

Automate Business Process Idea Guide

Welcome back! Today's idea will cover automating your business processes.

Technology is advancing at a staggering rate! Think about what your phone was capable doing even 10 years ago and compare it to today. Now you essentially walk around with a computer in your pocket at all times. Thanks to much of the hardware that came out of these advances, many businesses naturally started to make processes more efficient.

Then after a while, various software advances boosted efficiency in the business process once again, by making more repetitive tasks able to be automated. This strategy is known as business process automation and is oftentimes employed by businesses to reduce cost, as well as improve efficiency. This doesn't mean that there isn't value in the human element of a business however. There are many things that simply can't be done by a computer or automated process. It's by combining the two that we maximize quality and efficiency.

For example, if I were running a membership type business, I would want the sign up process to be as simple and automated as possible for my members. I would have them sign up online, even pay for the service to get it started. Before I let my new members have full access to my content however, I want to collect a signed NDA, or non-disclosure agreement, to protect my company and its materials.

I don't however, want my agents to have to take time to send out the form and wait for any email, and try to collect it themselves like they've had to historically.

Thanks to PlusThis, this process just became a lot easier. Now after my members sign up, I can have a campaign built that will automatically send them a series of emails to complete their registration by uploading their NDA. Inside of these emails I've added a link from PlusThis' File Box Upload feature that will link them to a page on my website to upload their NDA. After they've uploaded the NDA successfully, it will automatically trigger a task for one of my agents to go in and verify the document is signed properly.

This part will need to be manual to ensure that the proper documentation was signed and collected, but it shouldn't take long. Once I've checked the documentation and completed the task, I can have my campaign now move the new member into the next step of the process.

Now with PlusThis I've maximized efficiency in this process without compromising the legitimacy of the NDA.

To learn more on how to set up the File Box Upload feature, follow the link next to this video to visit our support center.