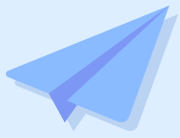




# Automation for the People

Discover how simple  
automation can be with Wrk



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# Glossary of Terms

## **Application Programming Interfaces (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.

## **Hybrid Automation**

Hybrid Automation refers to the unique nature of the Wrk platform—a platform that pairs humans+machine technology to create optimal automation results for your organization.

## **Robotic Process Automation (RPA)**

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

## **Wrk Action**

A simplified bot 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.

## **Wrkflow**

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

## **Wrkflow Builder**

A key feature in the Wrk platform, Wrkflow Builder is where Wrk Actions can be dropped to form automated Wrkflows. The Wrkflow Builder provides you with the scope to scale and repeat the critical workflows.

## **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.



## Executive Summary

In recent years, automation has quickly moved from being a nice-to-have to a must-have for many business leaders looking to add efficiencies to their business, empower their team to be more productive, and achieve ambitious company culture goals. And all the trends point to automation becoming increasingly prominent in the coming 5 years and beyond.

However, despite the significant uptick in automation-adoption recently, many business leaders of both emerging and enterprise-level organizations are still unclear about how automation can work for them. Others are perturbed by the perceived high costs of entry, while some management teams in certain industries, like healthcare or pharma, remain skeptical about whether or not automation can handle the often complex and sensitive nature of their internal and external processes.

In this eBook, we aim to address these concerns by giving you a detailed overview of our Hybrid Automation platform. You can expect department-specific use cases showcasing how automation can work for your teams from Marketing and Sales to Customer Support and Finance. We also provide a step-by-step overview of the Wrk platform so that you can explore the simplicity of our foundational blocks for yourself. Finally, our team's leaders outline why they built Wrk, the lessons that we as a company have learned to date, and our vision of an automation-empowered future of work.

# A year like no other

**As a company that launched just before the COVID-19 pandemic sent us all into lockdown, it is fair to say that we have found ourselves adapting to new and rapidly-changing situations quite regularly since then. Of course, this uncertainty has been mirrored across society with many organizations being forced to pivot their entire business model in a matter of weeks to adjust to the new realities of doing work during a global pandemic. One of the key by-products of this shift has been an acceleration in automation-adoption for companies dealing with a new reality of a remote workforce, online strategy meetings, and global conferences held on Zoom.**

According to a 2020 study from Deloitte<sup>1</sup>, “68% of business leaders used automation to respond to the impact of the COVID-19 pandemic”. This is a sentiment shared by Microsoft CEO Satya Nadella<sup>2</sup> who, in May 2020, stated that his company had seen “two years of digital transformation in just two months”. The

upward trajectory in automation-adoption looks set to continue as we move into the post-pandemic world as more businesses look to find innovative solutions to unprecedented challenges.

However, for many business leaders, automation remains a black box with more questions than answers. From concerns about pricing to uncertainties about implementation, there are many genuine roadblocks for businesses looking to add automation to their business’s processes but are unsure where to begin. Wrk was built to simplify this process. Our automation platform is designed to find lasting solutions to your most common pain-points. So, whether you want to reduce friction between your Sales and Marketing teams or expedite your lead generation processes, Wrk can help.

**Let’s get started!**

1 <https://www2.deloitte.com/uk/en/pages/press-releases/articles/two-thirds-of-business-leaders-used-automation-to-respond-to-the-impact-of-covid-19.html>

2 <https://www.turningcloud.com/blog/accelerating-cloud-adoption/>



# **Empower your organization with automation**

**Wrk combines RPA, APIs, proprietary bots, and a real human workforce into a single platform<sup>1</sup>—giving you the benefits of each solution, with none of the limitations. Similarly, our intuitive Workflow Builder<sup>2</sup> gives you the freedom to create workflows that match your internal processes to a tee. Finally, our transactional pricing plan means that you can start small and expand your**

**automation-adoption at your own pace without any fixed costs or year-long contracts to worry about.**

But what does this look like in practice? Unpack the answers to these 3 questions to get a better idea of why our platform is designed the way it is and how it can help you simplify the delivery of work for your team today.

