

## Practicing What We Pitch

How Mitratesch is Implementing  
TAP Workflow Automation



## An Outdated, Labor-Intensive Situation

As a technology company that uses a wide number of software vendors to improve our processes and run as efficiently as possible, handling new application requests and vendor contracts is a huge priority for Mitratesch.

The issue? With employees seeking access to new software, and considering the number of trials and freeware available, controlling the trial and adoption process was a priority.

The initial, pre-TAP process put in place to better manage trial and adoption of new applications looked something like this:

1. Someone filled out a form and submitted a request for new software to IT via email.
2. IT reviewed the form and passed it around to different approvers, again via email.
3. Legal and Hosting Security reviewed any licensing agreements.
4. Legal executed a contract.



The challenges this process presented? Several:

**1. The forms couldn't validate the data.**

Since the form was really just a Word document, IT couldn't ensure that prospective users entered all necessary data they needed to move the process forward.

**2. The approval process was completely linear (and time consuming).**

The form would move through the approval chain person by person, pausing at each point for the next person to sign off on it. This meant estimating a time frame for completion was practically impossible. One person could take two weeks to review and approve, another could take two days - the entire process could take upwards of five weeks for something as simple as a new license for Microsoft Office.

**3. A manual process meant manual errors.**

Oversights are more common and mistakes much easier to make when a process is driven by manual routing, paper-based documents, and other old-hat approaches.

The original plan was to build out a workflow process into our Salesforce instance. But then the Mitratesh team discovered the power of TAP Workflow

Automation. How did this change the game? Here's what Kevin McAuliffe, Business Applications Manager at Mitratesh, had to say:

"We originally built the approval process out in Salesforce, but we never went live with it because TAP became the obvious option. The biggest advantage to TAP is that you don't have to be a Salesforce user to use it. With Salesforce, you need a license for every person involved - each submitter, each manager, etc. Not everybody has - or needs - a license for Salesforce to do their job. With TAP, you can give access to the whole company and anyone can use this system."

## The Benefits of Introducing TAP

What are the benefits of turning on TAP Workflow Automation?

1. It helps manage and mitigate risk
2. It replaces manual processes with standardized, automated, digitized workflows
3. It validates data
4. It drastically reduces approval time

## Manage and Mitigate Risk

By automating processes that ensure the right approvers are looped in at the right stages of the process (and that nothing slips past Legal that shouldn't), companies can significantly reduce their risk. Here's how workflow automation helps Mitrtech manage risk:

**It ensures that legal and security are on the same page when it comes to approving a contract.** For example, if security only wants a software license approved on a trial basis, it's important that legal knows not to approve it permanently.

“ If we didn't catch certain things in time, there's no telling what the ramifications could be.”

### CHANDLER BINGHAM

Paralegal, Mitrtech

Ultimately, Bingham points out, it's important to make sure everyone's on the same page before a software license or contract gets approved.

**Makes sure the right people have eyes on the right agreement at the right time.** It might sound obvious, but different documents and different application requests need different approvers. This could vary depending on the size or cost of the request, the departments involved, or other factors.

For example, Bingham mentions, one instance occurred where an agreement exceeded a department's budget, but Legal didn't realize the discrepancy because it doesn't have access to all

relevant budgets. Luckily, the error was caught by Finance before Legal executed the document. While those types of errors can easily occur all too often when processes are manual, in an automated process documents are automatically routed to the right decision-makers based on a series of pre-set parameters. That reduces these types of errors - if not eliminating them entirely.

**Reduces Financial and Data Security Risks** As already mentioned, if the right people don't have their eyes on requests at the right time, the results could be disastrous. Budgets could be blown up, binding legal agreements could be erroneously, almost accidentally initiated, and sensitive data could be shared unintentionally.

Legal workflow automation drastically improves how companies manage these risks. Approvals and routing can be set to control financials and costs. And parameters can be set on how data is used and shared so that access is restricted on a need-to-know basis, and data stewards know exactly where their data is at all times.

## Automates Manual Processes

We've covered what the prior in-house process at Mitrtech was for adopting a new software license or business application. Now let's dive a little deeper into why that process needed a better approach in the first place.

Sure, it was incredibly time consuming. But what else?

Before implementing TAP, Legal and Security received roughly one software agreement per month. Once IT, Security and Business Apps initially approved it, the first step for Legal was to follow up with Security to capture any comments, questions, and a general baseline response before reviewing the official agreement.

