

IBM Cloud Pak for Business Automation Use Case Demo

Achieve better business performance with AI-powered automation



Simplify common tasks

Quickly build low-code business applications to manage the onboarding process from application to onboarding

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Automate customer requests

Reduce completion times on customer requests and consistently deliver a seamless experience.

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Optimize internal processes

Detect and resolve issues earlier to streamline invoicing and make operations more efficient.

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Explore the solution details



Simplify common tasks

Transform business operations with AI-powered automation

Companies are trying to find ways to remain competitive and improve operations by boosting productivity and delivering a streamlined customer experience. By applying and scaling AI-powered automation to key operational areas, they are improving both internal and customer-facing processes. Take Joe, an IT developer, who has been taking twice the time he used to managing requests and is working late nights and weekends to keep up.



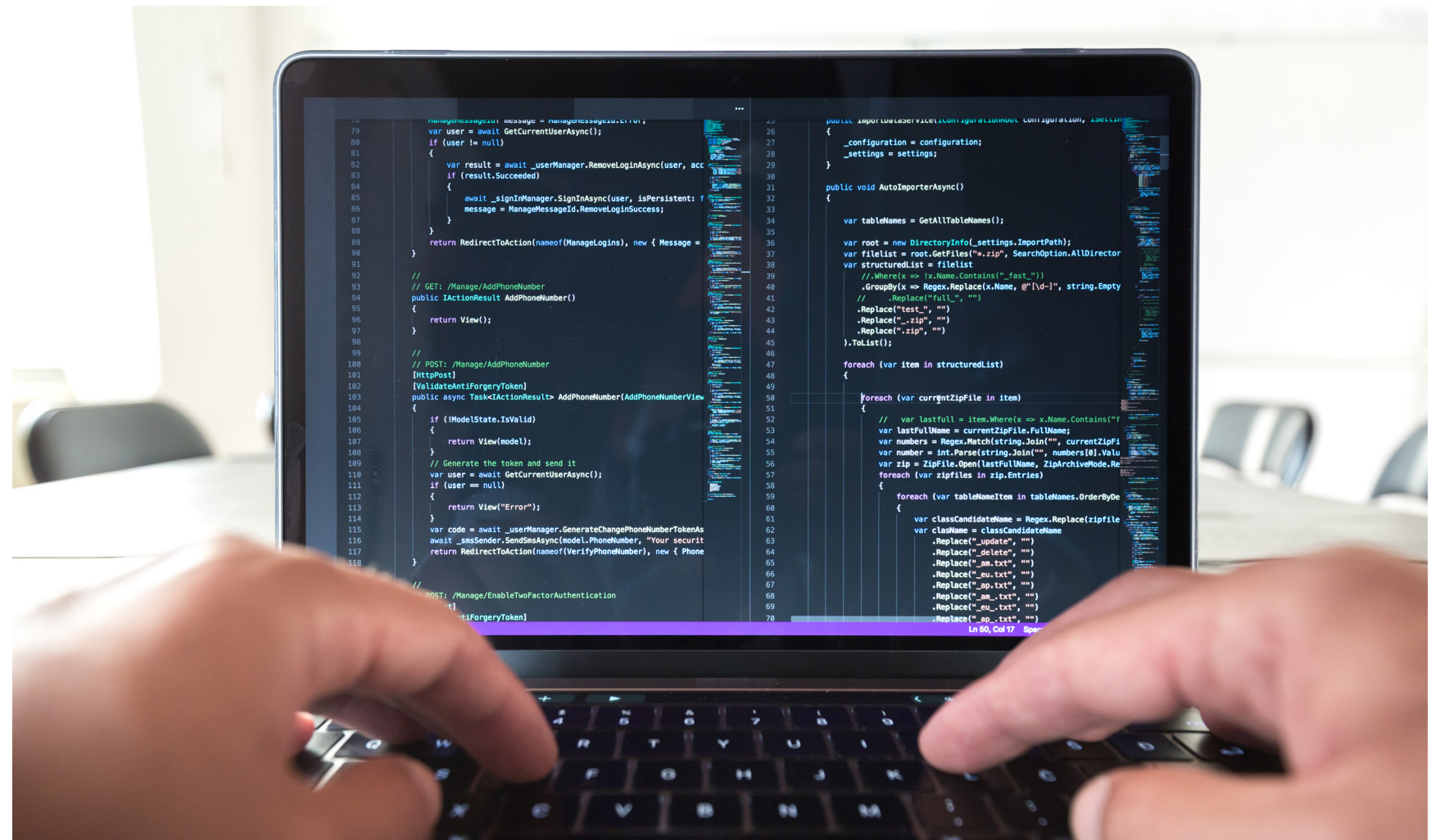
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Simplify common tasks

Reduce the need for IT to perform minor app changes

Joe is spending more and more time making small process changes and creating simple automations for the customer accounts team. He is looking to offload this work, preferably with a tool that gives the non-technical customer accounts team more control to make small adjustments and customizations.



