5 REVENUE PROCESSES

Ripe for Automation

Ramp up your revenue and crush your KPIs with Wrkflows that work for you.

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Glossary of Terms

DELIVERY PLATFORM

Our Delivery Platform pairs humans+machine technology (RPA, APIs, OCR, bots and more) to provide you with an easy-to-use tool that allows you to create high-quality work effortlessly.

CUSTOMER RELATIONSHIP MANAGEMENT (CRM)

Salesforce defines CRM as a technology for managing all your company's relationships and interactions with current and prospective customers.

OPTICAL CHARACTER RECOGNITION (OCR)

OCR is the use of technology to distinguish printed or handwritten text characters inside digital images of physical documents, such as a scanned paper document.

ROBOTIC PROCESS AUTOMATION (RPA)

RPA is an application of technology, governed by business logic and structured inputs, aimed at automating business processes.

APPLICATION PROGRAMMING INTERFACE (API)

An API is a set of programming code that enables data transmission between one software product and another. It also contains the terms of this data exchange.

INTELLIGENT AUTOMATION (IA)

Intelligent automation refers to the integration of robotics with multiple components from different emerging technologies.

WRKFORCE

Our Wrkforce is the name of our community of Wrkers. It is made up of individuals located across almost 30 countries (with this list growing on a weekly basis) who are integral to the success of our platform.

WRKFLOW

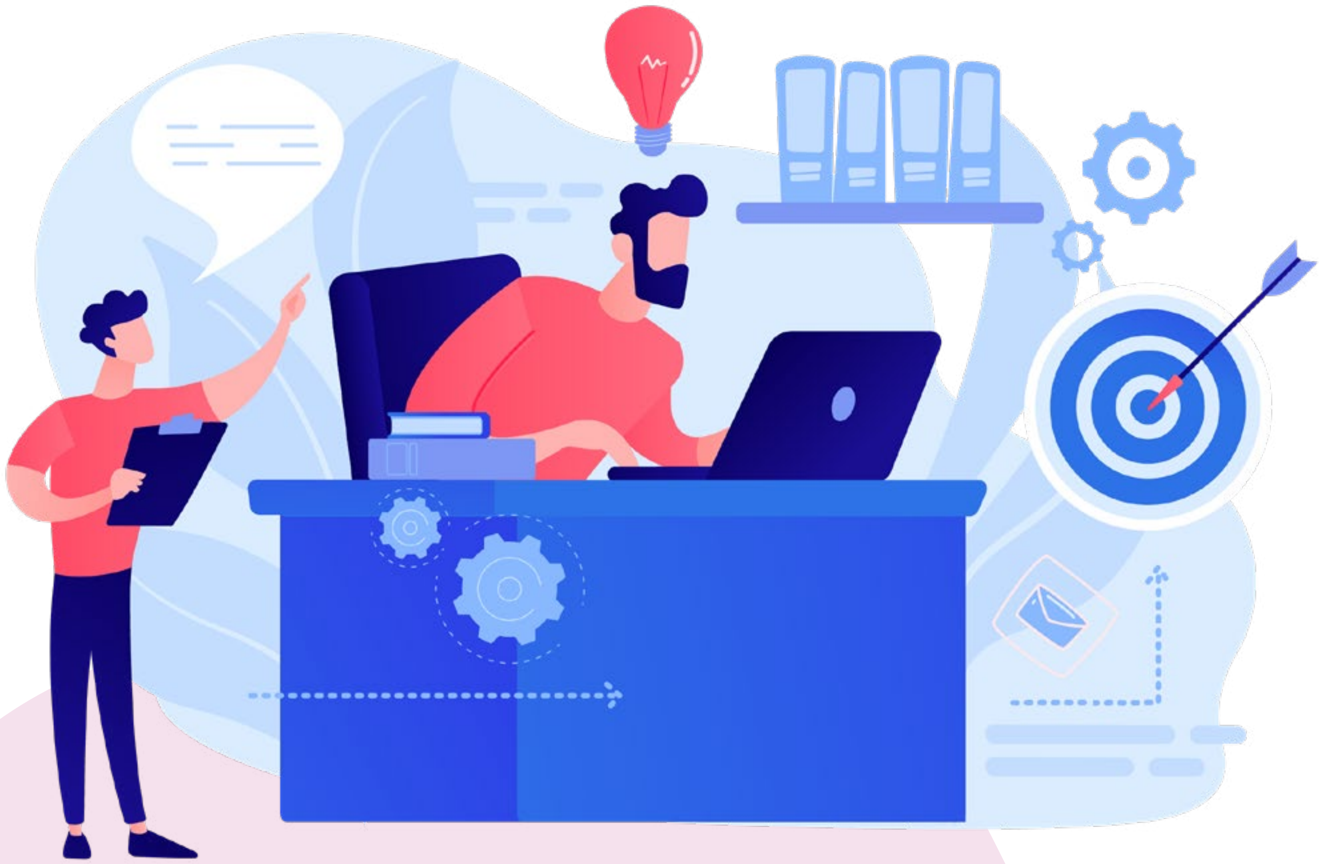
A series of Wrk Actions can be integrated to form a streamlined, automated Wrkflow that matches your business processes.