## How does your automation work?

At Wrk, we have decided to tackle the automation question from the bottom-up<sup>3</sup>. We start with the problem (your pain-point) and work back from there to reverse-engineer a solution that works for you. The flexible and easily-integratable nature of the platform allows us to do this by breaking down every step of your workflow into a series of simple steps—we call this microtasking. This could include tasks such as sending an email or translating a document from Arabic to English. Each task is then delegated to either a human or automation tool depending on its complexity.

## How will you help my business?

If you are reading this then the chances are that you are looking for a solution to the time-consuming tasks that are eroding your team's productivity and affecting your bottom line. Regardless of the industry that you're operating in, wasting your team's collective skill-set on repetitive tasks that could be delegated to an automation platform is a mistake. Stop making it. By combining humans' unmatched critical thinking, conversational abilities, and creativity with bleeding-edge technology, we blur the lines between human and automation, making expensive and complex technology more accessible to all.

## Microtasking—what's that?

We fully believe that any business process, either wholly or in part, can be broken down into repeatable micro-tasks. Our platform is devoted to breaking down these important yet time-consuming processes into simple, repeatable units that we call Wrk Actions. Through our expansive library of Wrk Actions and the parallelization of tasks, we can speed up the delivery of work without sacrificing any quality. This means you can strategize and scale safely in the knowledge that the work you send our way will be delivered on time and under budget.

<sup>1</sup> <https://wrk.com/wrk-platform/>

<sup>2</sup> <https://wrk.com/platform-features/>

<sup>3</sup> <https://wrk.com/wrk-platform/>



## Mohammad El-Barachi: CEO & Co-Founder

“The automation ecosystem is vast, with a range of diverse solutions available. However,

**one common problem that we saw again and again when designing Wrk was that there were far too many barriers to entry for organizations eager to adopt automation but unsure where to begin.**

Wrk solves this problem by replacing high start-up costs, rigid implementation processes, and overly-complex terminology with a transactional pricing structure, an easy-to-use platform centred around your business needs, and relatable, real-life use cases that shows how automation can work

for you today. So, if you are interested in automation but confused about the difference between RPA and APIs, worried about the start-up costs for machine learning, or at a loss about how much time it will take to enact a full digital transformation, we can help.

Our platform is designed to simplify the scaling and repeatability of your internal organization. We do this by identifying your internal pain-points (it could be anything from laborious lead generation processes or time-consuming data annotation tasks), breaking down each step of the process using our patented Wrk Actions<sup>1</sup>, and then creating a tailor-made Wrkflow<sup>2</sup> that is designed solely with your desired outcome in mind. It’s really that simple.”

1 <https://wrk.com/wrk-actions/>

2 <https://wrk.com/wrkflows/>



# Democratizing the Workplace

**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. From transcription and translation to something as simple as making a phone call, the collective skill-set of our Wrkforce means we can guarantee the seamless delivery of work for our clients—a goal that is not always achievable with other automation providers.**

As well as efficiently completing a range of vital tasks, our Wrkforce's most experienced members are also responsible for supervising tasks completed by both their fellow Wrkers as well as our range of automation tools. This two-step verification is invaluable to our platform's overall effectiveness, especially when it comes to the delivery of high-quality work for a fair and transactional price.

The great thing about this for our clients is that they don't have to worry about whether their Wrkflow will be completed by one of our very own bots or a human member of our Wrkforce. Depending on the complexity of the task, our platform can automatically decide whether it should be completed by a human, an automation machine, or even a combination of both. All that you need to worry about is deciding how you will maximize the extra time you and your team are going to have as a result of using Wrk.

## Did you know

**“According to McKinsey<sup>1</sup>, the United States and India stood out when it came to automation-adoption in 2020, with 83% of executives surveyed in the United States, and 70% of executives surveyed in India, reporting faster adoption of automation.”**

1 <https://www.mckinsey.com/featured-insights/future-of-work/what-800-executives-envision-for-the-postpandemic-workforce>



## David Li: Chief Operations Officer & Co-Founder

“When Mo and I first started to think about Wrk, we were certain that for our automation platform to be truly successful, we needed to ensure that human input was a central part of the process. For us, the relationship between machines and humans is both reciprocal and mutually beneficial. In other words, one doesn’t flourish without the other. Unfortunately, in the automation landscape at that time, and even today, this isn’t always evident.

