

Put It Forward

The 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:

- ▶ Revenue teams are drowning under waves of engagement data without powerful tools for customer experience analysis often resorting to spreadsheets
- ▶ Lack of resources and easy to use powerful technology make it all but impossible to scale with the growing needs of the organization
- ▶ Intelligent automation technology offers an alternative to manual processes and disconnected insights that are cost effective and easy to use
- ▶ ***These playbooks and blueprints*** show you how to leverage Intelligent Decision Automation for scale, revenue and efficiency

Table of Contents

The Revenue Landscape	04
Current Challenges	07
Finding the Right Solution	12
Three Blueprints For Revenue Creation, Process Automation and Data Science	15
How Customers Use Put It Forward to Solve End to End Revenue, Operations and IT Challenges	23
Getting Started with Put It Forward IDA	28

The Revenue Landscape

It's super fractured and organizationally distributed

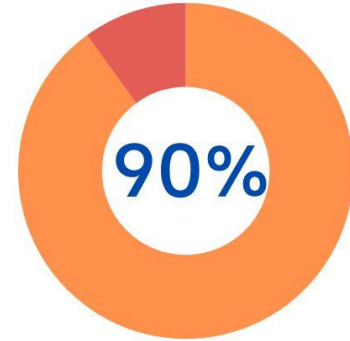
Predictable Revenue

Trusted Insights

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".



90% 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

Impact of disconnected revenue from financial planning
Forrester

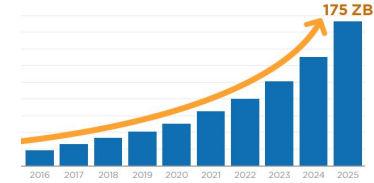


Current Challenges

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.



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



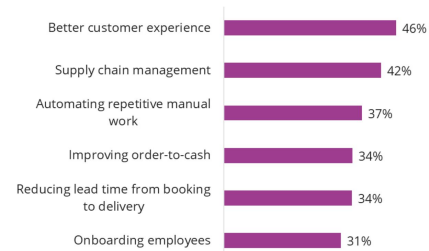
Challenge #3

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 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 enable better decisions, which means higher confidence in outcomes and less hassle.