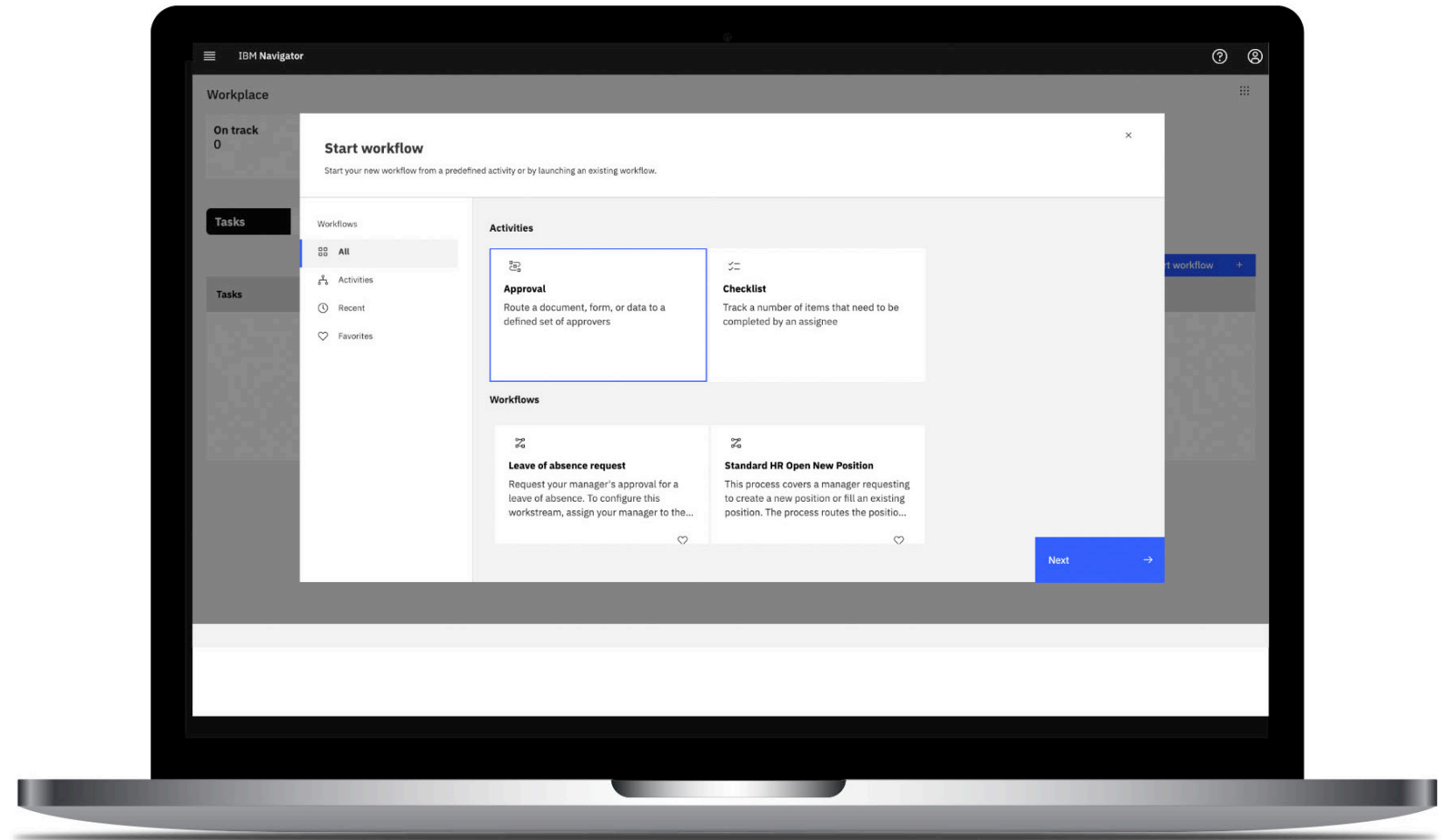
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Simplify common tasks

Automate common tasks – no coding required

Joe needs a tool to simplify and automate common tasks fast with no technical skills required. He discovers IBM Cloud Pak for Business Automation, which allows him to collaborate with the customer accounts team to create lightweight workflows without coding and manage simple automations.



