

# Low-Code Automation Designer's Playbook





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## Getting started with low-code

If you're reading this, you're likely looking to increase the efficiency and effectiveness of your everyday processes by digitizing them with a low-code automation platform. In the following pages, we'll break down core features of these platforms and how they can help organizations across industries achieve exceptional results. We hope these examples of low-code automation in action will inspire you to make your own workplace innovations.

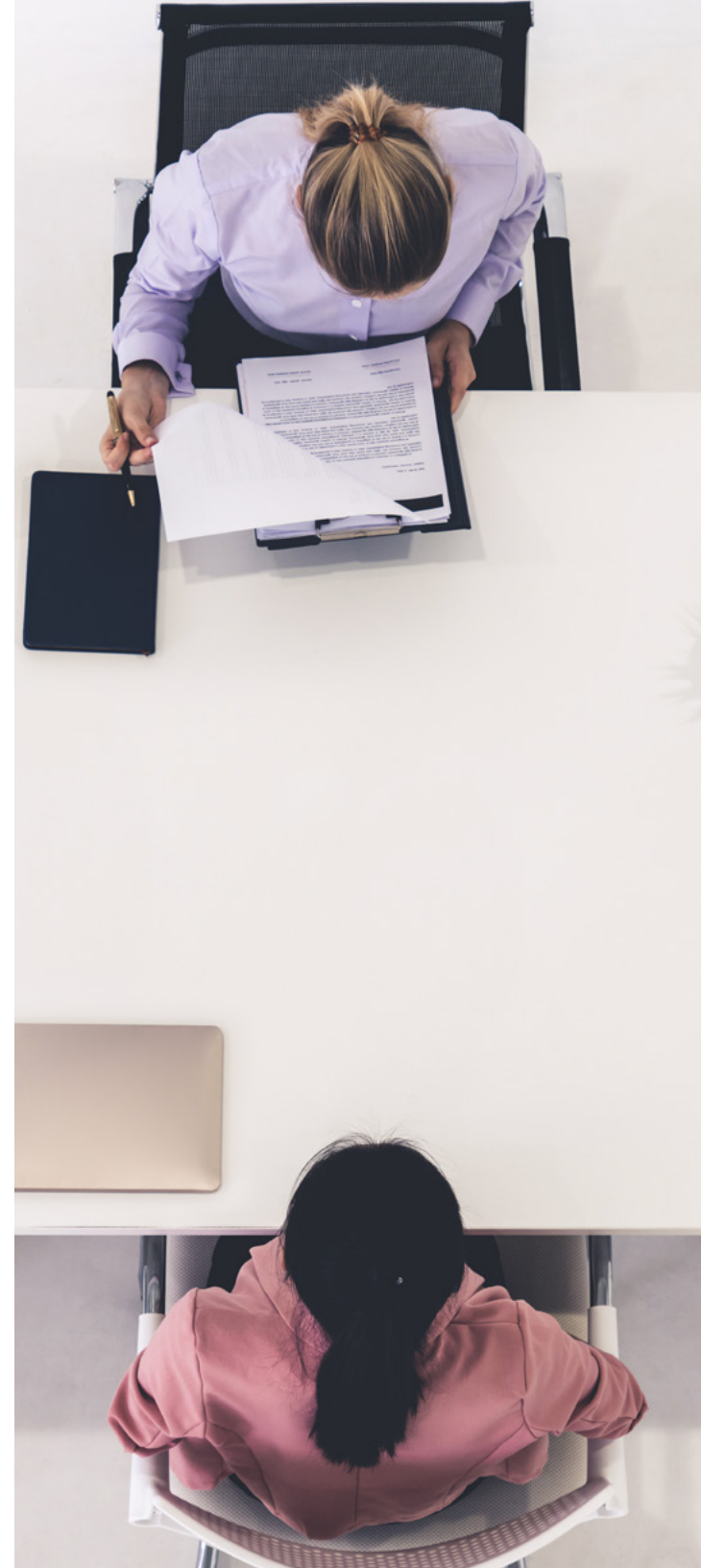
## Onboard talent faster

According to a 2022 survey by PwC, [77% of executives say hiring is one of the most important factors in achieving growth](#). That same survey found the second largest driver for growth was digital transformation. Digital transformation becomes even more essential with more than 60% of the workforce wanting to work remotely, [according to a survey by ZipRecruiter](#). With a low-code automation platform, you can both achieve digital transformation and deliver a more streamlined process for new talent, which can make for an exceptional first impression for onboarding employees.