Three Blueprints

For Revenue Creation, Process Automation and Data Science

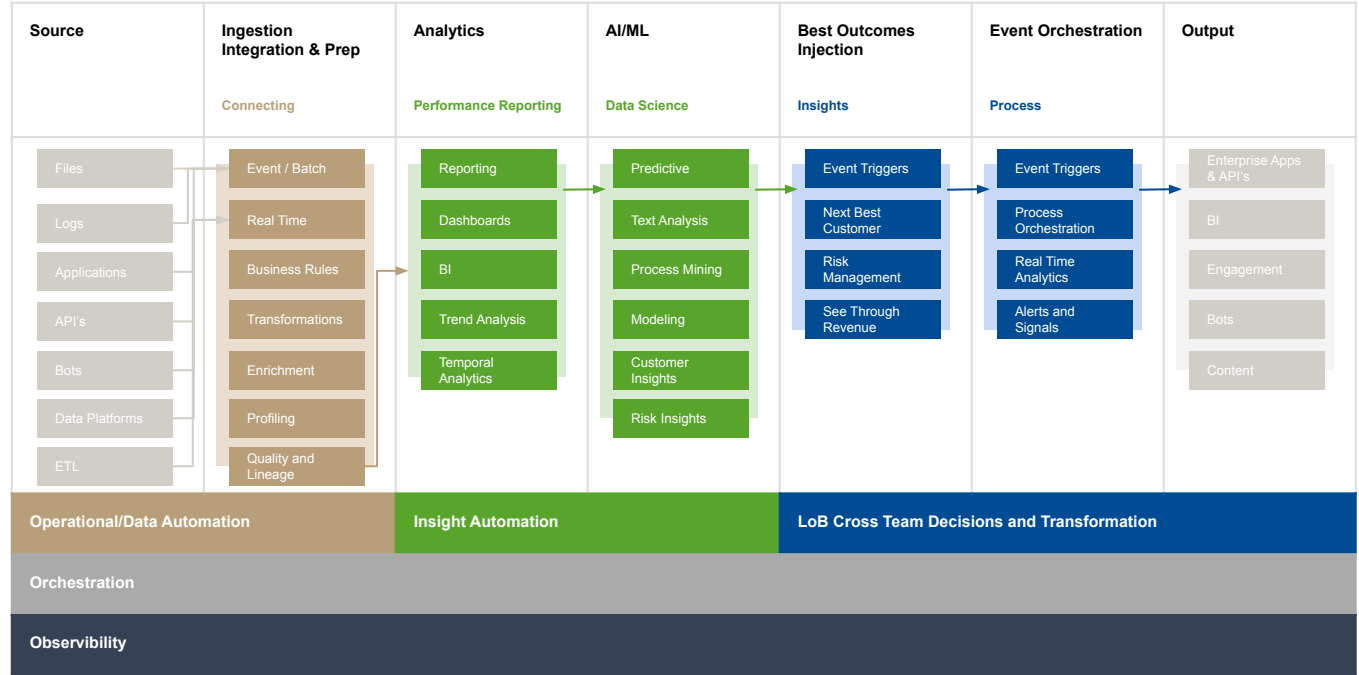


How it Fits Together

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's IDA 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 three common use cases solved by Put It Forward's Intelligent Decision Automation Platform that revenue teams, operations and finance are solved for.



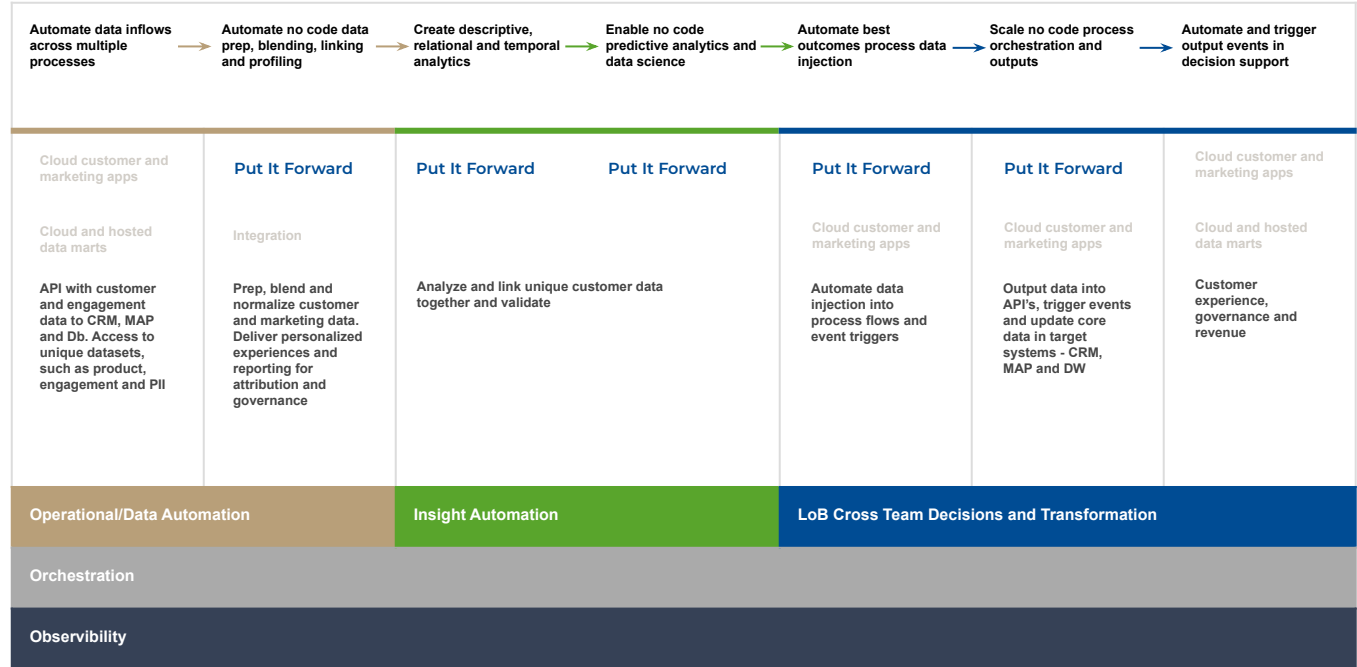
Blueprint #1: Process Automation and Data Insights for Customer Experience

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's IDA platform they can now deliver highly personalized and targeted experiences to organizations looking to leverage the OpenTable Platform.

