RevOps Your Engine:

Drive Digital Transformation with Hybrid Automation

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Glossary of Terms

Digital Transformation
While digital transformation may be slightly different in every organization, it can largely be defined as the integration of digital technology into all areas of a business resulting in fundamental changes to how businesses operate and how they deliver value to customers.

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.

Customer Relationship Management (CRM)
Salesforce defines CRM as a technology for managing all your company's relationships and interactions with current and prospective customers.[1]

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.

1   https://www.salesforce.com/ca/crm/what-is-crm/

Executive Summary

From time-consuming admin tasks and crucial lead management efforts to client onboarding and reporting, the range of responsibilities that can be enhanced with an integrated digital transformation strategy is seismic. What's more, the integration of industry-leading tech solutions has the capacity to completely redefine an organization's operational culture and enhance how its offering to clients.

In pursuit of such a seamless digital transformation strategy, many organizations have amalgamated internal operations teams to create the increasingly impactful Revops role. In turn, a growing number of Revops teams are turning to automation to achieve this overarching digital transformation goal. However, with so many automation tools and solutions to choose from, it can be challenging to know where to start.

In this eBook, we explore the important role automation plays in your digital transformation journey, outline why our Hybrid Automation platform is perfectly suited to be the engine to help your organization complete its digital transformation journey as smoothly as possible, and provide tangible examples to show how Wrk's unique Wrkflows have helped ambitious teams just like yours outperform their revenue and operations goals by optimizing resources.
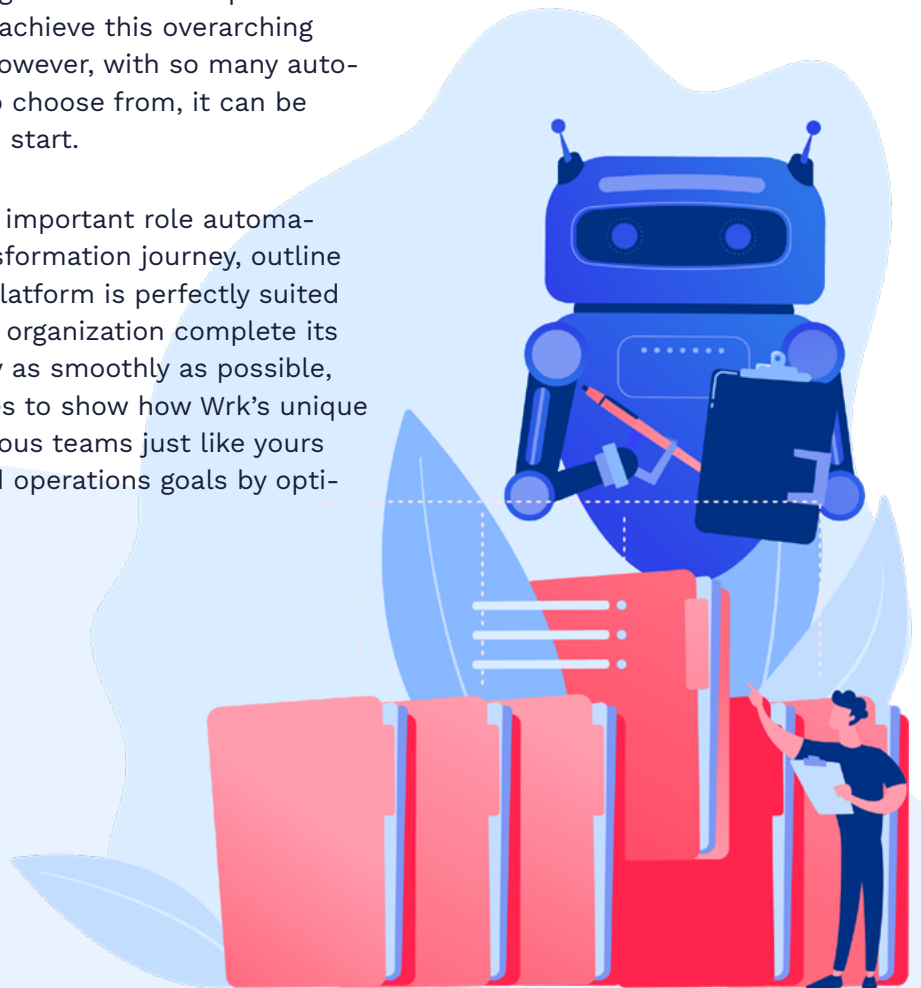
Introduction

When it comes to recent buzzwords in the tech space, few have matched the universality of digital transformation. From webinars and panel discussions to eBooks and reports, the combined column inches devoted to this term has exploded in the past 5 years and it's easy to see why. According to a Gartner's CIO Survey, CIOs expect 77% of their business processes to be completely digital within 5 years[1]. Factor in the shift towards remote work and digital-first operational systems in the vast majority of organizations right now and it is clear to see that maintaining the status quo is simply not an option for ambitious organizations.