Typically, the main players in the automation space put machines first, with humans largely seen as a stepping stone to be disregarded once their particular task was done. Wrk was born out of a desire to turn this perception on its head and this is what we are striving to do with our

pioneering Hybrid Automation platform. We fundamentally believe that automation can only be truly sustainable when machines and humans co-exist.

Ultimately, we believe that human ingenuity, individuality and creativity<sup>1</sup> need to be elevated at the same pace as automation in order for it to achieve its full potential. Yes, automation technology enables us, as humans, to expand our capabilities but we have the potential to shape this cutting-edge technology so that it delivers more exhaustive and longer lasting solutions for our clients. Our hybrid platform blends the best of both worlds effortlessly to deliver important yet repetitive work so business leaders like you can focus on what really matters.”

1 <https://wrkforce.wrk.com/our-story/>

**How can  
we help?**

**Like most things in life, the best way to tackle a complex task is to take it one step at a time. That's exactly the strategy we take at Wrk. And for each step of the process, we have a corresponding Wrk Action. These powerful Wrk Action bots are designed to automate a wide range of jobs, from adding a folder to Dropbox to generating custom emails.**

Our Wrk Actions are also designed to be used in combination with each other: users can simply drag and drop various Wrk Actions together to create a Wrkflow. These can be fully customized to match your business needs and can be easily integrated into existing processes and platforms, like Google Calendar, Basecamp, Salesforce, Hubspot, and many more.

For those new to the world of automation, we also offer a range of preset Wrkflows, which businesses can implement on a moment's notice to streamline how various departments operate, from marketing to human resources. These preset Wrkflows are informed by our extensive knowledge of business processes and formulated to facilitate and simplify many of the tasks that businesses—big and small—undertake on a regular basis. Our existing Wrkflows include automated payroll setup, lead nurturing, ticket resolution, and invoicing, among several others.

But what good is an automation solution without a user-friendly interface? Our Wrkflow Builder and Client Dashboard<sup>1</sup> enable our users to easily navigate our automation tools and implement tailored or preset Wrkflows. Automating your business processes is quite literally as simple as drag n' dropping icons into our Wrkflow Builder. From there, we bring your automated Wrkflow to life. All you have to do is watch as seamless automation transforms your business for the better.

To provide as much transparency as possible, our Client Dashboard updates users on the effectiveness of each Wrkflow's performance. Successful Wrkflows can then be scaled as necessary, while others can be tweaked until they're just right.

## Did you know

**“Workplaces are actively reinventing their operations<sup>2</sup> to minimize health risks to workers and customers. Many businesses have shifted to remote work, which has necessitated the further digitization (and automation) of their workflow.”**

<sup>1</sup> <https://wrk.com/platform-features/>

<sup>2</sup> <https://www.cigionline.org/articles/covid-19-will-accelerate-automation-and-we-must-embrace-it/>



## Rob Britton: Senior Director of Technology

“When designing a platform as ambitious as ours, there really is a lot to consider.

However, from day one until now, the one goal that has remained constant has been the desire to keep our clients’ needs at the forefront of every decision we make. This solution-focused approach means that you as a user can expect the following high-quality as standard when you use Wrk:

You can choose your level of automation, and then take advantage of our seamless integration between humans and machines to avoid hiccups at the transition points.

You get access to advances in automation technology automatically as we add them in. This allows you to take advantage of both current state-of-the-art automation technology, as well as future advances as they get developed. All without needing to bring in automation experts to help.

You can easily scale up and down as needed. No need to worry about building infrastructure or hiring more people—like the cloud, but for work.

Our client-focused approach to automation has impacted every aspect of our engineering processes to date, from our release engineering strategies<sup>1</sup> to our unique coding process. And rest assured, every iteration to our platform moving forward will also be designed to ensure maximum simplicity for our users.”