Workflow designers are one of the most useful tools in streamlining this process. These tools allow you to map out a process and determine where content is moved, who needs to act on it and when. In the example of onboarding, you can use low-code automation to route new employee paperwork to the proper stakeholders and store them in a secure document repository. Automating these processes allows more time for new hires to get accustomed to their new workplace, effectively accelerating the time between training and performing core job duties.

### Case study: Frisco USD

Having grown 800% over the past two decades and likely to continue, Frisco ISD is always looking for ways to meet the demands of a growing student population and an increased need for more staff and faculty. [Read the case study to see how Frisco ISD uses digitized workflows to streamline its onboarding process.](#)



## Digitize the customer experience

Today, people order almost everything online. The modern customer expects a seamless, digitized experience. For example, financial advisory firms with many regulatory requirements and the need to get sign-off from new clients, face a unique set of challenges as both employees working from home and clients initiating requests online expect to access resources remotely. A low-code automation platform can help financial advisory firms meet this challenge, as well as any organization looking to improve how they gather information and receive approvals from clients.

A great way to streamline the gathering and use of customer information is by using digital forms. You can set these up to be accessible via the web, whether directly on your site or through a customer portal. This saves customers time having to fill out and deliver a form by hand, and saves staff time from having to either file the information manually or copy the information by hand into a digital system. With a low-code platform, you can automatically route the information from the form to the right place, mitigating the possibility of losing information, which can be a compliance concern. These platforms even make it possible to add logic to a process based on a form's information. As far as signatures, whether from the client side or in-house, low-code automation platforms can use all kinds of integrations to gather digital signatures from the appropriate parties.

**Public Records Request**  
Please use this form to request access to Beach City public records

**Requester Information**

First Name \*  Last Name \*

Phone Number (\*) \*  Email \*

**Request Details**

**Preferred Method of Delivery**  
Please indicate how you wish to receive the requested records.  
Pick up

I would like to: ☐ Inspect ☒ Obtain a copy

Number of Copies

**Records Requested: \***  
Describe the specific public records being sought.

### Case study: Shufro Rose

Shufro Rose, a wealth management firm managing billions in assets for thousands of clients, understands that technology can play a critical role in providing client services. [Read the case study to see how the firm was able to open 189 accounts in a single year using a revamped client onboarding process.](#)





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## Jumpstart everyday processes

When beginning your digital transformation journey, it may seem difficult to know where to get started. Additionally, even if you have plans for the process properly laid out, you may not have the resources to execute on those plans in a timely manner. This can be especially true for organizations that need to digitize processes across their entire enterprise.

One way to address these challenges is to look at process templates others have developed, usually through [a marketplace](#) set up by your low-code platform's vendor. These templates can either be ready-to-go processes or more traditional templates that provide a foundation for your own automated processes.

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## Capture key information

With today's organizations managing many different types of forms coming from vendors, customers and internal departments, it can be difficult for employees to automate workflows based around this kind of content. This in turn makes data entry one of the most repetitive tasks for knowledge workers. However, a low-code platform can help your organization automate what it was previously unable to using intelligent content capture.

Using machine learning technology, intelligent content capture gathers key data points from incoming forms and documents, digital or physical, and sets them as metadata. This is especially useful for accounts payable departments that can use low-code to automate not only the gathering of data from invoices, but invoice matching to make sure they reflect what was listed in the purchase order.