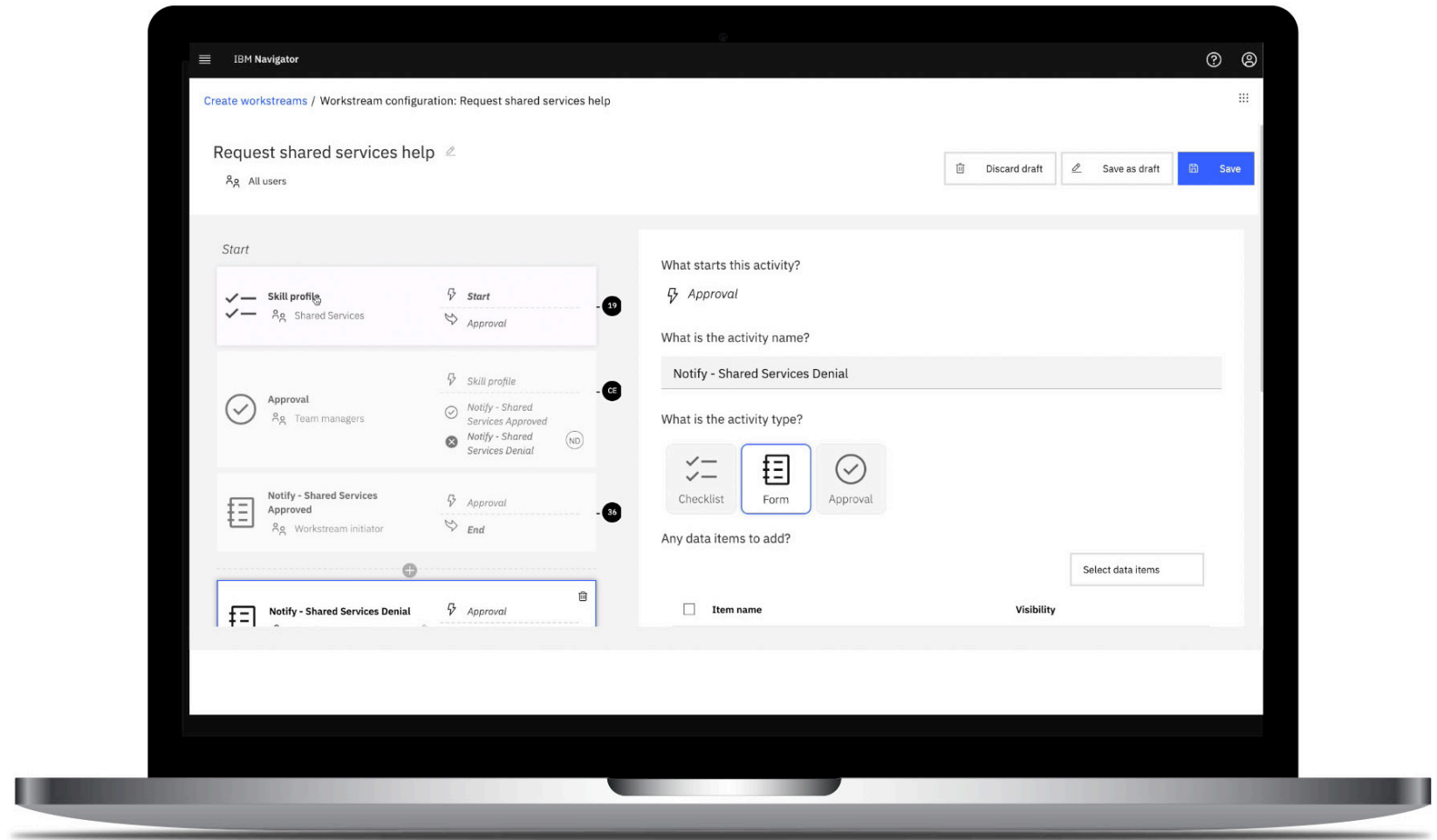
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Simplify common tasks

Design a workstream for each task requirement

Joe starts by creating a workstream to manage their requests. He designs a form to collect information like the skill profile required to perform the task and approval chain. Next, he creates a checklist with experience and possible task requirements. Finally, Joe assigns the department responsible for each task.



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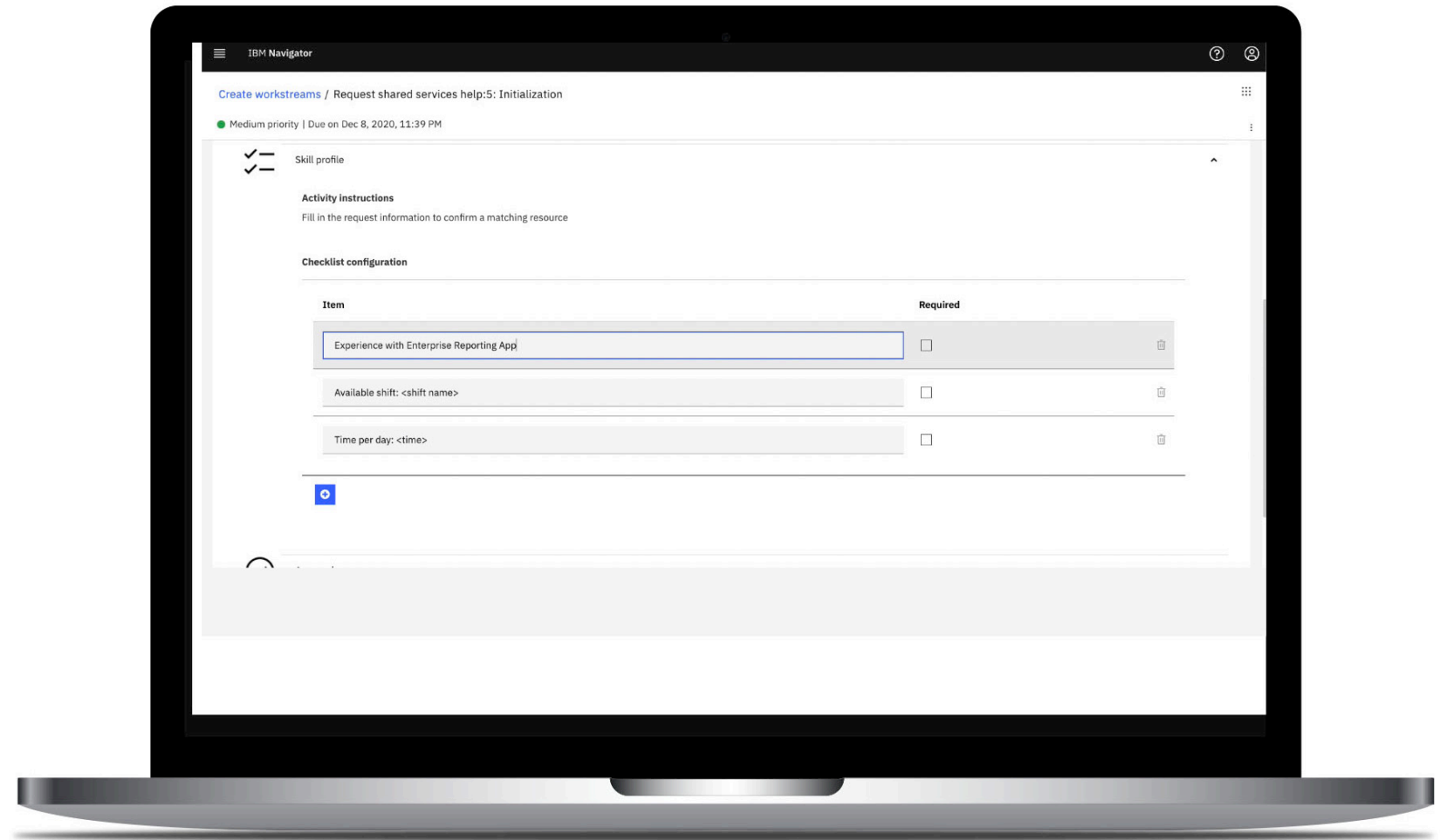
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Simplify common tasks