<sup>1</sup> <https://wrk.com/how-does-wrk-push-every-day/>

# Simple solutions to perennial problems



Automation is changing the face of business operations, enhancing and streamlining everything from recruitment and hiring to tax preparation and lead generation. And while there has been buzz about the technology for some time, the latest automation solutions, like ours, are built to fit seamlessly into existing workflows. No longer do companies have to overhaul their processes to adapt to automation: Our simple automation adapts to your business and its specific needs. In other words, our versatile platform is accessible to all users across all departments. Let's take a closer look at how Wrk can transform the day-to-day of various departments and empower your teams.

## Marketing

**Automation is increasingly becoming a staple in the modern marketing toolbox: in 2019, 75% of companies<sup>1</sup> were already using automation to boost their marketing operations. Looking at the big picture, marketing automation is vital to freeing up time and resources for your marketing team so they can focus on new strategies and stay ahead of marketing trends.**

How does marketing automation free up so much time? It's simple really. By automating many of the daily tasks that typically eat up valuable hours, Marketing teams<sup>2</sup> can dedicate their skills to coming up with new marketing tactics, keeping an eye out on the competition and, perhaps above all, remaining agile in the face of fluctuating trends. Aspects of the job, like telemarketing and market research,

can be automated using our marketing Wrkflows, giving teams the insightful data they need—without the legwork.

Increasingly important marketing avenues, like email outreach and social media advertising, can also be automated using our platform. And don't worry, automation doesn't mean losing the personal touch. On the contrary, what makes Wrk great is that it can be programmed to generate custom emails that take into account who the customer is, where they are in the pipeline, and what products or services they are interested in. With automated ad creation, businesses can streamline the labour-intensive versioning process so that all creative assets are properly formatted and updated as needed. With automation at their fingertips<sup>3</sup>, there is no limit to what your Marketing team can do.

<sup>1</sup> <https://startupbonsai.com/marketing-automation-statistics/#:~:text=Three-quarters%20of%20all%20companies,kind%20of%20marketing%20automation%20tool.>

<sup>2</sup> <https://wrk.com/marketing-hub/>

<sup>3</sup> <https://wrk.com/marketing-hub/>



# Customer Success

**Maintaining a healthy Customer Success department is essential to a thriving business. And today, automation is enabling companies to set a new standard in customer success by putting client relationships back at the forefront. On a more specific level, Wrk's simple automation solution can streamline many customer success tasks, especially the more mundane ones, giving your team the time needed to connect with and nurture customers.**



Our Customer Success Wrkflows cover everything from client onboarding to customer retention, utilizing RPA and API processes to gather and organize customer data, prompt and monitor customer feedback, and engage with customers through personalized product updates.

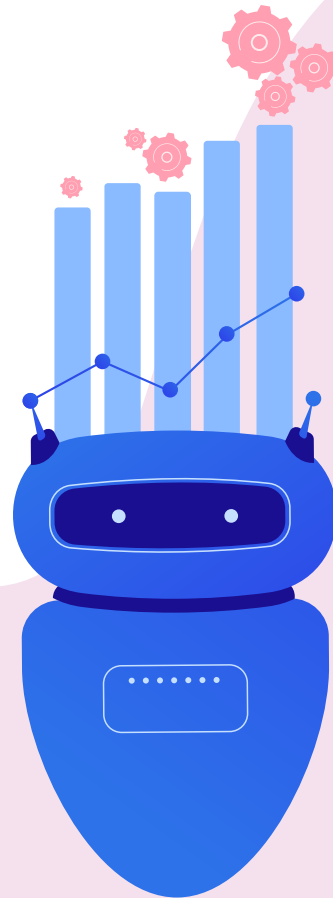
Client reporting, a vital but often daunting task for Customer Success teams<sup>1</sup>, can be dramatically streamlined by automating client surveys and feedback, as well as data analysis. In other words, rather than have your Customer Success team spend hours sending out surveys and manually compiling the data, our seamless automation platform takes care of everything and presents your team with a comprehensive report filled with actionable insights. Ultimately, automation gives your team the tools to understand their customers, stay connected with them, and keep them satisfied.