However, while there seems to be consensus on the importance of digital transformation amongst organizations of all sizes, the reality is that precisely defining what digital transformation is and what its implementation looks like across key internal departments is less clear.

OK, so what is digital transformation?

While finding a single definition of what digital transformation may be akin to getting consensus on the meaning of life, the reality is that most agree that it is the process that involves the integration of digital technology into all areas of a business so as to fundamentally change how it operates, and then deliver value to customers.

So, we have defined digital transformation and can acknowledge the game-changing role digital technologies are playing in the modern-day organization, but what about its implementation. How will it affect my existing operational structure and what has that got to do with automation? Two great questions!

To help answer them, we have divided this eBook into three primary sections: Marketing, Sales, and Customer Success. These three departments, combined with the burgeoning Revops role in many new organizations, are some of the most vital for organizations looking to move into a digital-first environment.

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1 https://www.gartner.com/imagesrv/cio/pdf/cio_agenda_insights_2016.pdf

Scaling marketing for sustained success with automation

As the marketing technologies landscape continues to expand, Hybrid Automation can help turn B2B marketing into an efficient workhorse for your organization. It enables marketers to focus on strategic work and higher value initiatives instead of spending hours monitoring and updating spreadsheets.

Marketing ops experts help manage marketing technologies to deliver quality leads to their colleagues in marketing and sales at the earliest possible opportunity. And as you know, time is of the utmost importance in this game. According to a study by Lead Connect, 78% of new business goes to the first responder. Driving scale can be impossible if your Marketing team is relying solely on manual ways to manage thousands of leads—this is where marketing automation can help. Some of the challenges that marketing automation platforms like Wrk can help alleviate include lead list management, formatting the leads list before uploading, sending multiple campaigns, developing custom reports, generating bulk website listings, and so on. It's a cliche but the possibilities really are endless!

Let's look at them in more detail now.

Did You Know

78% of new business goes to the first responder.

EMAIL LIST UPLOADS AND MARKETING DATA SYNC

Marketing operations experts regularly upload multiple lead lists from varied sources on their marketing automation platform. Unfortunately, lead lists from digital events, content syndication platforms, external ad campaigns and other sources are rarely uniformly formatted and to make matters worse they also frequently contain errors and duplicates. The harsh reality is that bad data cumulatively costs companies approximately $3 trillion per year[1]. Furthermore, some studies have shown that the cost of bad data is an astonishing 15% to 25% of revenue for most companies. It creates delays and requires hours of manual work to reformat[2]. The time wasted further delays marketing and sales follow-up to the expensive leads which makes them unlikely to convert.

Wrk's unique Hybrid Automation can handle the lead list cleaning and uploading process seamlessly, making it faster and error-free while ensuring consistent data across all of your platforms. In addition, by combining the best of API technology with a skilled and engaged Wrkforce, it can sync your lead data from multiple sources automatically into your CRM platform to give all teams a 360° view of leads—thereby fostering greater allocation and prioritization of resources. Our Wrkflow can also migrate data to your marketing automation or CRM instance without any delays. It also helps standardize data and processes across multiple CRM platforms ensuring your leads data, customer data, and other information is constantly being updated. Automated lead management enables quick marketing follow-up and ultimately creates space for your Marketing team to focus on strategizing, segmenting, and pursuing higher-value initiatives.

Did You Know

Bad data cumulatively costs companies approximately $3 trillion per year.[1]

1   https://hbr.org/2016/09/bad-data-costs-the-u-s-3-trillion-per-year
2   https://sloanreview.mit.edu/article/seizing-opportunity-in-data-quality/

LEAD ENRICHMENT

A mammoth challenge in lead management is insufficient data. It is quite a similar situation when captured leads have insufficient or incorrect data. The result of this practice leads to Marketing teams investing significantly in acquiring potentially valuable leads and then being unable to follow up with those leads because they don't have all the relevant information like phone numbers or emails.