Reduce remote work limitations: improve productivity

Linda, a customer accounts manager, selects the workstream Joe designed to provision a task she needs to perform. She inputs the activity, chooses the required tasks, and indicates whether completion notifications are necessary. And the tool handles the rest.



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Simplify common tasks

Optimize internal processes with AI-powered automation

By automating routine work, Joe reduces process times, boosts his productivity and speeds workflow completion. While Linda's team can make app changes without coding experience, moving their work forward faster and freeing up time to focus on more complex tasks - saving work hours across the board.



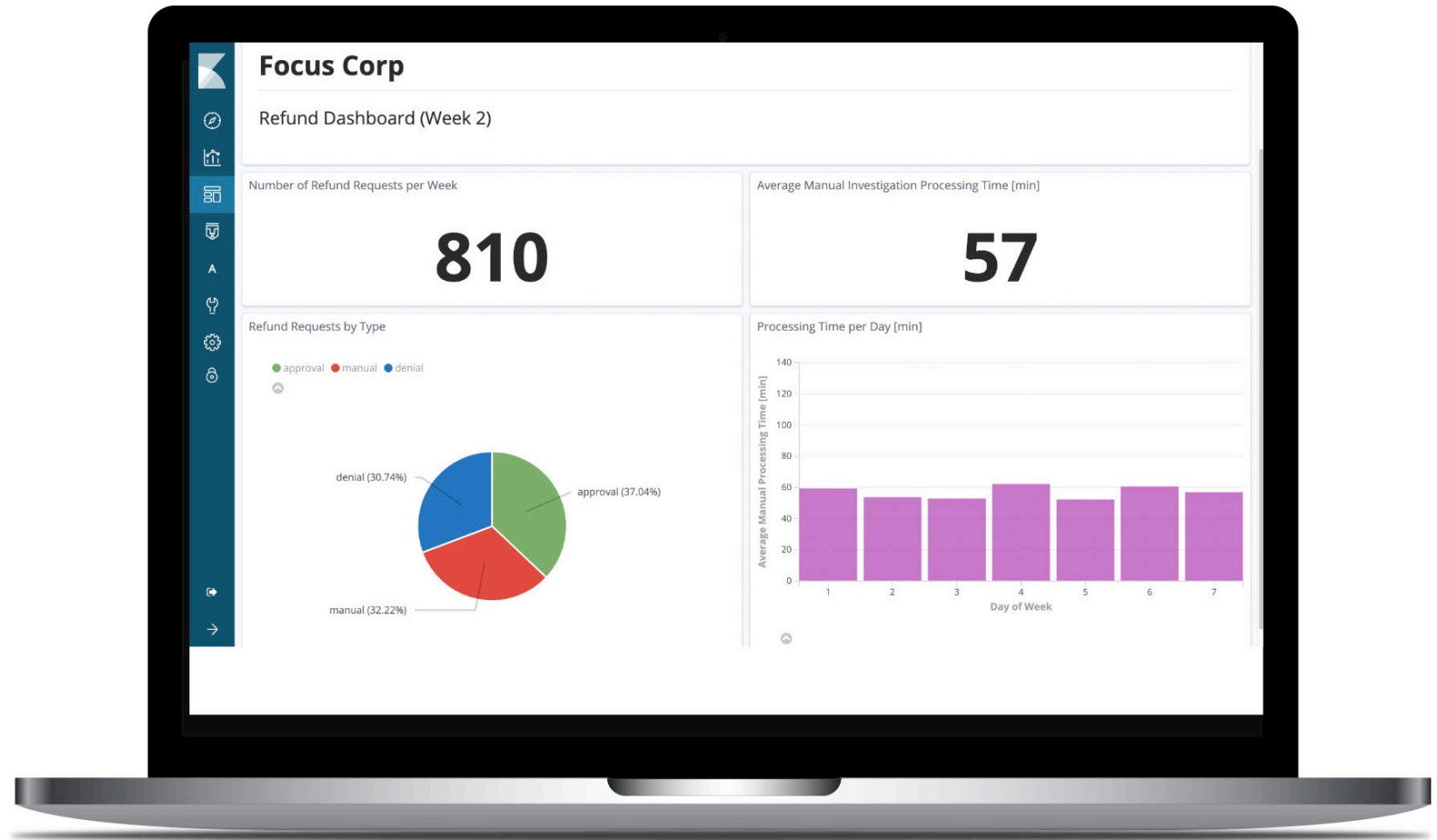
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Automate customer requests

Deliver better customer service with intelligent automation

Following her team's success with Joe's automated workstreams, Linda looks for other ways to improve their performance. She is particularly interested in digitizing and automating some of their processes. Hundreds of customer requests, such as refunds, come in weekly and require manual processing. It has become extremely time-consuming. Each request must be reviewed, classified, routed and acted on quickly and accurately. Linda needs to find new ways to deliver a consistent, scalable experience faster, which means quickly processing and acting on requests.