<sup>1</sup> <https://wrk.com/customer-success-hub/>

# Sales

**In many ways, sales processes are incredibly hands on, relying on interpersonal relationships and continual lead sourcing. Despite this, there are many ways automation is improving how Sales teams operate, bolstering their customer-facing activities from behind the scenes.**

Our seamless automation platform offers bespoke Wrkflows for various sales tasks, such as lead nurturing, sales data and list management, deal management, and quote and proposal development. These tools are designed to keep Sales teams up-to-date on all customer relationships as well as to ensure that those in the sales pipeline are not slipping through the cracks and are receiving relevant, personalized engagement.



The platform we have built here at Wrk can automate time-consuming tasks like lead scoring by parsing information about the lead. This includes how they've engaged with your business, what information they've shared, and more. Rather than analyze the data themselves, Sales teams<sup>1</sup> will be presented with digestible lead qualifications, giving them the insights they need to focus on the highest value leads. According to a recent survey, companies utilizing high-level sales automation generated roughly 16% more leads<sup>2</sup> compared to those with no or little automation. At the same time, automated lead nurturing helps to convert these leads into sales: over three quarters<sup>3</sup> of companies reported increased conversions with sales automation.

<sup>1</sup> <https://wrk.com/sales-hub/>

<sup>2</sup> <https://komarketing.com/industry-news/study-high-growth-marketers-more-likely-to-have-mature-automation-in-place-4358/>

<sup>3</sup> <https://startupbonsai.com/marketing-automation-statistics/>

# Human Resources

**The rapid rise of remote work recently has presented distinct challenges to Human Resource departments. High-touch aspects of the job like recruitment and employee onboarding are increasingly being done virtually, forcing HR teams to grapple with new questions like how to find, train, and engage with employees online. Fortunately, this shift is being facilitated by automation, which can streamline many HR tasks<sup>1</sup>, giving teams the freedom to focus their energy on people rather than admin and online logistics.**

Our HR automation Wrkflows are designed to streamline many tasks, such as recruitment, employee onboarding and offboarding, timesheet management, and claims and request processing. Looking at recruitment and hiring practices alone, automation can save HR teams substantial time by filtering resumes and ranking them based on various criteria. This makes a big difference considering that recruiters can spend up to 23 hours evaluating resumes<sup>2</sup> for a single position.

When it comes to employee onboarding, Wrk can automate various steps, like welcome emails, account or profile creation, and benefits enrolment. This leaves more time for your HR professionals to address specific questions a new employee might have and focus on integrating them into your work culture.



1 <https://wrk.com/human-resources-hub/>

2 <https://ideal.com/3-ways-recruitment-automation-will-change-recruiting-forever/>

# Finance

Finance, perhaps more than any department, is tasked with both big picture financial strategies as well as repetitive, detail-oriented work, like payroll, accounts payable and receivable, and tax preparation. On top of that, the more fastidious finance tasks directly influence the big picture planning, meaning that margins for error must be slim if not zero.



## Did You Know:

**“A 2020 study from McKinsey<sup>3</sup> tells us that 88 percent of finance and insurance executives and 76 percent of information and technology executives reported increased implementation of automation and AI since the outbreak.”**

Our seamless automation platform not only simplifies many day-to-day finance duties, but also eliminates the possibility of human error in bookkeeping. Our Finance Wrkflow for Accounts Payable, Receivable & Invoicing is helping Finance departments<sup>1</sup> to digitize and streamline what has traditionally been a very paper-heavy process. Invoice procurement, number checking, and department approvals can all be automated, so that Finance teams no longer have to spend valuable hours chasing after and double checking invoices and receipts. Naturally, time saved leads to money saved: businesses can cut invoice processing costs by up to 80% using automation<sup>2</sup>.

Other Wrkflows, like Payroll Setup and Tax Preparation & Management can simplify finance operations further, reducing your team's chore list while simultaneously sidestepping any clerical oversights or potential bookkeeping errors.

