

7 DO'S AND DON'TS OF CHOOSING AN AUTOMATION SOLUTION

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INTRODUCTION

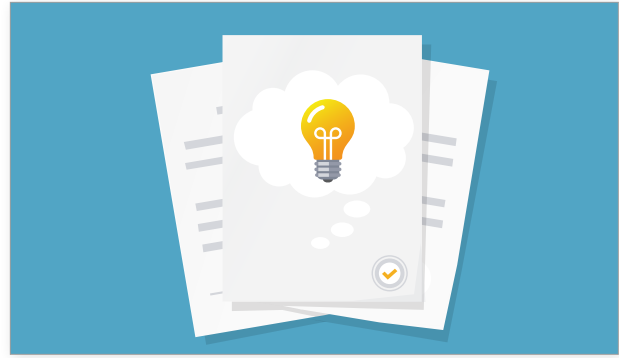
Thank you for your interest in our eBook, 7 Do's and Don'ts of Choosing an Automation Solution. This eBook won't hit you over the head with the features and benefits of the InRule® Intelligence Automation Platform. Instead, we present a selection of lessons gained over two decades providing automation solutions and helping over 500 customers across the globe improve user engagement and save development costs through no-code decisioning, process automation and machine learning applications.

Every day more and more user organizations are leveraging the power of AI (Artificial Intelligence) to enliven customers, detect fraud and instantly serve applicants in need, among a growing list of use cases. Those engaging automation successfully likely heed the guidelines to follow.

At the end of this eBook, we've included a checklist that may be helpful as you begin evaluating automation platform providers. You may also find our [Good Beginnings](#) blog series to be of interest. The series covers topics ranging from how to start a project to identifying the best team members to create automated applications.



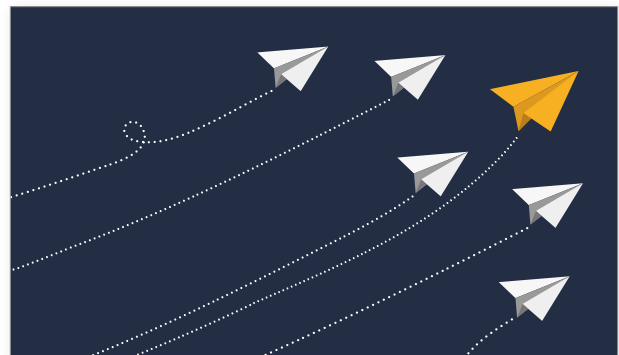
DON'T rely on talk. Seeing is believing. Experiencing is confirming. A competitive automation provider will happily offer a product demo. *Take advantage of it.* Give Subject Matter Experts (SMEs) the chance to author, test and deploy sample decision logic or/and process automations. If machine learning is part of your solution, are its insights useful and can your users leverage AutoML? Find out for sure with a real-world demo.



DO get a Proof-of-Concept (POC). As with autos, the best way to determine if an automation solution – decision automation, process automation, machine learning – is right for your organization is to take it for a drive. A competitive platform provider will gladly build a POC to address your particular pain point(s). Request a POC and get your hands dirty using it. Write some rules. Build some workflows and processes. Make some predictions. See how it feels. Can your SMEs use it without technical support? Does it require excessive integration investment? Find out for sure.



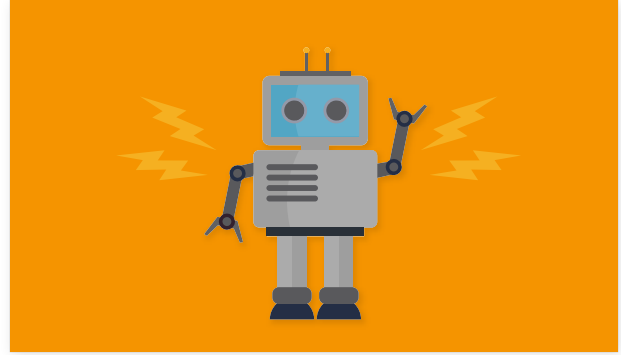
DON'T ignore tech experts. Yes, technology providers know their products. But it's your IT staff that knows your systems. Make sure to consult your technical experts to make sure a solution can modernize any legacy systems and won't require excessive time and effort to integrate or build specialized applications.