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Automate customer requests

Make manual work more efficient using intelligent automation

Instead of manually reviewing each refund request, Linda's team uses the AI capabilities in IBM Cloud Pak for Business Automation to read, classify and extract the appropriate data for each customer. Once this part of the process is complete, a decision on how to handle the request has to be made.



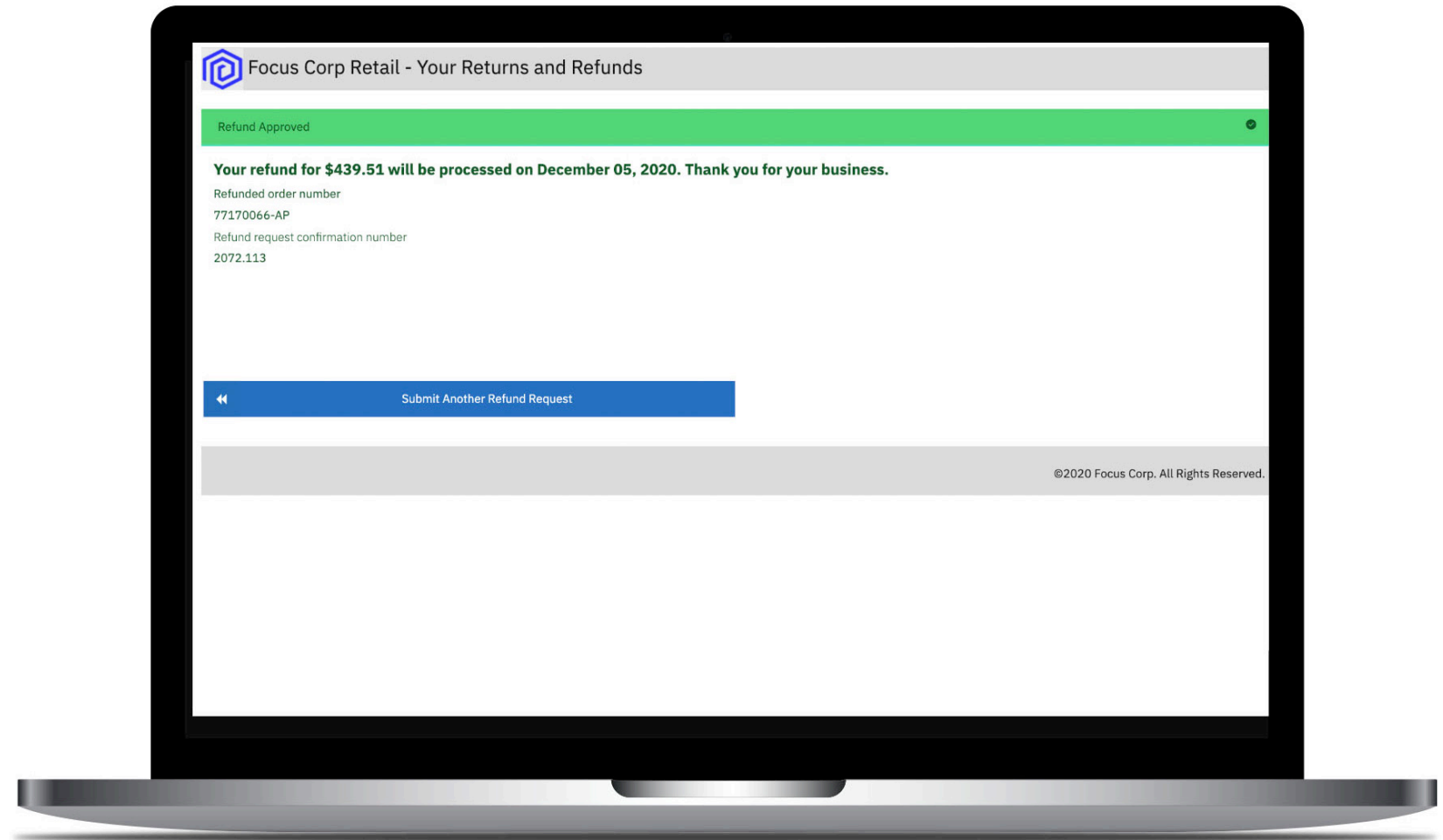
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Automate customer requests

Automatically generate decisions on requests faster

Digital decisioning uses the extracted customer information to route and prioritize each customer's refund request. Based on the priority level assigned, a workflow for issue resolution is created, and the customer is informed of the refund decision.



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Automate customer requests

Make improvements that delight your employees **AND** customers

By automating customer requests, Linda's team has been able to speed overall processing times, freeing them to focus on handling exceptions. At the same time, by reducing the time it takes to process refunds, they have delivered the consistent experience their customers have come to expect.



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Optimize internal processes

Transform accounts payable processes with intelligence

After learning about the improvements the customer and IT development teams realized through AI-powered automation, Janet researches ways to help her improve productivity in her accounts payable department. She is overwhelmed by the ever-increasing invoices she and her team are getting and needs ways to detect issues earlier to avoid downstream rework. Janet looks to IBM Cloud Pak for Business Automation for help reducing time-to-payment through automation of manual tasks.



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Optimize internal processes

Early detection = improved productivity

Manually matching information in invoices with its associated Purchase Order (PO) results in data entry errors and inconsistencies across multiple systems. This decreases the accounts payable team's productivity by slowing down processing, and negatively impacts vendor relations.