WRK ACTION

A simplified task representing a single step in a business process. Wrk Actions can be drag-and-dropped into a Wrkflow to automate even the most complex processes.

REVOPS

Revops is a rapidly-growing discipline that often rolls in marketing operations, sales operations, and customer operations—in essence, any operations team that touches business revenue.



Executive Summary

From lead management to client reporting, the number of revenue processes that can be enhanced with automation is extensive. In our latest eBook '5 Revenue Processes Ripe for Automation', we look closely at how Wrk's innovative Delivery Platform provides growing teams with the tools they need to accelerate their business efficiency goals without sacrificing quality or uprooting their internal processes. Using real-life case studies, we showcase how our easy-to-use, revenue-focussed Wrkflows have helped organizations across all sectors deliver the tangible results that contribute to ramping up revenue and crushing their KPIs.

Introduction

As organizations evolve and grow in a post-pandemic world, it is becoming increasingly important for revenue leaders to have the tools that make the scaling of their operations as effortless as possible. In this eBook, we dig deep into 5 revenue processes that are integral for successful organizations to master and show how they can be enhanced significantly with the help of our innovative Delivery Platform.

We also break down how our revenue-focused Wrkflows work and give you a first-hand look at how they have been used by organizations across a variety of industries to hit their revenue-relayed goals effortlessly. This includes everything from providing visibility on how our Lead Management Wrkflow combines the core elements of lead generation, lead prioritization and lead routing to ensure seamless connectivity between Marketing and Sales teams to highlighting how non-profit organization Penny Appeal used our Client Reporting Wrkflow to shorten the turnaround time for finding sponsors for their OrphanKind program.

Let's now explore how our revenue-focused Wrkflows can help your team achieve their goals today.

Lead Management

The duality of Hybrid Automation[1] is oftentimes mirrored by the multifunctional tasks that we are designed to enhance and make more efficient. This is particularly true when it comes to lead management. Much like Wrk, lead management tasks such as lead generation, lead routing, and lead prioritization, live between Sales and Marketing, requiring an automation solution that can share leads in real-time across partner CRM platforms. This increased visibility enhances the management of leads and also provides a seamless collaboration of the sales process between partners and internal teams.

Unfortunately, while many traditional automation solutions can expedite the lead management process, they are often cost-prohibitive and too rigid to ensure a complete end-to-end service. This is how Wrk is different. Let's take a closer look at how we were able to deliver tangible results for Cision[2], the global leader in PR and marketing communications.

1 https://hubs.li/Q015JR8T0
2 https://hubs.li/Q015JS3f0

How We Wrked for CISION

Cision partnered with Wrk because their Business Development, Sales, and Customer Engagement teams needed hassle-free, seamless, criteria-based lead enrichment and lead prioritization automation. Our Lead Generation and Lead Prioritization Wrkflows[1] proved to be the right fit, enabling Cision to reduce its lead processing times.