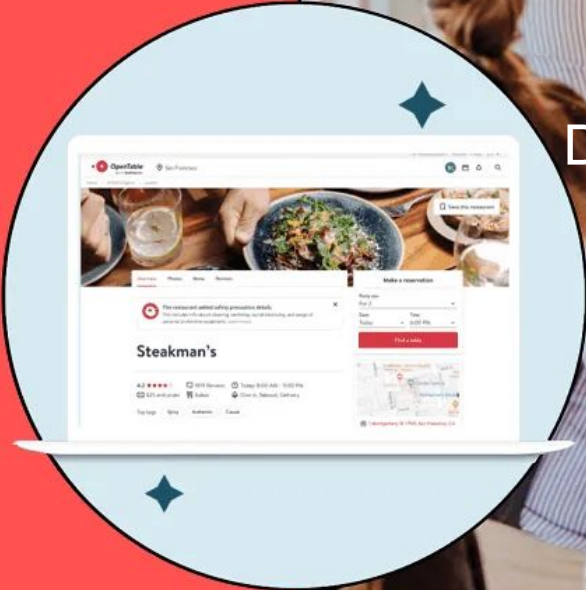


This blueprint represents a generic use case scenario for customer experience process automation and insights



OpenTable

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



Blueprint #2: Revenue Creation Automation - Better Decisions at Scale and IoT

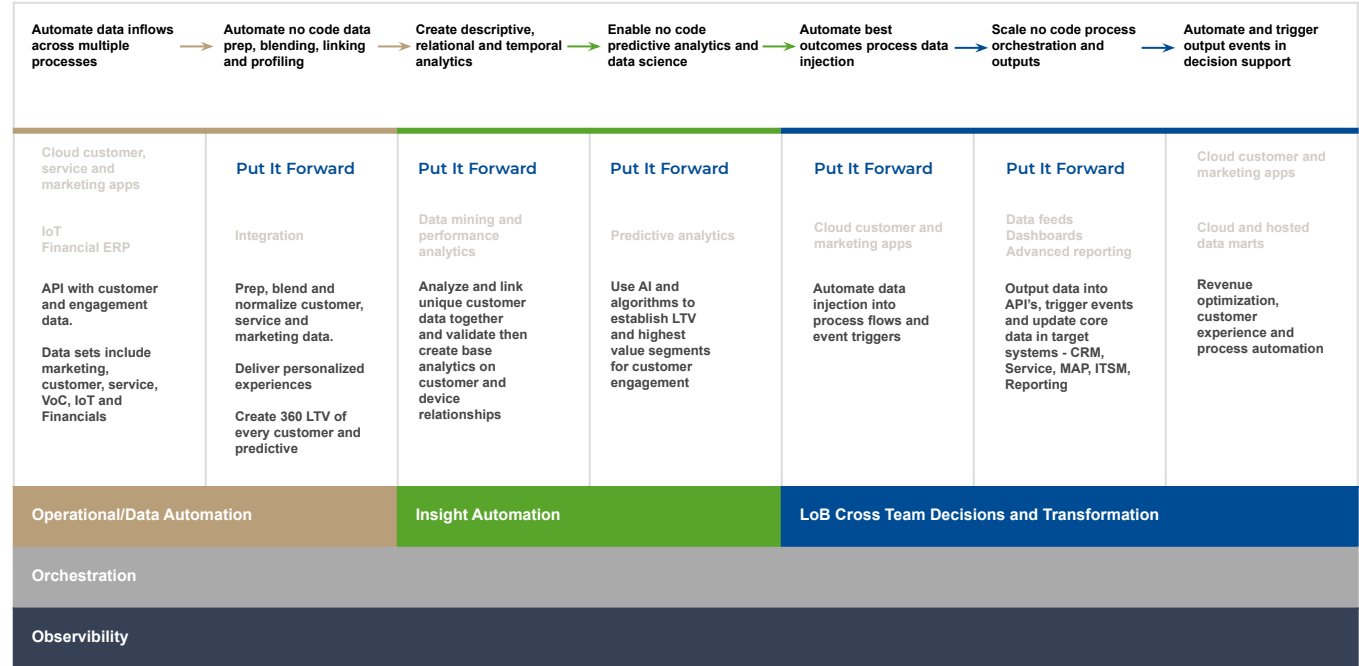
Some say that the sounds we hear and feel are the ultimate experience which connect us all together.