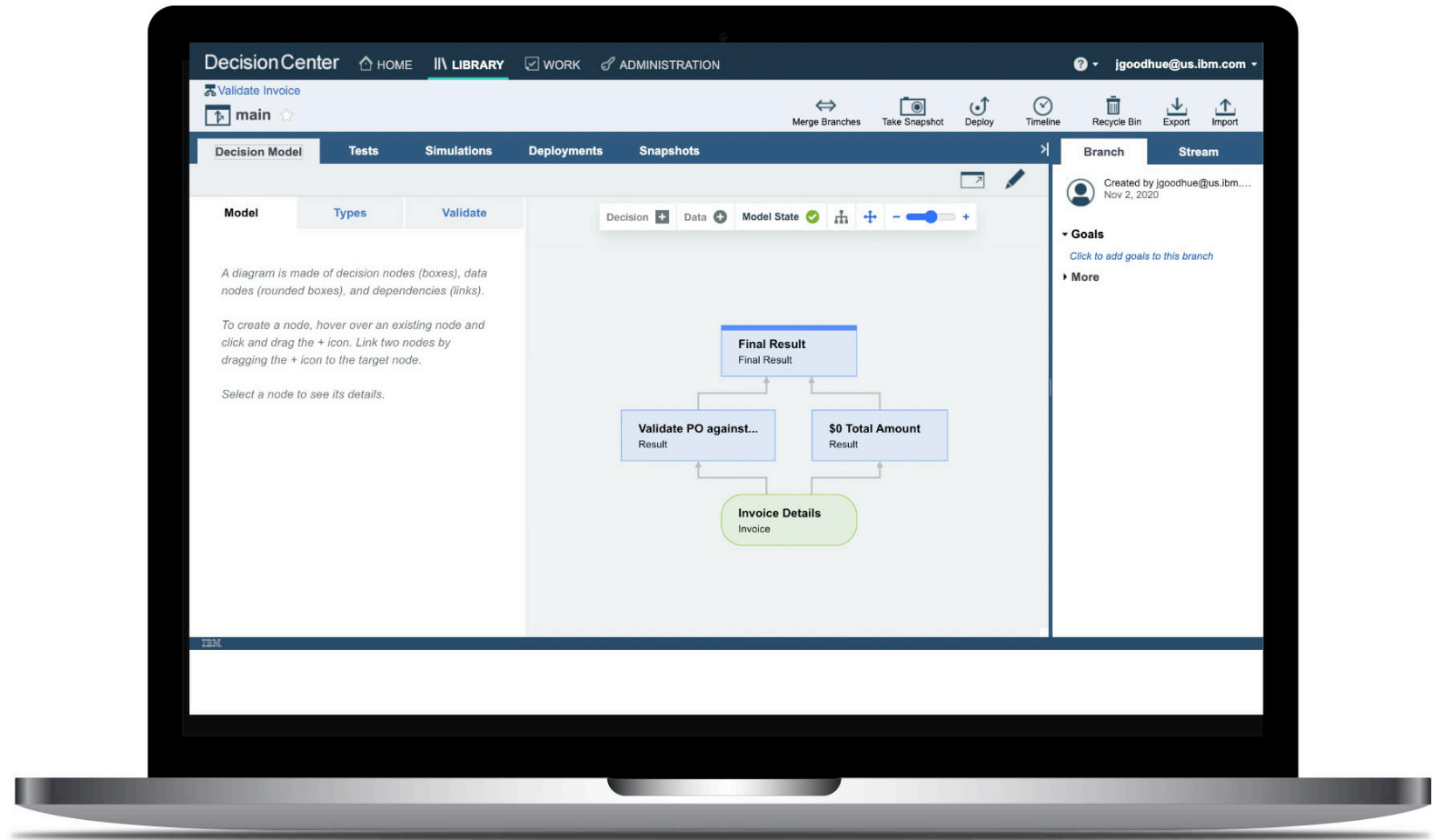
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Optimize internal processes

Visualize processes to find new areas for improvement

Using automation, Janet diagrams the process to resolve each invoice – from capturing and extracting information to validating the PO and making a final decision. She documents it end-to-end, adding decision nodes, data nodes and dependencies as needed.