1 <https://wrk.com/finance-hub/>

2 <https://www.levvel.io/resource-library/the-increasing-roi-of-spend-management-automation>

3 <https://www.mckinsey.com/featured-insights/future-of-work/what-800-executives-envision-for-the-postpandemic-workforce>

# Customer Support

**Customer support today looks very different than it did even a decade ago. Providing a help line will no longer cut it: customers expect to communicate with businesses via their preferred channels, whether it's by phone, email, chat, or social media. Our platform is designed to empower your Customer Support team so that they can continue to give customers top-notch support across these various channels without being stretched too thin.**

Wrk integrates seamlessly with existing customer support software, so that Customer Support teams can access and manage all customer tickets and correspondence from a centralized hub. This means that no matter how your customer reaches out, they'll get the same level of care and priority.

Moreover, our customer support automation<sup>1</sup> offering includes Wrkflows for ticket resolution, password resetting, review management, and ticket routing

and escalation, among others. These easily integrated tools will not only help your Customer Support teams to manage incoming customer queries and reviews but also to address them. For instance, responses to FAQs can be automated, as can password resetting requests. Streamlining these types of customer interactions will allow your team to focus on more complex customer issues and, ultimately, help to boost customer satisfaction.

Ultimately, our platform gives your teams the support they need to keep up high levels of productivity while also maintaining a healthy work culture. Our Wrkflows are designed to save your team's time and resources by handling many necessary but often mundane tasks, freeing them up for more engaging, human-centered work. As we'll see in the next chapter, we at Wrk are focused on more than just digitizing and automating processes: we are fully invested in transforming how people work.



<sup>1</sup> <https://wrk.com/customer-support-hub/>

# Practicing what we preach



## Kelsea Gust: Director of Marketing

“As Director of Marketing for Wrk, I am immensely proud of what we have achieved in such a short time. In terms of developing our brand, evolving our platform, and building a genuinely inclusive company culture, I feel very lucky to be contributing to an organization that really does practice what it preaches when it comes to simplifying work in a digital-first world.

However, for me, it's vital that our automation platform is more than just a cost-saving measure for the business leaders who use it. Don't get me wrong, providing cost-effective solutions to organizations was one of the key reasons why we started Wrk, but it's not the only one.

The truth is that automation has the potential to assist teams of all sizes and across all industries with more intangible goals like reducing employee burnout<sup>1</sup> and increasing team morale—goals that are vital to a remote-first workplace. We have used automation to simplify both how we work and why we work since day one. Here's how:”

1 <https://wrk.com/reduce-employee-burnout-add-simplicity-automation/>

## Using automation to tell our story

“First off, as a Marketing team, we made sure that whatever repetitive tasks that could be automated, were automated. This included important yet time-consuming aspects of our search engine optimization (SEO) checklist for blog posts, as well as social media scheduling and marketing lead qualification. By using automation to take care of tasks of this nature, our team has had the time and energy to pursue more ambitious brand-focused goals that have ultimately helped us achieve our target of bringing our story to as wide an audience as possible.”



## Picking the low-hanging fruit

“Deploying our Wrkflows internally to allow cross-functional teams to increase productivity and to cater to our clients’ needs more effectively has been extremely rewarding. Taking advantage of the so-called low-hanging fruit within our organization has allowed us as an organization to focus more on developing and evolving our platform—a feat that would not have been possible if we were occupied with repetitive, time-consuming tasks. In my view, this is just the tip of the iceberg of what we can do for organizations’ internal and external needs.”



## Connecting with colleagues

“Finally, as important as this growth has been, it is not the only metric of success that I use to evaluate our organization’s development during the past 12 months. Personally, I have found third-party automation tools like Officevibe and Donut to be extremely helpful in creating a strong sense of company culture and camaraderie for a remote-first organization with team members dotted across North America. It’s no secret that 2020 was a trying year for all of us and being able to connect with colleagues, even over video call, allowed me to get to know my teammates better and to understand their needs as individuals.”







## Simplifying the future of work

While it is clear that automation is going to play an increasingly important role in the future of work, what that future looks like remains to be seen.

At Wrk, we are eager to make automation as simple and straightforward as possible for business leaders looking to add immediate efficiencies to their organization. That said, we know that automation has the potential to be so much more than a quick fix solution—it can completely revolutionize how you work.

**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 automation can be.**

**Book Your Demo Today**

## About the Authors



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