MAKING YOUR BUSINESS FLOW

Integrating and automating workflows

SIXTH STORY

The Creative Growth Agency®

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Integrating & Automating Workflows

What does that even mean? Well it's really just about joining the dots. If you have an ecommerce site to sell your products and an accounting system to keep your books, integrating the two so they talk to each other means you don't have to input the information manually. Which doesn't just save you a tedious job, it also eliminates the chance you'll make errors because you're so bored.

The same is true if you have separate online ordering and workflow management systems. Integration and automation means saving someone the task of manually inputting 10, 100 or even 1000 orders a day, allowing for faster processing and less administration. Time saved is money saved.

What now?

The first step to integration is understanding your business and identifying where connections need to be made.

Do you have a web form that's not linked to your CRM software, or a newsletter signup that doesn't connect to your email database?

Either as part of a larger digital project, or during a specific workflow consultation, we'll review your website and systems, map out your processes and get familiar with the way you work.

Making even a few seemingly small integrations could make your whole business more joined up, creating less opportunities for tasks to be overlooked and leads or enquiries to slip through the net.

Going a step further, the next phase is to understand which time-consuming tasks and processes can be updated to remove the burden of administration. Jobs like data entry can burn through man-hours at an alarming rate, and are at the mercy of human error. In plenty of cases, these are processes that your technology can do without you even getting involved. Automating as many of these tasks as possible can free up your workforce and create valuable time that allows you to focus on the core activities of your business. Which, let's face it, is why you come to work in the first place.
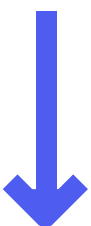
S.

Elliott Modular Buildings

We helped Elliot improve the accuracy of their direct marketing by integrating and organising their Salesforce and MailChimp lists.

The marketing department can now automatically send out high numbers of relevant communications to a range of different and changing audiences across the globe without have to spend hundreds of hours sorting the data.

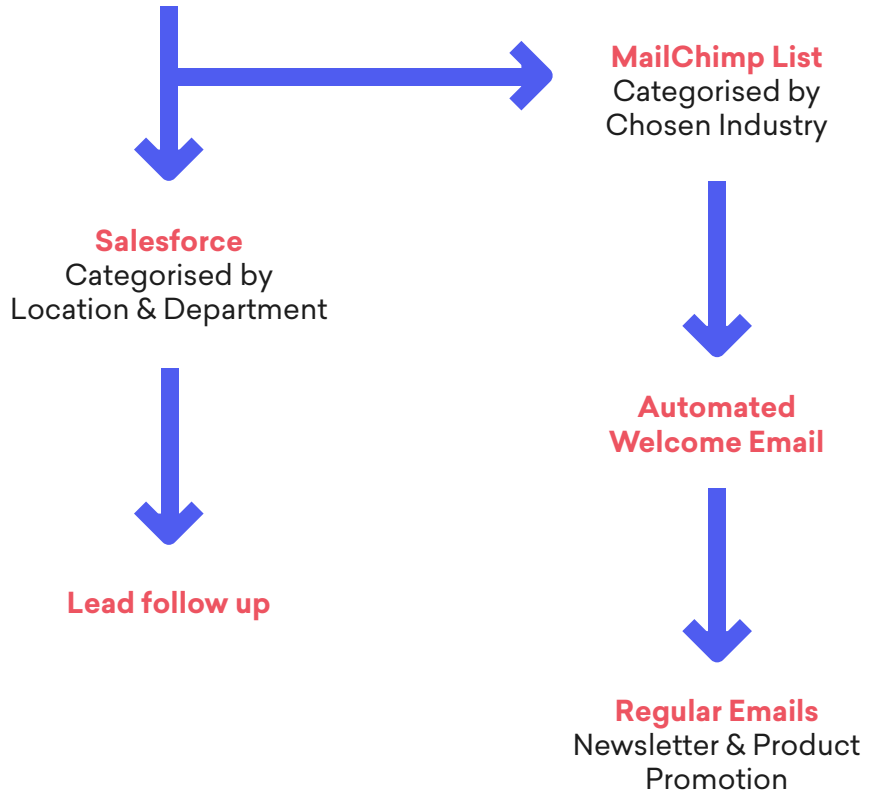**There are two automated flows which both integrate MailChimp lists and the Salesforce CRM but start at different points :**