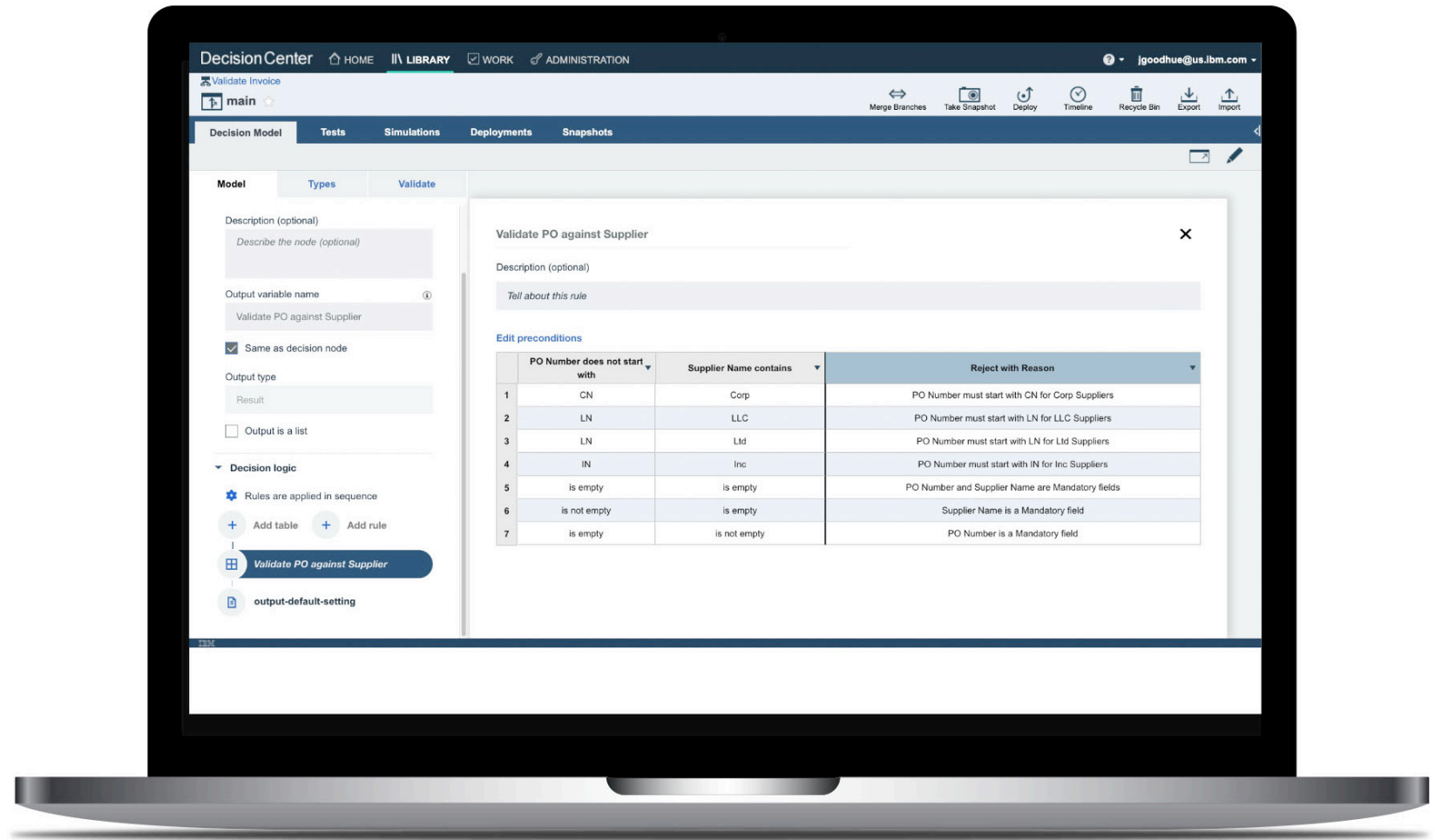
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Optimize internal processes

Create decision models: Apply rules to streamline processes

Janet uses design logic to create and build in business rules that validate invoices against the supplier. They can accept or reject POs based on criteria, such as components of the PO number and parts of the supplier name. Applying these rules helps her team manage invoice data more efficiently.



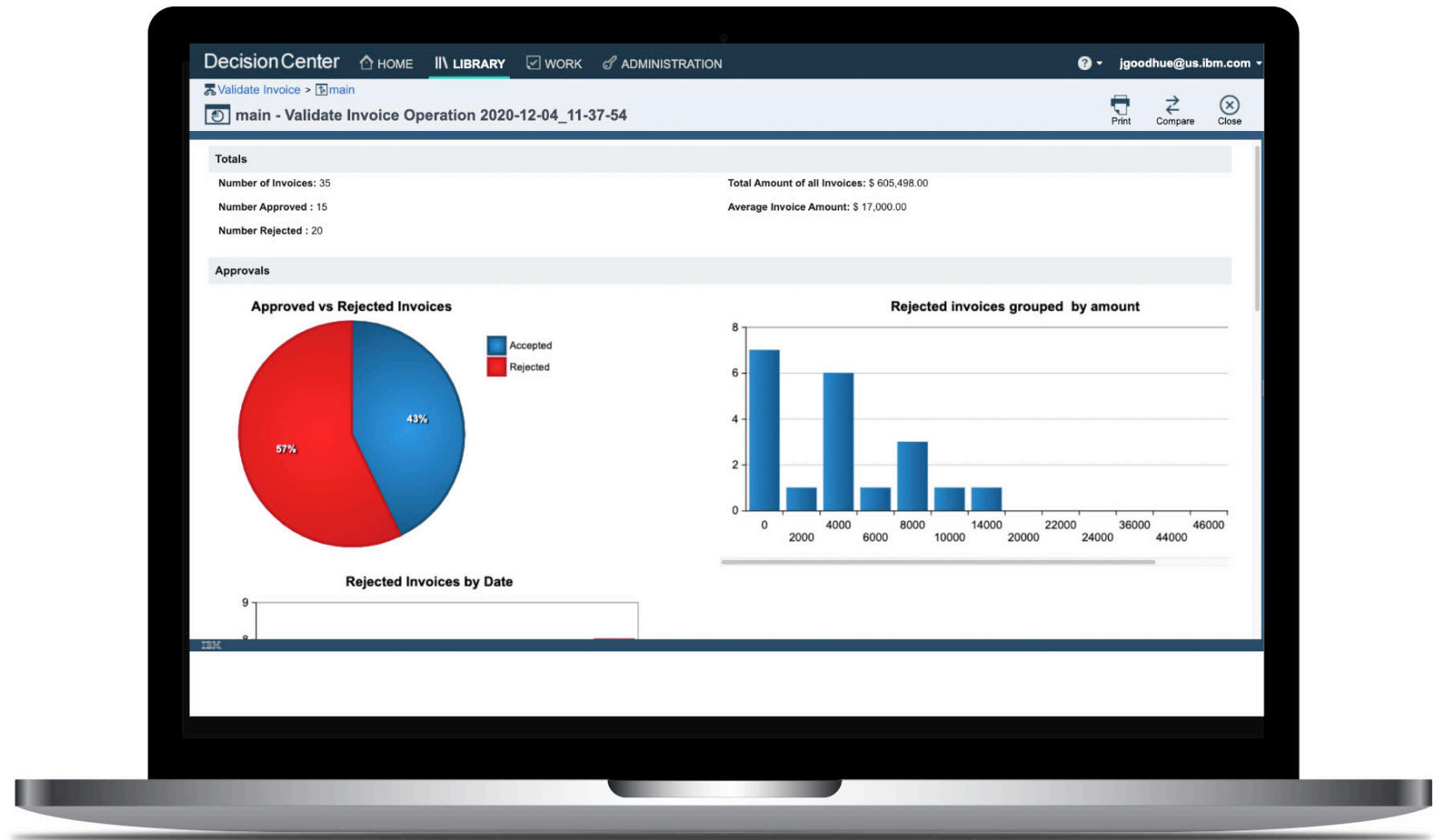
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Optimize internal processes

