



Engagement Workflow for Today's Enterprise:

*Working with Customers through Social Media,
Mobile and Cloud Capabilities*

BP Logix
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Process Driven, Business Focused

www.bplogix.com

Your Business, Your Customers, and Workflow

The pace of business is fast — and getting faster. It is also becoming increasingly more complex. Companies that want to remain competitive need to address business-critical issues quickly using solutions that are aligned with how their businesses operate, while also not disrupting the customer experience. To do this, they need to adopt tools that enable their businesses to be more efficient and more adaptable to changing business and market requirements.



The operations of a business have a cadence, as does customer behavior. When there is synchronization of these two movements, it encourages tighter integration of the customer within the fabric of the enterprise. It means that there is alignment among operational, technology and customer-focused goals, which ultimately helps establish the company's brand as one that values customer nurturing and focuses on customer satisfaction.

Businesses can take advantage of a variety of technologies to help them remain close to their customers. To really map what an organization does for its stakeholders, requires a solution that supports internal goals, along with easy access for end-users. In today's market, whether business or consumer, customers are accustomed to on-demand access from almost any and all devices. Delivery of a mobile app doesn't just help bring in more touch-points, it actually signals that the business wants to engage and is ready to transact in a way that's convenient for the user. Social tools and cloud-based availability are among the ways that companies can deliver value and leverage existing technology investment when connecting with customers.

Increasingly, forward-looking organizations have begun to look for ways to extend their business processes not only more broadly across their own enterprises, but to their customers, partners, and suppliers. And we also recognize that there are three elements, which enterprises need to provide in order to practice what we call, "engagement workflow":

- **Engage the customer** by making it easy for her to communicate her problems and expectations, and for you to acknowledge them.
- **Embrace the customer** by enabling him to participate directly in business processes you have designed for them.
- **Extend the cloud** into your work environment by integrating popular cloud services within your workflows.

Process Director from BP Logix has always had customer needs at its core. It now offers advanced social media integration and a cloud option to enable businesses to be more responsive and effective when working within the ecosystem of stakeholders — customers, vendors, partners. By extending workflow and processes to those who have a vested stake in delivery of your products and services, Process Director takes advantage of current technology

like no other workflow solution. With enhanced mobile support, social media integration, new cloud capabilities, and multimedia annotation, Process Director helps businesses make their internal processes more efficient—while also increasing communication with partners, suppliers and customers who are engaged in their business processes.

Engage the Customer

Customers today set a higher price than ever before on loyalty. They expect not only outstanding products at reasonable prices—but also demand both round-the-clock access to company representatives and swift resolution to their problems.



Social media, mobile apps, and cloud-based services have been the primary drivers behind this shift to greater customer engagement. The legacy customer service model of a (frequently offshore) phone center accessed via IVR (interactive voice response) systems has been completely upended by the simplicity and immediacy of Twitter and Facebook. Meanwhile, brick-and-mortar retailers—those hardy survivors of the first e-commerce revolution—are facing competition within their own walls by customers “showrooming” products on the shelves while seeking lower prices online. Customers are mobile, connected, and have high expectations..

How can BPM software help you to engage these customers? By making sure you can reach them where they live: in the mobile, socially-connected cloud. Process Director gives you the power to:

- Drive workflow behavior from social media events (such as a tweet or Facebook status update)
- Respond to your customers via Twitter (tweet, RT, DM, reply)
- Manage Facebook campaigns (likes/unlikes, comments)

Engaging your customer through Process Director will help you can gain exposure, increase customer satisfaction, and ultimately improve retention rates.

Use Case

1

You're waiting for your flight to push back from the gate, comfortable in the business class seat the airline upgraded you to just before boarding. As directed, you are reviewing the safety information card from the seat back in front of you when you realize that the overhead light isn't working. You send a tweet:



2

Your airline is a step ahead of competitors. They have deployed Process Director to identify and respond to customer issues. The customer service agent receives your tweet, and from the same window, opens a service ticket to have Maintenance look into the issue at the next airport.



3

Once the ticket has been created, the agent sends you a response via Twitter, from the Process Director smart form:



4

Fortunately, there's another seat available. You settle in, reassured by the knowledge that you were able to reach somebody at the company who actually cared about your issue.



Fortunately, there's another business class seat available. You settle in, reassured in the knowledge that you were able to reach somebody at the airline who cared about your issue — and will make the flying experience on your airline better for the next passenger. And, of course, knowing that your airline cared about your request reinforces your loyalty to that carrier.

Embrace the Customer

Engaging your customers by connecting with them on social media is an important step. The next is to give them the opportunity to interact with you directly within your own business processes—processes that extend beyond your corporate boundaries to offer valuable services, not only to your customers, but to partners and suppliers as well.

Process Director enables you to provide a range of services to individuals outside your organization. Your customers can participate directly in your workflows as authenticated users by taking advantage of the accounts they already have from providers such as Twitter, Facebook, and Google. Your partners and suppliers can login as well using federated authentication technology such as SAML or ADFS.

Of course, Process Director includes strict, granular protections, so that outside users have access only to the workflows, forms, and data that you have authorized them to use. Offering secure access to your partners and suppliers, prospects and customers, enhances your value proposition and strengthens your relationships.

Use Case

Let's extend the previous example. Besides simply thanking you, perhaps the airline wants to go further and compensate you for your inconvenience. The customer service agent's response might be:



You go straight to the site and pick up the coupon. Because you're already logged into Twitter, and the offer is linked to that account, you alone have access to that coupon. You download it to your phone, and present it to the flight attendant. Drink in hand, you kick back and relax for the remainder of the flight.

Meanwhile, Process Director has opened a service ticket and added it to a group queue for Maintenance. The airline outsources its maintenance activities to a third party, however a technician from that company is able to log in to the airline's system and accepts the ticket. The technician is able to use his login credentials from his employer thanks to Process Director's support for federated authentication via SAML.

Extend the Cloud

Process Director has always enabled you to build and manage your business processes either within your data center or the cloud. Now Process Director brings the cloud to your enterprise, enabling you to integrate useful and popular network, and cloud-based services directly into your business processes. Save files to Dropbox, download documents from Google Docs, or populate form fields with data from Amazon SimpleDB. Whether filling dropdown menus using Google Docs, or collaborating with colleagues on a presentation using SharePoint, Process Director brings the cloud to your business processes.

Use Case

You work in a highly distributed enterprise. Projects are set up and torn down relatively often, and teams are highly dynamic. Project documentation is tracked within SharePoint, but tracking project organization—who leads which effort, who is involved, etc.—can be difficult. The company is attempting to track this information using the cloud—so that no matter where somebody is they have access to and can update relevant data.



Organizational data isn't useful for human consumption only; your business processes, for example, use this information to determine whom to assign a given task, or how an overdue task should be escalated. When an escalation event occurs, Process Director retrieves the necessary information from an Amazon SimpleDB table in real time, combines it with documentation extracted from SharePoint, and forwards a notification to the appropriate individual for further action.

Conclusion

We view Process Director as a tool that can change the way an organization operates in ways that enable the organization to be more efficient, agile and effective. Everyone benefits when our customers are able to do more, make better and faster decisions and demonstrate business and technical leadership for their partners, customers, suppliers and other third-parties. That's the value proposition Process Director provides.

*Let's talk about how we can help you use workflow to engage with your customers.
Learn more in our [Process Director demo](#), or call us at 877-627-5871.*



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