DO test out support. The best time to know the level of your automation provider's support is before you need it. Gauging responsiveness to email requests is a simple way to shed light on a company's commitment to its customer's success. If a provider is not responsive to you as a prospective customer, they likely won't be any more motivated to help you once they've taken your money. Review any support materials and product documentation. Post in support forums to see what comes back. Check out their forum activity. What issues are users posting about?



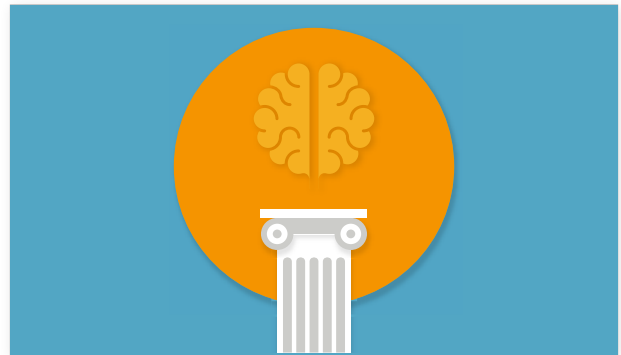
DON'T think too short. Never lose sight of goals and future plans for architecture and integration. Once deployed, you'll likely want to expand automations to improve every aspect of user interactions. An initial application such as decisioning or process automation may solve your current issues. Once up and running, you may want to leverage even more AI power through integrating machine learning insights. Be sure your provider can accommodate your most ambitious projections to ensure they can meet your needs today and years from now.



DO consult tech experts and join training sessions. How well will an automation solution integrate with your systems? Can a provider's solution collect data from various other sources? Where can your solution deploy? How long will it take to build any specialized applications and ramp up to launch? Make sure to involve the technical folks best poised to make those and other technical determinations. If available, have your technical team participate in vendor training and receive guidance from your provider's implementation, services, and support team so you can take ownership of your own automations. These expert teams have seen it all and can impart key guidance that has paved the way for similar project successes.



DON'T think too narrow. Take off any blinders when evaluating where to deploy automation solutions. Consider all your resources. Do you need on-premises deployment? SaaS? Hybrid? Make sure your automation provider can accommodate your needs and offers a full spectrum of AI-powered automation spanning decisioning, process automation and machine learning to best facilitate your continued success.



DO involve the SMEs and key stakeholders. For the greatest adoption, get subject matter experts involved early and often. The key players who will be tasked with managing daily automations are the ones best primed to rate a particular solution. Can non-technical users easily manage rules creation, testing and updating without tech support? Can they view and share reporting analytics? Will they happily take the automation reins and go?



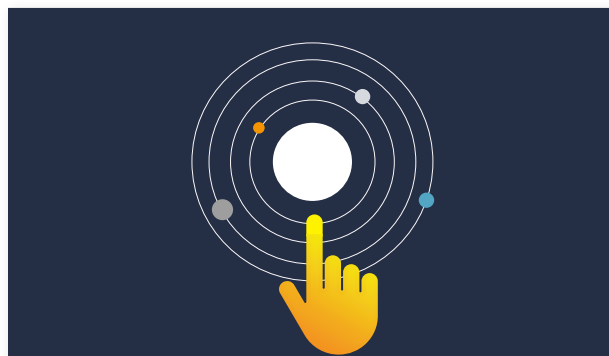
DON'T overlook IT time savings. After implementation, most organizations report significant time savings in addition to cost savings. Writing, changing and maintaining automated solutions in hard-code takes time. Empowering SMEs to directly manage and access decisioning, process and machine learning applications frees development teams to work on other projects. In fact, InRule reports reducing development time by an average of 38%, amounting to one day back each week. One customer reported recovering \$6 million per quarter in development costs by including their business analysts in their decision lifecycle. To accurately assess IT savings, be sure to establish current hourly benchmarks with existing systems ahead of project launch.