Wrk's process automation can help you automatically populate a lead's information such as their job title, company name, phone number, social media profiles along with its company's particular details such as web traffic, latest round raised (if applicable), employee growth, and so on. The additional information can help in further lead qualification and segmentation. Even though a lot of marketing specialists use a combination of data enrichment services to keep their database updated, it is costly and still difficult to import the enriched data from them into other marketing applications, which becomes an exponentially larger problem with scale. That's why marketers now often prefer to use an automation tool to enrich the leads automatically.

IN FOCUS: MARKETING REPORTS AND COLLATERAL

Marketers and digital agencies need to continuously prove the effectiveness of their campaigns to numerous stakeholders and regularly produce multiple variations of content. However, building weekly and monthly reports along with content creation can be very time-consuming as Marketing teams often need to extract data from multiple sources and find the relevant information which shows the results in the best light.

With Wrk, marketers are now able to innovate and automate unique processes and tasks which pull them away from focussing on their best creative initiatives. Wrk's Hybrid Automation platform helps create automated custom reports for agency customers as well as for internal reporting. Weekly, monthly, or quarterly multi-channel marketing reports can be customized as per the needs of stakeholders saving them days of manually pulling data from multiple sources. It also helps create templatized brochures, ad copies, decks for events and campaigns which helps drive scale.

See how our Wrkflows can help transform your marketing processes on the next page.

Automation in Action

MARKETING REPORTS

Wrk automation delivers customized weekly and monthly performance reports that your team members and customers will look forward to reading. It extracts data from multiple sources, showcases monthly and quarterly KPIs and easily proves ROI.

👍 Cost efficiency
🕐 Saving hours of labour
💎 Staff moved to higher value initiatives

INFORMATION BROCHURE

Wrk's brochure automation helps our NGO customers create branded profiles rapidly for their sponsorship programs. It automatically extracts information from excel sheets, pulls images from Google Drive, and delivers personalized profile documents in PDF format saving hours of work and increasing scale to help more children.

👥 130 Profiles created/month
🕐 Client time saving
✈ Deplete backlog

RESEARCH REPORTS

This Wrkflow helps conduct customized automated research required for new feature launches or simply to keep up with the industry trends. It saves marketers from updating Excel sheets manually and helps scale their efforts with automated scraping and our tech-empowered Wrkforce.

⬆ Increased cost-efficiency
🕐 Saving hours of labour
💎 Staff moved to higher-value initiatives

Explore Our Marketing Wrkflows
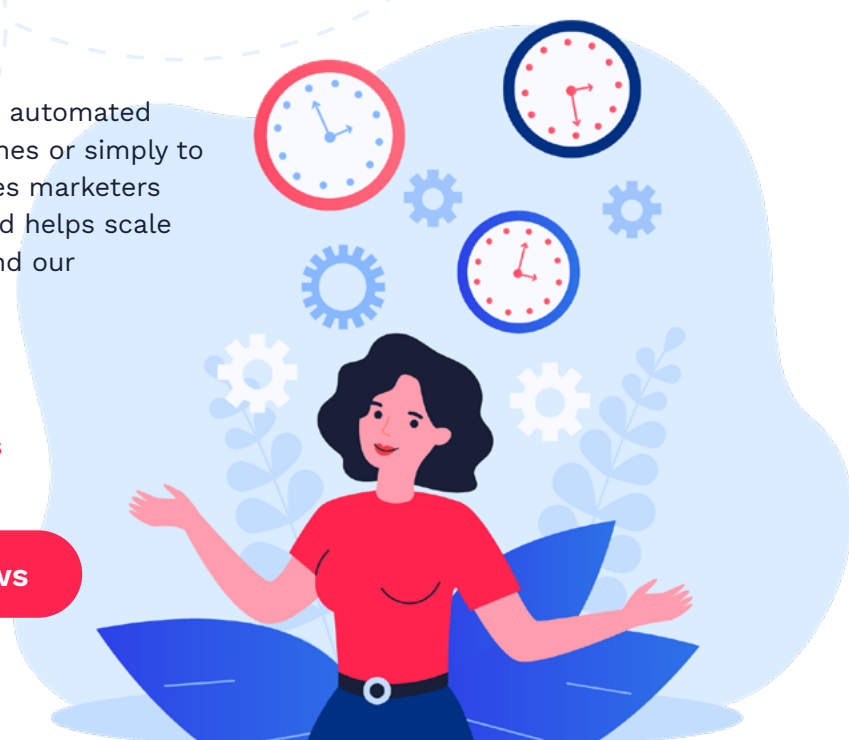
Automation is putting sales back at the forefront