Decision Center: Visualize process improvements

With the payment now processed in the ERP System, Janet can show details about each invoice and group them according to amount or date. After implementing automation, Janet has successfully streamlined her accounts payable process, reducing manual entry errors and yielding a faster time to payment.



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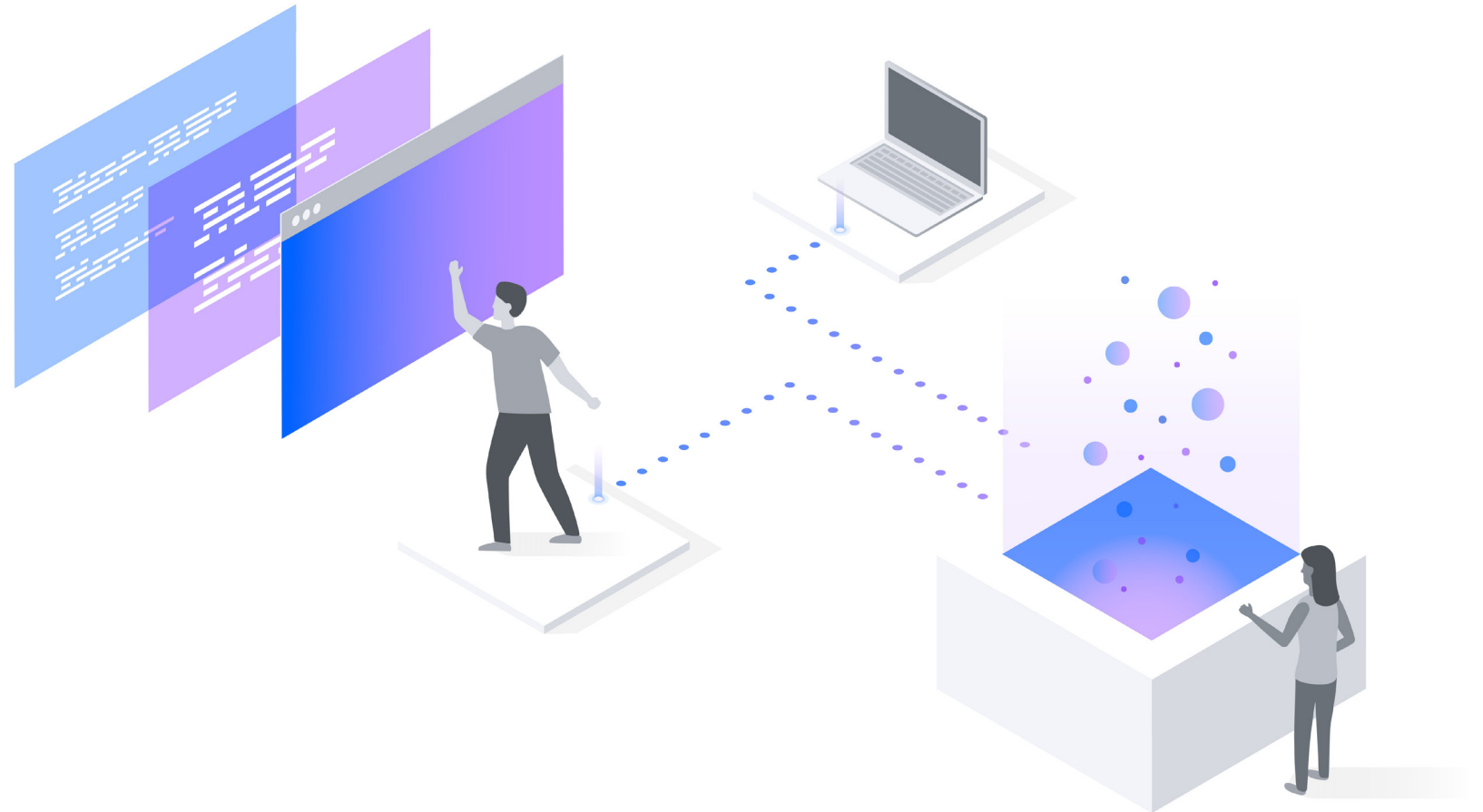
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Optimize internal processes

Achieve better business performance by automating operations

By integrating IBM Cloud Pak for Business Automation into different types of work across the enterprise, Joe, Linda and Janet are all able to streamline internal performance, measure and analyze outcomes as well as create faster customer experiences.



IBM Cloud Pak® for Business Automation Use Case Demo

Achieve better business performance with
AI-powered automation

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