### Case study: Mercer Island School District

See how Mercer Island School District automated their accounts payable process with smart invoice capture and other technologies, to better process and locate invoices, [even with a database that hosts over 2,000 different vendor profiles](#).



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## Automate business logic

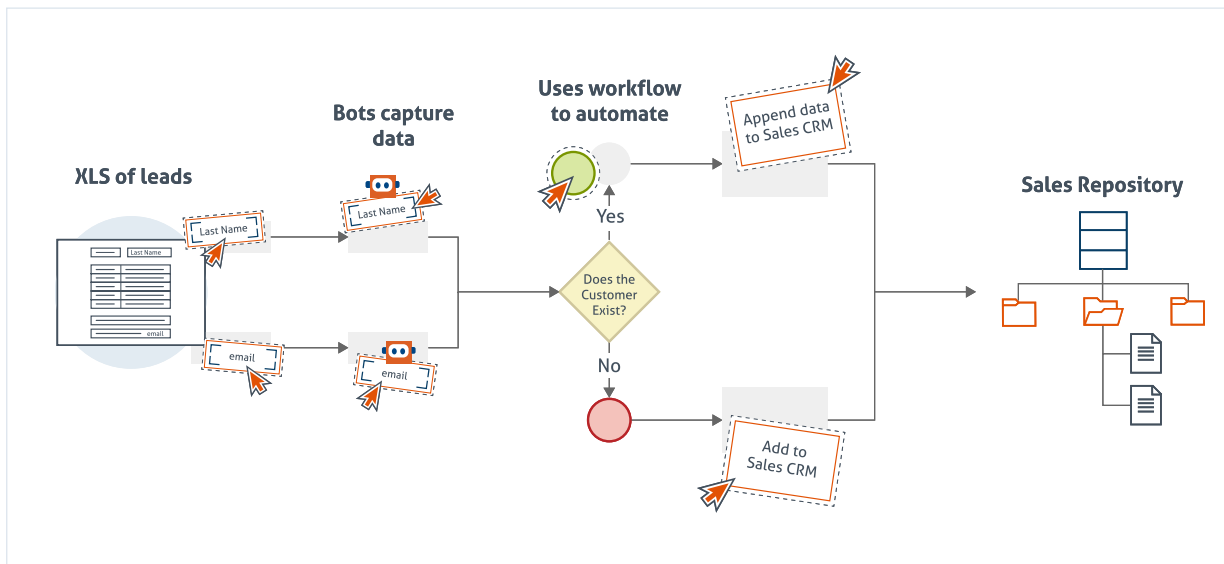
Even when a decision is made about approving a request, there's usually a difference in how that process proceeds depending on the result of the decision. A low-code platform can not only automate the process before the decision, it can also automate workflows using business rules, which will change the process depending on a decision. This makes it so that approvers only need to press a button to continue a process, regardless of their decision.

Take for example an expense reimbursement. Let's say an employee has an allowance of \$250 for a business trip, and they only spend it on items such as food and travel. The employee submits the digital reimbursement form, and the low-code process automatically routes it to the correct stakeholder for approval. If it is approved, it goes through as usual. If denied, the form is returned to the recipient with a request to make changes where appropriate.

## Mitigate data entry

Today, business processes run through many different applications. Low-code platforms, and in fact many types of applications, usually have integrations that allow them to push data to outside applications, to make these processes more seamless. However, whether these are pre-built integrations, an applications programming interface (API) or something else, many of these integration solutions require both applications to cooperate on the back end. For some applications, such as legacy applications or those that simply lack certain features such as an API, these types of integrations can prove ineffective.

That's where a low-code platform with robotic process automation comes in. With this integration tool, you can instruct a robot, commonly referred to as simply a "bot", to work directly on application's user interface, as a person would, avoiding the need to utilize predetermined, back-end access points to transfer data.



For example, if your sales team acquired a large set of leads on a spreadsheet after attending an industry conference. With RPA technology, the team can simply train a bot to enter relevant lead information into their CRM, instead of entering information manually for each individual entry — ultimately giving them more time for lead outreach instead of data entry.