The case for sales automation is clear: as McKinsey reports, early adopters of sales automation have experienced increases in customer satisfaction and efficiency as well as sales growth potential of up to 10%[1]. Less obvious are the specific ways in which automation can transform sales processes. To demystify this, here are the areas your Sales teams can boost efficiency by implementing automation, from lead management, to deal handling, to cross-selling, and beyond.

ADMINISTRATIVE TASKS

From the outside, sales might seem defined by client meetings, sales pitches, and deal closings. The reality is quite a bit different. Only about a third of a salesperson's time is actually spent selling: much of the rest is dedicated to administrative tasks, including sending emails, scheduling meetings, and data entry[2]. Fortunately, automation solutions like Wrk are tipping the balance in favour of selling, automating a plethora of sales admin duties so Sales teams can focus more on converting leads.

For example, Wrk can be integrated with HubSpot Deals to streamline administrative tasks that pop up along the sales journey, including automatically sending out updates via email or scheduling a meeting when a certain stage of a deal is reached. Our solution can also be used to boost the efficiency of internal processes, like invoicing and document processing, as well as contact reformatting and merging for up-to-date CRM.

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1   https://www.mckinsey.com/business-functions/marketing-and-sales/our-insights/sales-automation-the-key-to-boosting-revenue-and-reducing-costs
2   https://blog.hubspot.com/sales/how-salespeople-learn?_ga=2.118643593.1093041507.1614094355-731072522.1614094355&__hstc=42243066.8e24908cb
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Automation in Action

IN FOCUS:
LEAD MANAGEMENT

Lead management has traditionally been incredibly time-consuming. This is not for nothing: lead generation, qualification, and nurturing are vital to sales, ensuring that new customers are actively being sought and prospects are not only properly evaluated but are being dealt with with care and consideration. Because of this, lead management will always need the human touch. However, that doesn't mean that automation has no role to play.

With Wrk automation, Sales departments can reinforce their existing practices and achieve new levels of efficiency and productivity. Wrk has a variety of lead-centric Wrkflows to automatically attract, enrich, prioritize, and assign leads to your Sales team in a jiffy so they can reach out quickly and focus on conversion.

See how our Wrkflows can help transform your sales processes.

LEAD GENERATION

Wrk's Hybrid Automation can pursue new avenues for lead generation using platforms like LinkedIn and Crunchbase. It can extract contact details from websites, competitor sites and find matches using Zoominfo to populate details and send them emails or LinkedIn Inmail messages.

- Increased Sales growth
- New revenue stream
- Saving hours of labour

LEAD ENRICHMENT & PRIORITIZATION

This Wrkflow automatically populates a lead's specific information and monitors key indicators such as revenue increase, employee growth, new funding to flag opportunities in your CRM for prompt follow up.

- Increased sales revenue
- Increased average purchase value
- Boost upsell & cross-sell rates

LEAD NURTURING

Our Lead Nurturing Wrkflow automatically classifies new leads based on criteria in HubSpot. Using advanced automation, the highest-scoring leads are passed on to salespeople, who can focus on the customer journey and, ultimately, closing the deal.

- Higher conversion rates
- Shorter sales cycle
- Satisfied customers

SALES PROPOSALS & QUOTES

A competitive quote and proposal are critical to clinching a new customer or satisfying an existing one. But manually drafting and managing these documents uses valuable time and energy Sales teams could direct elsewhere. Automation gives your team the tools needed to automatically generate quotes and proposals based on customer-specific data. Once shared with prospective customers, automation solutions like Wrk can handle the next steps, like follow-ups, signature acquisitions, and contract approvals.

Using industry-leading APIs, Wrk allows for the seamless integration of Wrkflows with Salesforce, DocuSign, and other sales apps to streamline how your Sales team drafts proposals and finalizes deals. In the end, this will not only give your professionals more time to spend on high-value customer interactions, but it also saves your clients' time—a bonus that cannot be underestimated when building a solid and long-lasting customer relationship.