Our Lead Generation and Lead Prioritization Wrkflows[1] proved to be the right fit, enabling Cision to reduce its lead processing times. How did we do this? Simple. Our Lead Generation Wrkflow completed a robust data extraction process, consisting of sourcing public companies that use PR services, and extracting company data including PR contacts and relevant tech stacks. Our Lead Prioritization Wrkflow was then able to identify and prioritize leads that used specific competitor CMS and augment the leads using Zoominfo. Finally this data was exported into an Excel file to Google Drive for consultation.

Ultimately, our Lead Generation and Lead Prioritization Wrkflows[2] helped increase their sales revenue exponentially by increasing the number of leads processed per week—for a total of 1,700—which in turn gave the Cision Sales team the time and resources to focus on more high-value and forward-facing initiatives.

Try our Lead Management Wrkflow for yourself

1 https://hubs.li/Q015JSx80
2 https://hubs.li/Q015JT5l0

Account Planning

Success in business comes not only from securing new leads and customers, it also comes from fostering healthy and fruitful relationships with existing clients. Account planning is therefore a vital part of every business' strategy, leveraging in-depth knowledge of the client and their needs to encourage client retention and continued mutual growth. Our automated Account Planning Wrkflow can take this business process to the next level by tracking data relevant to specific clients and providing your Sales teams with regular updates so they can make more informed decisions for client strategies.

Account planning requires a fair amount of skill and analysis as it consists of learning about a client, including how they make decisions, what their goals are, and who their competition is.

So how exactly does our Account Planning Wrkflow fit in to this process? There are a few ways that our automation software can support Sales teams in their strategic planning. For one, our Wrkflow can track and extract metrics about the client, such as client sales revenue, employee growth via lists from LinkedIn, and funding and investment data from Crunchbase.

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Our Wrkflow can also check existing client lists to identify any clients that have not upgraded your product or services in the last six months. All this information, which traditionally would have to be checked manually and researched, is readily available, enabling Sales and Customer Success[1] teams to adapt client strategies, anticipate their evolving needs, and make contact from a well-informed position. In the end, our Account Planning Wrkflow takes much of the legwork out of staying up to date with your entire client list so Sales[2] teams can spend less time finding the information and more time understanding and acting on it.

1 https://hubs.li/Q015JW970
2 https://hubs.li/Q015JWYL0

Employee Onboarding

Human Resources departments[1] can benefit hugely from strategic automation, as workflows can seamlessly connect HR processes with other relevant departments and undertake many of the administrative tasks that eat up HR professionals' time. Arguably nowhere are the benefits of automation more clear than in employee onboarding. Even more so today given how important integrating new employees into an organization is when it comes talent retention and, as a consequence, future revenue growth.

Not only does integrating automated Wrkflows into this process enhance efficiency for internal teams, it also provides incoming employees with greater clarity and support in their transition period. With our dedicated Employee Onboarding Wrkflow, it is possible to automate multiple tasks at once, from scheduling interviews, training, and orientation sessions, to sending welcome documents to new employees, and sharing employee information with finance and IT teams to get them set up internally.

1 https://hubs.li/Q015JZCS0

How We Wrked for SNAPPY KRAKEN

Financial marketing automation provider Snappy Kraken[1] has seen the benefits of automating on-boarding with Wrk first hand. Using a tailored Wrkflow, the company has fully automated the process of adding and updating employee equipment information.

We can zoom in on the automation process even closer for a more detailed picture of how our Wrkflow automates this business process. As soon as a new employee contract has been signed, our Employee Onboarding Wrkflow automatically uploads it to BambooHR hiring software. From there, an email address is generated using a pre-determined template (i.e. firstname.lastname@company.com), which will subsequently be added to your business' operational platforms, like Slack, G Suite, Officevibe, and more.

Financial marketing automation provider Snappy Kraken[1] has seen the benefits of automating onboarding with Wrk first hand. Using a tailored Wrkflow, the company has fully automated the process of adding and updating employee equipment information. The Wrkflow is triggered by a Jotform submission. From there, it locates an employee folder and extracts data from various file formats—including emails, receipts, and images. This data is then automatically input into an Employee Deduction form and Equipment Allocation report. Automating this process has enabled Snappy Kraken to save their clients time and labour costs while simultaneously keeping as many as 500 employee equipment records up to date.