1. General enquiry form on website contact page

2. Individual enquiry forms on approved used solution product pages.
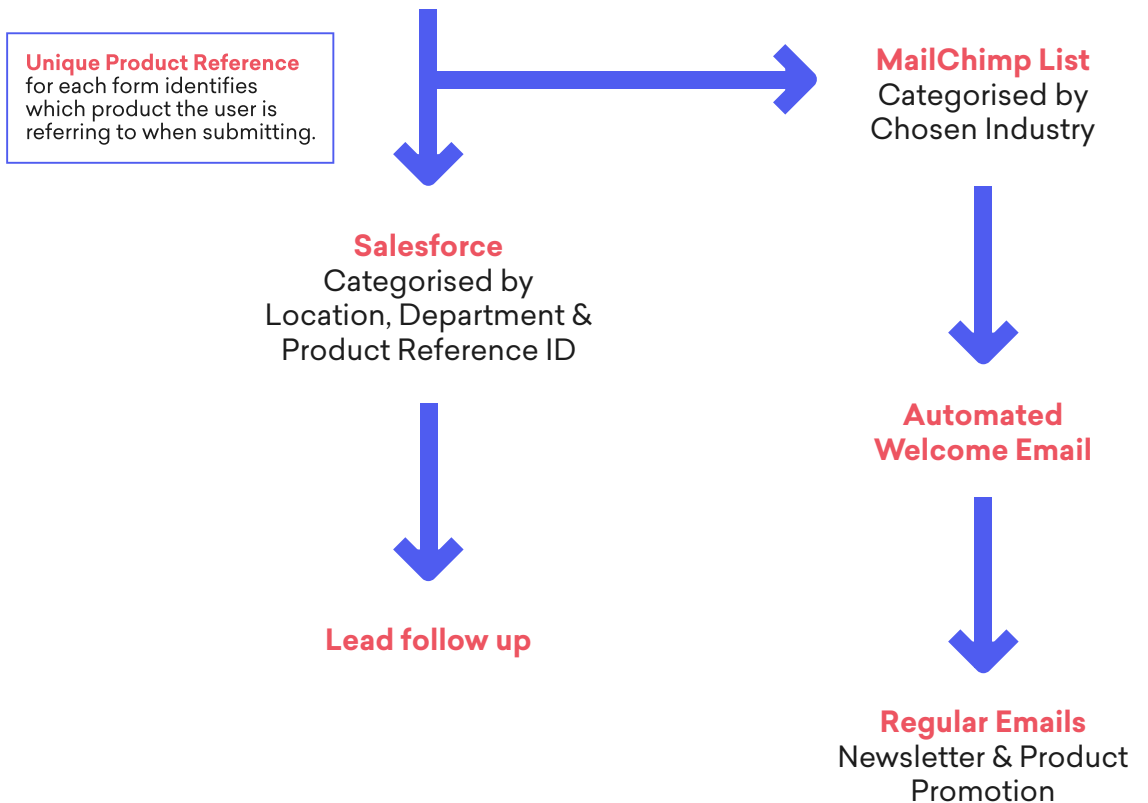
S.

1.

Website General Enquiry Form

MailChimp List
Categorised by
Chosen Industry

Salesforce
Categorised by
Location & Department

**Automated
Welcome Email**

Lead follow up

Regular Emails
Newsletter & Product
Promotion

2.

Approved Used Solutions
Enquiry Form

Unique Product Reference
for each form identifies
which product the user is
referring to when submitting.