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

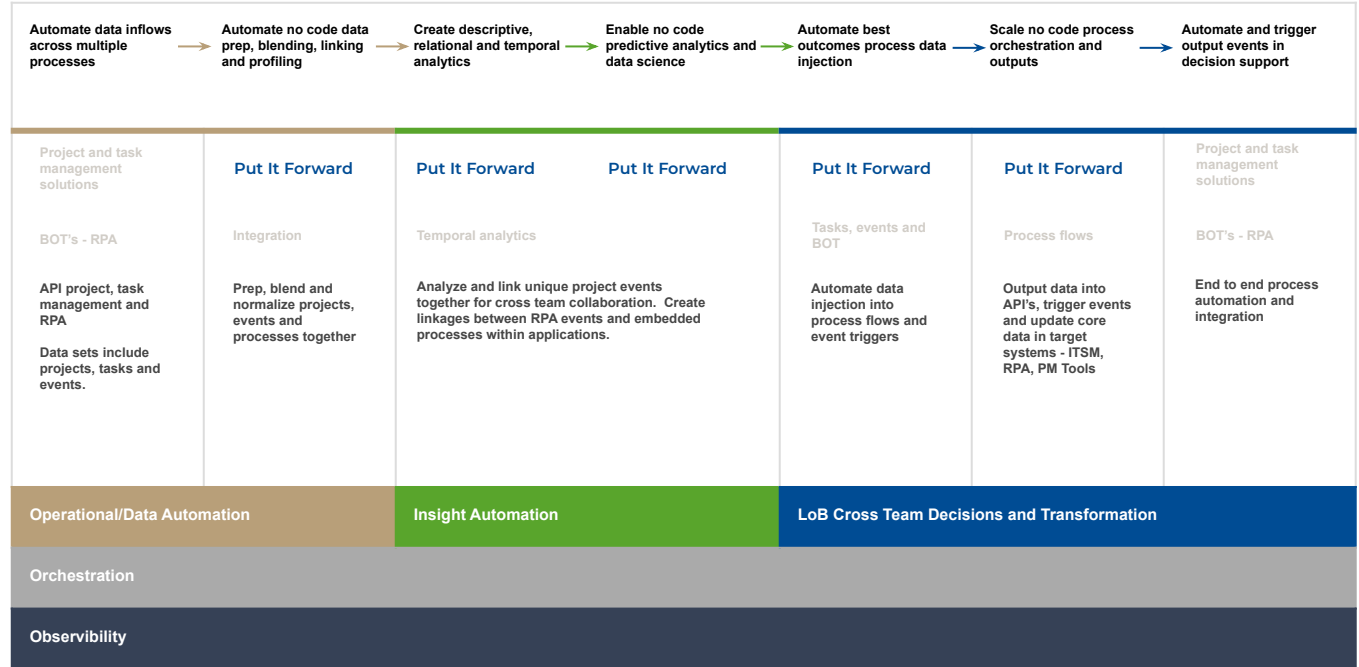
#1 Category Leader For Revenue Per Customer

Blueprint #3: 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 bring 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 end to end automation uniting RPA with process and functional execution.



Brookfield - BGRS/SIRVA

End to End Process Automation

75% Cost Time Savings

Global Workforce Mobility Solution Provider

How People Use Put It Forward to Solve End to End Revenue, Operations and IT Challenges



Because your future revenue and operational challenges are uncertain

Leaders in revenue, operations and IT need an automation strategy that is going 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 Decision Automation platform is the superior market offering to unlock the true potential of your organization. Beyond being able to create insights at scale, create the best possible processes and help IT and work all within a visual interface. Put It Forward's IDA offers integrations between hundreds of your solutions including Microsoft, Oracle, Adobe, SAP, Salesforce etc.

Hundreds of Included Integrations



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

Operations and Finance

- ✓ Process Automation
- ✓ FP&A
- ✓ Anomaly Detection
- ✓ Predictive Analysis
- ✓ Risk Analysis

IT

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

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 IDA 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's 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.

[IA Guides and Solutions](#)