Adobe Sign

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File Upload\*

Upload

You have reached the maximum file limit: 1.

Nondisclosure Agreement.docx

58.23KB

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Add Signature Fields by:

☐ Adobe Sign UI

☒ Adobe Sign Template

☐ Default

Adobe Sign Template\*

Email Sender? (?)

☐ Adobe Sign

☒ Laserfiche

Parameters

Save To Laserfiche Path

Leave blank to use default

Adobe Sign API User Email

Leave blank to use default

Email Table

Email\*

Role\*

Signer

▼

Add

Submit

## Integrate across the enterprise

While the applications of a low-code platform may seem limitless, there are some tasks that some external applications may specialize in and excel at. For these tasks, such as acquiring digital signatures and document editing, many low-code platforms offer pre-built integrations. These solutions are usually built right into the low-code platform itself, providing a seamless experience between applications.

For example, if you're designing a contract management process, you may want to use an integration with a popular digital signature application to authorize final sign-off of the application. The great thing about a low-code platform is, once the signature is complete, the document can be securely stored in a repository automatically.

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## Discover new efficiencies

Even well-designed business processes, digital or otherwise, are subject to inefficiencies once they're executed. Without the right tools, it can be difficult to identify bottlenecks that are slowing down processes that could be running faster. Low-code platforms offer a solution to this issue with reporting and analytics features.

Because low-code processes are digitized, they are much easier to track. In addition, you can add metadata to content you're using, creating more layers of data to work off of. With combined insights from metadata and process metrics, you can gain a full picture of where a process can improve.

### Case study: TPIRC

The Translational Pulmonary & Immunology Research Center tasks itself in developing new treatment protocols for conditions other physicians no longer try to treat or cure, also known as orphan diseases. Developing a comprehensive picture of patient health and understanding how patients react to different protocols is crucial to this research. [Read the case study and discover how they were able to leverage reporting and analytics in their efforts to provide effective treatment plans for patients.](#)





## Preserve important content

There are plenty of reasons you may want to keep content around, whether it's for reference, compliance or simply as a source of record for a particular event, transaction or process. For content that needs to follow a retention schedule, a low-code platform can alert records managers to archive or dispose of content. If a low-code platform is part of, or paired with, an enterprise content management system, it can also securely store that content between the archival and disposition stages.

Take, for example, a public university that houses student records in its enterprise content management system. If that system is part of a low-code platform, a records manager can configure a process that notifies them when it's time to archive or dispose of student records, in order to stay in compliance with regulatory restrictions or university policies.

### Case study: The Isle of Man

A British Crown Dependency with a history that goes back more than 1,000 years, the Isle of Man uses digital records management to safeguard historic records and provide the public better access to information. [Learn more about how the Isle of Man innovated its services by reading the case study.](#)

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## Further research

Now that you have some ideas on what you can accomplish with low-code, here are some next steps you can take to further explore how to make those innovative ideas a reality.

- ☐ [Compare top digital process automation vendors](#) on G2.
- ☐ [Learn how to drive efficiency with Laserfiche low-code automation.](#)
- ☐ [Book a consultation](#) for a guided low-code demonstration.



## About Laserfiche

Laserfiche is the leading SaaS provider of intelligent content management and business process automation. Through powerful workflows, electronic forms, document management and analytics, the Laserfiche® platform accelerates how business gets done, enabling leaders to focus on growth across the enterprise.

Laserfiche pioneered the paperless office with enterprise content management. Today, Laserfiche's cloud-first development approach incorporates innovations in machine learning and AI to enable organizations in more than 80 countries to transform into digital businesses. Customers in every industry — including government, education, financial services, healthcare and manufacturing — use Laserfiche to boost productivity, scale their business and deliver digital-first customer experiences.

Laserfiche employees in offices around the world are committed to the company's vision of empowering customers and inspiring people to reimagine how technology can transform lives.

### Connect with Laserfiche