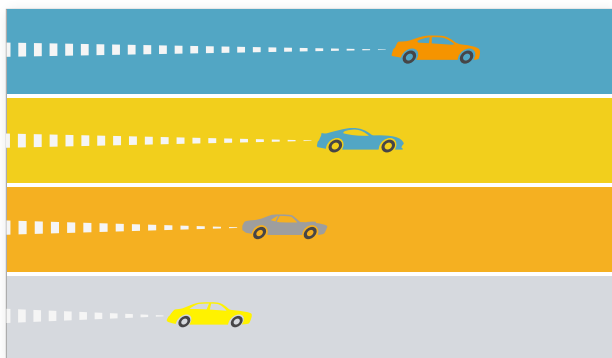
DO consult customer reviews and retention rates. Online reviews are a great, unadulterated source of customer insights. Judge posts in terms of specificity and context. Make sure harsh criticisms aren't outliers and not representative of most users' experiences. Further, nothing speaks to product credibility more than the number of customers who opt to keep using it. According to multiple sources, typical customer-retention rates of IT providers are around 80%. InRule boasts retention rates that hover around 95%.



DON'T attempt to freeze the Tropics. The best way to attack any problems with automation is one at a time. Taking on too many issues ("freezing the Tropics") at once will likely doom them all to failure. Focus on the single problem with the greatest impact, the one that's both measurable and likely to yield the biggest ROI (return on investment) in the shortest period.



DO find out about specific industry expertise. Every business and organizational segment, certainly yours included, has specific needs and requirements. A provider experienced in serving customers with similar needs – such as mortgage originators, insurance payors, government agencies, retailers and healthcare providers – will be best poised to meet your needs. They'll speak your language and have real-world knowledge of the regulatory issues, operational challenges and market forces you must navigate.



DON'T wait for the competition. It's no secret about the many advantages of AI-powered automation. Hesitating too long in leveraging decisioning, process automation and machine learning risks losing ground to any competitors who are moving ahead full steam. When it comes to advancing your digital transformation to the leading edge, there's no time like now.



DO evaluate full ROI. When considering ROI, be sure to pay attention to a complete spectrum of measures. Prospective providers should be prepared to detail how their solution will help you save money, hours and brainpower while growing revenues. InRule helps customers grow revenues at 5% annually. At the same time, we've helped our users save roughly \$1.5 million in costs of hard-coding applications or manual hours.

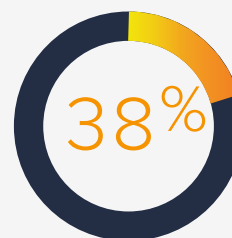
AVERAGE IMPLEMENTATION
SAVINGS REPORTED BY
INRULE USERS:



AVERAGE TOTAL SAVINGS OF
CHOOSING INRULE OVER
HARD-CODED LOGIC

\$1,485,150.43
PER CUSTOMER

INRULE USERS REPORTED
EFFORT FOR LOGIC CHANGES
REDUCED BY:



CHECKLIST

Please make sure you've checked all the boxes below before you sign on with an intelligence automation platform partner:

- ☐ Completed a trial of provider's proof of concept
- ☐ Evaluated provider's product documentation
- ☐ Tested provider's support team
- ☐ Received input from all SMEs and stakeholders
- ☐ Consulted internal technical staff – confirmed proper integrations
- ☐ Confirmed provider can accommodate our most ambitious plans
- ☐ Established ROI and other benchmarks
- ☐ Chose a true partner who will help us dream big dreams and realize them

Thanks again for checking out the best of our collective knowledge and experience. Do take this guide as inspiration to move forward in your automation journey. Don't hesitate to reach out to our team for technical specs, pricing details and any other information. [Request a free demo](#) or [30-day-trial](#).



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