Try our Employee Onboarding Wrkflow for yourself

1 https://hubs.li/Q015J-mb0

Accounts Payable and Receivable

Accounts payable and receivable are critical to maintaining smooth business operations, but they have traditionally been time-consuming, expensive, and plagued by human error. Automation is therefore becoming an essential part of Finance teams'[1] cash flow management processes, unlocking new levels of productivity while also drastically reducing the risk of mistakes. In the bigger picture, this not only leads to greater efficiency in finance operations, it also translates to more accurate financial insights and better business management.

Our Accounts Payable and Receivable Wrkflow[2] streamlines cash flow management for Finance teams by automating virtually every step in invoice processing. From invoice acquisition through scheduled emails and reminders, to importing invoice data into spreadsheets and finance software, to checking the numbers for any errors, to scheduling payments or follow-ups.

To better understand how this Wrkflow is put into action, let's take a look at how our delivery platform receives and cross-checks incoming invoices for more efficient and error-free cash management.

Our Wrkflow is designed to receive, categorize, and assign invoices. Invoice data (from PDFs and images) is extracted and transferred into financial management software programs like Sage, where it can be stored and monitored. To ensure the accuracy of invoices, our Wrkflow compares and matches invoice data to purchase orders (POs) or receipts saved in Google Drive. If the numbers match up, the invoice is approved and a note is automatically generated in Sage; if there is a discrepancy, an alert will be sent through Zendesk for a manual follow up. Approved invoices are finally sent to the assigned member of the Finance team for payment processing. All these actions are triggered automatically by the receipt of a new invoice, saving Finance teams a significant amount of time and ensuring that businesses stay on top of their cash flow numbers.

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Try our Accounts Payable Wrkflow for yourself

1 https://hubs.li/Q015J--g0
2 https://hubs.li/Q015J_sH0

Client Reporting and Document Automation

Finally, we all know that pulling and synthesizing data for client reporting has traditionally been a time-consuming but necessary job. With an integrated automation tool, however, client reporting can be transformed into a more efficient and accurate process. Our Client Reporting Wrkflow,[1] for instance, extracts data from different sources, like LinkedIn Campaign Manager and Twitter Ad Manager, and automatically plugs relevant metrics into a report template. This enables you to easily present up-to-date data points to your clients, while also giving your teams more time to understand and digest the numbers in a broader context.

This Wrkflow[2] can also be programmed to compare performance metrics and statistics with a previous period, which is valuable to your clients for understanding how a campaign is performing over time and to transparently demonstrate your business' continued value and ROI.

It's not only Client Reporting that can benefit from this type of generative Wrkflow. As one of our clients, Penny Appeal[3], demonstrated, various types of documentation can be automated to achieve greater efficiency. Penny Appeal is a global relief and development organization with three key areas of focus: hunger poverty, water poverty, and education for orphans. As part of the latter, the organization has a program called OrphanKind, which pairs orphaned children with donors from around the world to sponsor meals, education, and more.

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1 https://hubs.li/Q015K17H0
2 https://hubs.li/Q015JT5l0
3 https://hubs.li/Q015K26s0

How We Wrked for

Our Delivery Platform enabled Penny Appeal to speed up the process of creating profiles for the program's orphans, shortening the turnaround time for finding sponsors and providing them with much-needed resources.

Automating this specific process has enabled Penny Appeal to generate as many as 66 profiles in two weeks; it has also freed up substantial hours for the organization's staff, allowing them to focus their time on more valuable initiatives

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Try our Client Reporting Wrkflow for yourself

1 https://hubs.li/Q015K2YW0

Wrkflows That Work for You

While the 5 Wrkflows covered in this eBook are unique, they do possess a common thread in terms of how they enable revenue leaders to achieve their monthly, quarterly and annual goals more efficiently. This is not an accident. Our Wrkflows are designed to deliver tangible work for your teams to support their collective efforts and free up time for them to focus on high-value tasks and responsibilities.

If you would like to learn more about Wrk, then why not book a demo with one of our automation specialists today and see for yourself how simple it can be to achieve increased revenue.

See how our Revenue Wrkflows can work for you

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