



Automation Partner Checklist

Selecting a Workflow Automation Partner

Selecting a workflow automation partner is a crucial step in ensuring the success of your project. Let's break down the process and provide a checklist to guide you:



Understand Your Problem or Need

- Before seeking a partner, thoroughly understand what drives your desire to automate workflows. Consider factors like quality, cost, turnaround time, and information access.
- Identify pain points in your existing systems and processes. Is it about system integration, handling tasks correctly, or accessing critical information?
- For new businesses, define the unique processes, information, and access requirements that set you apart in the market.



Define the Impact of Your Project

- Assess the cost of investment or criteria for investment size that management is willing to accept.
- Consider factors such as functionality provided, cost reduction, customer retention, and overall business value.



Ideal Solution Exploration

- Imagine an unconstrained scenario: What would the ideal solution look like? Consider all aspects, including functionality, ease of use, and scalability.
- Quantify the value of this ideal solution to your organization.



Find the Ideal Qualified Vendor

- Look for vendors with expertise in workflow automation.
- Evaluate their track record, customer reviews, and case studies.
- Consider factors like responsiveness, flexibility, and alignment with your business goals.

Solution Design



Vendor Collaboration and Flexibility

- Is the vendor willing to discuss and brainstorm solutions with you, even if your understanding of the project is not fully clear?
- Will they do so without imposing significant costs on your organization?



Vendor Experience and Track Record

- How long has the vendor been in the business of workflow automation?
- Consider their expertise, successful projects, and customer satisfaction.



Problem-Centric Approach

- Is the vendor focused on solving **your unique problem**? Or are they trying to fit you into an existing solution designed for someone else?
- Do they ask probing questions to truly understand your specific challenges?



Enhancing Solutions

- Do the vendor's questions and suggestions lead to an improved solution? Are they enhancing your initial ideas?
- A good partner should contribute insights that elevate the system's effectiveness.



Platform Customization

- Does the vendor's system platform already exist as a foundation for customization? Or will it be assembled based on your specific needs?
- A unique solution tailored to your requirements is essential. To avoid sub-optimization, ensure your solution aligns precisely with your business processes.
- If the platform doesn't exist, inquire about testing validation and transactional scalability.

Solution Costs

- Is the vendor's platform provided at an upfront fixed estimate based on your approval of the definition of requirements?
- Is the vendor willing to offer pricing models based on transactions or resource usage? How long are they committed to maintaining that pricing structure?

Solution Implementation/Timing

- Can you, as the customer, implement the solution using only business resources, or do you also need to provide technical staff?
- What is the estimated implementation timeline? Will it take a couple of months, six months, a year, or longer?

Post-Implementation Support

- What are the support costs after implementation, considering the daily ongoing changes that businesses face?
- How quickly can your vendor implement those changes?
- What will be the associated cost?
- What level of involvement will you require to implement these changes or adapt to the new system?

Choosing the right partner can significantly impact the success of your workflow automation initiative. Take the time to find a vendor who understands your needs and can deliver the ideal solution for your organization. Finding a partner who aligns with your vision and can provide a customized, effective solution is critical to successful workflow automation.

At Horizontech, we leverage our unique platform, XperTran, which boasts over 20 years of experience handling various transaction types and workflows. Our “concierge” technical and operational staff will engage with you from the outset, understanding your business needs during an initial call. We’ll tailor a solution precisely to your requirements and typically deliver it within 30-60 days of your approval. Our communication structure ensures availability when you need us—we function as your back office for the business processes we handle. Moreover, any identified changes are swiftly implemented, often within hours or days, rather than waiting for scheduled software releases. We pride ourselves on being your business partner from day one. Feel free to contact us to set up a call about your project!

Contact Info

Sales and Solution Inquiries

☎ 434.857.3202

✉ sales@horizontech.com

www.horizontech.com