CROSS-SELLING AND UPSELLING

By facilitating a number of tasks that previously cluttered up your Sales team's schedules, sales automation tools enable sales operation specialists to empower their salespeople to increasingly focus not only on leads and customers, but on innovation. Time and resources are needed to come up with new cross-selling and upselling strategies.

More than that, Wrk's Hybrid Automation platform (aided by powerful RPA technology) can enhance dealings with existing customers to boost the potential for cross-selling and upselling. Automated CRM enables sales teams to keep tabs on customer interactions, as well as purchases or subscriptions. This in turn provides a greater understanding of the wants and needs of individual clients, which helps to identify cross-selling and upselling opportunities.

Explore Our Sales Wrkflows

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Digital transformation drives a new era for customer success

Customer success extends the value of your business beyond the product or service you offer, creating potentially long-lasting customer relationships and high referral potential. It is, therefore, no wonder that companies are now making customer success a top priority[1]. Now, automation is taking customer success capabilities to a whole new level, enabling companies to offer unprecedented support and resources to their clientele without dramatically increasing customer success budgets.

CUSTOMER ONBOARDING

Once Sales teams have turned leads into customers, the work is not over. It is now up to them and Customer Success teams to welcome new clients and make their ongoing experience with your business a positive one. With automation in your toolkit, the customer onboarding process can be formalized and streamlined, offering support and clarity to your new client at every step.

Tasks like scheduling a meeting or sending a welcome message to your new customers, as well as assigning them to a customer success agent, can be automated using Wrkflows. By integrating automation with CRM systems, you can also ensure that your clients are receiving regular and (most importantly) relevant resources from your business. These can help them optimize their use of your service or product all while creating touchpoints to build a strong relationship and boost retention.

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1   https://www.forrester.com/press-newsroom/72-of-businesses-name-improving-customer-experience-their-top-priority/

CLIENT REPORTING

It is no secret that client reporting is an essential part of maintaining customer success, as it establishes a relationship based on transparency and trust and keeps clients up to date on KPIs and other vital information. For many Customer Success teams, however, client reporting is a labourious process that involves extensive data tracking and analysis as well as formatting and presentation. Automating client reporting takes virtually all the legwork out of this process without compromising on customer success.

Our Client Reporting Wrkflow can automatically glean and collect relevant data from various sources and compile them into digestible reports, which can be shared with clients on a weekly, monthly, or annual basis. Reporting can also be customized to the client to ensure they are getting the metrics that are most relevant to them. This is achieved through API integrations with widely used tools like Zendesk, Excel, and Powerpoint. Using automation to streamline client reporting is not only a good way to save time while maintaining good communication with customers, it is also less prone to human-caused inaccuracies and mistakes.

Did You Know

Our Client Reporting Wrkflow can automatically glean and collect relevant data from various sources and compile them into digestible reports, which can be shared with clients on a weekly, monthly, or annual basis.

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TIMELY INTERACTIONS

A big part of an effective customer success strategy is timing. Sending an invoice at the wrong time or missing a contract renewal reminder can spell the end of a good customer relationship. Similarly, identifying the right opportunity for cross-selling or upselling can mean greater revenue potential for your business.

Wrk's Hybrid Automation ensures that customer success interactions are properly timed based on a customer's specific profile and needs. With CRM integrations, automation can flag and schedule customer communications, including invoices, reminders, renewals, and upselling opportunities. These timely interactions with customers ultimately translate into good relationships, higher NPS scores, and even referrals.

Explore Our Customer Success Wrkflows

Come together: why the amalgamation of technologies is the future for RevOps

Let's be honest, department silos were never an ideal state for organizations looking to optimizie their operational capacity. However, now more than ever, they are simply not an option. Especially, given the remote-first nature of many modern RevOps and the emphasis that is being placed on cross-departmental collaboration.

In this eBook, we highlighted how Wrk's unique Hybrid Automation platform can assist organizations achieve their digital transformation goals. The fluid, remote-first, and cross-departmental nature of many modern organizations who are embarking on digital transformation for the first time or mid-stream on this journey, requires an automation solution that matches this sense of flexibility and integration. The innovative combination of cutting-edge automation and human ingenuity allows operations teams to focus their efforts on campaigns and projects that add as much value as possible—safe in the knowledge that Wrk's automation can handle the rest.

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

Speak to an Automation Specialist