5 Questions to Ask Digital Process Automation Vendors

Choosing the right vendor is crucial to your organization's DPA program.

You know you're ready to undertake a digital process automation (DPA) initiative within your organization, but you have no idea where to begin. This is understandable: There are countless components to consider, but one of the first steps must be choosing a technology vendor that offers a DPA platform that will meet your needs and deliver on your strategic goals.

Even a well-constructed DPA strategy and launch plan can be undermined by selecting the wrong vendor. For example, if the resulting solution delivers a sub-par user experience, adoption rates will likely suffer. Or alternately, if custom development is required to implement your DPA solution successfully, this will complicate future product upgrades.

In addition, selecting the wrong vendor could leave you in the lurch when it comes to product support. You want to be certain you'll have access to the support you need once the solution goes live.

So, ask prospective DPA vendors the following five questions to make sure you choose the best partner for your organization.

1. How Long Will Implementation Take?

There are dozens of vendors selling DPA products, and very likely there is more than one that could deliver an end solution that works for your organization. One great way to begin narrowing down vendors is by asking how long it typically takes to go from signed contract to launch.

The faster the solution can be rolled out, the lower the total cost of implementation and the faster you will begin seeing ROI. Generally speaking, you'll want to favor those vendors that can deliver results quickly (think weeks or a few months, instead of many months or even years).

Savvy vendors will also likely propose an iterative implementation approach. They'll look to identify obvious pain points that can be addressed immediately, as those incremental process improvements can serve as a proof of concept for the overall DPA program.

[1] https://www.forbes.com/sites/theyec/2021/03/15/growing-your-business-how-process-automation-can-help-and-why-you-need-it-sooner-than-later/?sh=3d6a2499243f

2. Does Your Platform Have the Critical Capabilities I Need?

Every organization has its own unique business processes, and the individual processes being automated via a DPA program will vary in scope and complexity. As such, specific purchase criteria will differ from one organization to another. However, there are some standard features you should expect from any DPA product in today's market:

- Low-Code Configuration: The best DPA products emphasize low-code configuration over custom development. This expands the pool of people who can build on the platform, speeds up implementation, simplifies maintenance and facilitates easier product upgrades in the future.

- Integration Capabilities: A key function of an effective DPA solution is the ability to integrate external systems and data sources related to a given process into a centralized interface in which process workers and end-users can collaborate on work activities. The best solutions make integration easy to configure and offer a variety of methods, along with a wide range of pre-built integration kits available for common business applications.

- Modern User Interface (UI): Users have come to expect consumer website quality design and usability in nearly any application or system with which they interact. DPA solutions are no different. They must provide a positive user experience in order to drive adoption and deliver the desired results.

- Role-Based Access to Processes and Data: Your DPA solution will need to cater to different audiences, so it must provide role-based access to the precise portal interface, data and tasks that are unique to each user group. The product you select should be able to authenticate each user logging in against a system of record and grant permissions accordingly.

- Reporting and Analytics Capabilities: Visibility into consolidated data supports informed decision-making. Reporting dashboards and console-style views of relevant data within a web portal interface are common approaches for presenting real-time business process data and activity statuses to applicable users.

- Responsive Design: In order to support a variety of work styles, DPA solutions must be accessible on mobile devices. Ideally, the solution should incorporate the concept of responsive design, where a single interface would size dynamically as needed to accommodate a range of devices, without sacrificing functionality.

3. Will Your Solution Provide a Suitable User Experience for My Customers?

Creating a positive user experience (UX) is a critical component of any successful DPA effort. While a poor UX will hinder adoption, a great UX will drive overall usage and maximize the value of your DPA investment.

DPA solutions built on web portal-based platforms make it easier to meet or exceed those user expectations. They allow you to deploy solutions with a modern UI on par with visually appealing and intuitive consumer websites.

Of course, usability is just as important for process builders and system administrators, too. The more intuitive the tools for building or updating processes, the less training time is needed for those maintaining the solution. Similarly, the more intuitive the UI design on the front-end, the less training time is needed for users.

4. Will Your Solution be Easy to Change or Expand Over Time?

Inevitably, your unique business processes will evolve over time. In fact, one of the benefits of adopting DPA is having a more agile approach to process improvement.

As such, you will want to take advantage of low-code configuration over custom development. Not only will a low-code development platform help you launch your DPA solution faster, it will also enable you to make changes more easily. Solutions built on DPA will always be easier to update or expand over time than those that have been custom-coded.

And the more intuitive the platform's low-code configuration tools are, the more likely solution development and maintenance responsibilities can be delegated out to a wider group of citizen developers within the organization, easing the burden on IT.

5. How Much Experience Do You Have with Similar Customer Implementations?

The vendor you choose to work with is just as important as its DPA solution. Not only do you want a great product, but you want to partner with a company that has a solid track record of successful client implementations.

Look for case studies and independent customer reviews to provide insight into the vendor company. And of course, set up reference calls with current clients. Vendors with rave reviews and a high rate of client retention should be on your short list.

You might run across some DPA vendors that prefer to outsource the actual implementation consulting services to third-party partners. While this model isn't necessarily a deal-breaker, you may want to dig a little deeper. What level of accessibility will you have to the product vendor, and will you have the opportunity to provide feedback and influence the product roadmap?

Look for DPA vendors that demonstrate a depth of experience in collaborating with clients on all aspects of an implementation project, including requirements definition, solution design, iterative development, testing, launch and ongoing support. Focus on those vendors with solid reputations as good partners, and ultimately select a vendor with whom you feel comfortable forging a relationship.

About PMG

PMG offers a low- and no-code software platform that empowers businesses to quickly build applications and automation solutions using drag-and-drop designers. For 15 years, enterprises have achieved 70%-80% efficiencies in their business processes by using PMG. The platform is architected to support quick wins, delivering powerful and sustainable solutions through configuration rather than coding. Most importantly, PMG delivers on its promise of committed partnership, ranking highly in G2.com's relationship metrics for low-code DPA providers. For more information, visit www.pmg.net.

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