“Usually we (the legal department) have lots of questions about what requirements to include. We normally spend at least four to five hours talking about what to include in an agreement, et cetera. With a TAP workflow, all of that collaboration and commentary will be included in the comments section. So I can just go into the workflow and have everything listed out for me. That should cut out a lot of back-and-forth,” Bingham states.

For example, if security requires that a business application have a SOC II agreement, they can just make a note in the approval workflow that IT is guaranteed to see, rather than remembering to follow up in a separate email.

Baking what would otherwise be time-consuming, manual tasks into an automated, standardized process helps save time, money and improve operational efficiencies.

## Validates Data

Rather than relying on the honor system and individuals' ability to remember exactly what information is needed at each step of the process, with TAP Workflow Automation users are automatically required to complete various data fields of online digital forms and documentation in specific ways. This allows companies to control the data users can enter into a specific field.

For example, if a data field requires a monetary value,

you can preset the field so that it doesn't let users spell anything out, or use anything aside from a number value. Moreover, they can't submit that document until all fields have been completed with the data you mandate: incomplete submissions become a thing of the past.

Here are just a few examples of how TAP enables data validation:

### 1. Use dynamic data requests based on what the user enters.

In the case of an “other” option, fields can be preset by the form designer to require a description of what that means, which then triggers dynamic data validation for that entry. For example, if IT needs to know what type of software delivery method you want to use (online, SaaS, hosted, etc.) the form field can validate or disallow the entry, depending on whether it's inside or outside of a specified range.

### 2. Use hidden fields to get the full picture

Say a requestor inputs an annual dollar value and number of years for an initial product license into the form's data fields (i.e. \$50K annually for three years). The form designer can include the option to provide a hidden value visible only to the approvers, so an approver can see this really means a \$150K total.

In our case, that hidden value means the request then reroutes to the CFO, because the workflow is designed to route him any requests over \$100K.

Using hidden values, companies can create and route requests based on a pre-designed approval matrix. For example, requests under \$25K could be routed to one person, above \$75K could be routed to another, and anything over a different preset limit could be routed to a different approver, based on budget and product type, among any other number of parameters.



### 3. Set standardized timeframes for phases or completion.

When your colleagues want a new tool in hand ASAP, it can be tempting for them to estimate a very quick (perhaps unreasonable) timeframe for executing a software license or onboarding a new business app. But Legal understands that negotiations often take time. As much as users may want to speed the process along, it's important to build these expectations into a workflow at the very beginning.

How to handle this using TAP? Automatically set parameters around allowed dates. For example, you can block out the first two weeks after a request is submitted or approved in order to allow time for negotiations. With TAP, you can create pop-ups that display an invalid or error message when this is attempted, so workflows are standardized when it comes to timing. This standardization of timeframes can apply to any phase of a workflow, too.

“The implementation team for TAP has been great at finding alternative ways to solve these types of problems. They solved a few problems for us with calculations in the background. They also made it so we could hide some fields that shouldn't be changed during approvals, but still allow work on the backend to get everything into the right peoples' hands,” Bingham says.

## Drastically Reduces Approval Time

This part's pretty simple and straightforward, so let's describe it that way. TAP Workflow Automation drastically reduces the amount of time it takes to move a document from initial request all the way through to approval.

Here's what that looked like at Mitratesch:

“Prior to TAP, the approval process could take months, depending on the availability of the approver. With TAP, the whole process should be wrapped up within 30 days. Now that the pieces of the approval process move in parallel (rather than in a straight line) the approvals don't have to bottleneck around just one person,” Kevin McAuliffe explains.

- Even better? This new application request workflow is just the first example of workflow automation set to roll out at Mitratesch. It creates a great testbed and template for similar projects to follow in future.

- That's literally true, since TAP allows a successful workflow and its digital forms and documents to be saved as templates that can be applied to other processes, and customized where necessary.
- Important content and assets can be standardized, housed in a central library, where permission settings prevent most users from modifying critical language such as clauses.
- Better yet, any workflow can be improved and optimized over time, thanks to TAP's built-in performance analytics and governance features.

"We don't want to bite off more than we can chew, but we had this process well-documented, so it was a perfect launching pad for internal workflows," As Kevin McAuliffe says.

“This is just the pilot. As we come up with more use cases, we'll roll them out. We like to use TAP for just about anything we can where it will provide some sort of process efficiency.”

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