Bringing it home: Use workflow automation to frontload, streamline, and automate intake.

✸ **Review and approvals for event planning**

✸ **Provide a one stop location for marketing requests**

✸ **Empower Sales to sell by supercharging the Salesforce integration**

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[2] Ariella, Sky. (Nov 12 2022). "23 Opportune Time Management Statistics [2023]: Facts, Data, and Trends." https://www.zippia.com/advice/time-management-statistics/.

If you answered "yes" to any of the following questions, it may be time to consider workflow automation for your organization. It's critical to find a partner that understands your needs and a platform that can address them. Ideally, your partner and platform will be able to meet you wherever you are at: whether you are a large organization and a vision for your full tech stack, or you are smaller and looking to automate as you grow.

Start Today, Scale Tomorrow.

Apply automation to any process, and watch its impact spread to every department.

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About Mitratech

Mitratech is a proven global technology partner for corporate legal, GRC, and HR teams seeking to maximize productivity, decrease costs, and mitigate risks by deepening operational alignment, increasing visibility, and spurring collaboration across their organizations. By partnering with customers to design, develop, deliver and support the best legal, GRC, and HR software solutions on the market; Mitratech enables departments to become hubs of efficiency, innovation and excellence for the entire organization.

 Mitratech's Platform provides expert product offerings to organizations worldwide, supplying end-to-end solutions that enable them to implement best practices and standardize processes across all lines of business, as well as effectively manage risks and ensure business continuity.

Mitratech serves over 7,000 organizations worldwide, spanning more than 160 countries.

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