MailChimp List
Categorised by
Chosen Industry

Salesforce
Categorised by
Location, Department &
Product Reference ID

**Automated
Welcome Email**

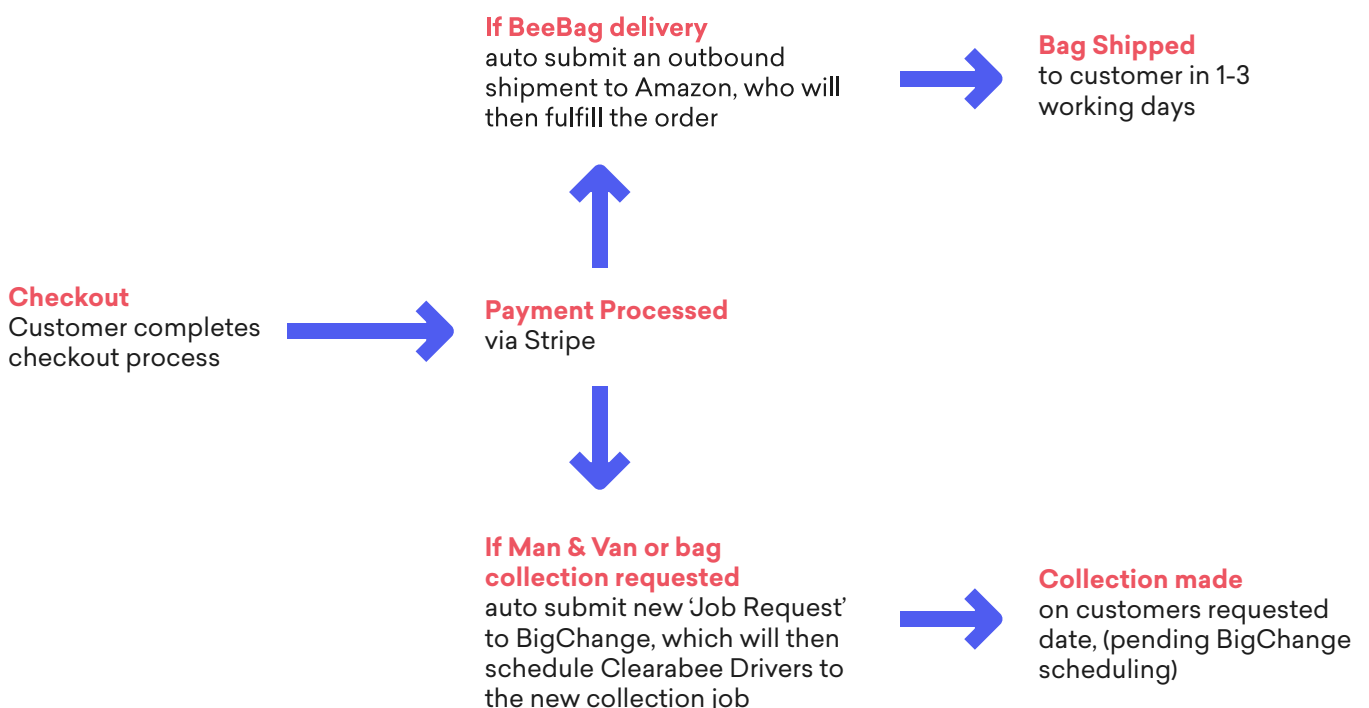**Lead follow up**

Regular Emails
Newsletter & Product
Promotion

Clearabee

After building them a complete integrated ecommerce system, we automated Clearabee's entire ordering process. As soon as an order is placed on their website, all of the systems involved – including Amazon Logistics and Delivery Vehicle Tracking – work together in harmony to ensure a smooth, seamless transaction.

Savings equal around £100,000 per year in man-hours and admin costs.

If BeeBag delivery
auto submit an outbound shipment to Amazon, who will then fulfill the order

Bag Shipped
to customer in 1-3 working days

Checkout
Customer completes checkout process

Payment Processed
via Stripe

If Man & Van or bag collection requested
auto submit new 'Job Request' to BigChange, which will then schedule Clearabee Drivers to the new collection job

Collection made
on customers requested date, (pending BigChange scheduling)

WANT TO DISCUSS YOUR PROJECT?

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