# BPA
Platform

**200+** Examples for
use in your Business

# kfa
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**BPA Platform** has been used extensively worldwide to automate business processes across almost every business function.
We've compiled just some of the roles BPA Platform has filled to reduce costs and improve company performance.

# 200+ Examples for use in your Business

**SOME OF THE AREAS IN WHICH BPA PLATFORM CAN HELP YOUR BUSINESS**
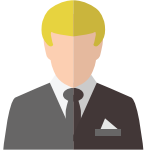
| | | | | |
|---|---|---|---|---|
| Senior Management | Accounts & Credit Control | Purchasing | Manufacturing | Warehouse, Stock Control & Distribution |
| Marketing | Property & Facilities Management | Sales | Retail & Trade Counter | Customer Services & Helpdesk |
| Professional Services | Human Resources and Payroll | Information Technology | Health, Safety & Security | Vehicle Fleet Management |

# 200+ Examples for use in your Business

## Senior Management

- Automatic generation and distribution of management reports
- Real-time alerting on when business rules are broken
- Simplified authorisation via workflow of almost any document - purchases orders, contracts, timesheets, etc
- Notification of key transactions such as customers put on hold, large orders or payments received
- Monitoring of key financial metrics such as bank balances
- Monitoring of aged debt with alerts to directors at key milestones
- Reduced exposure to risk through automation of regular credit checks on customers
- High quality, up-to-date information, from across multiple systems
- Reminders for submission of key documents required by legislation
- Automated exception reporting
- Less time spent checking and searching
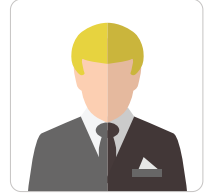
## Accounts & Credit Control

- Alert staff when key activities occur in finance / ERP systems:
  - ☐ Customers put on hold
  - ☐ Orders waiting for manual release
  - ☐ Credit limit change requested
- Inform sales people of daily, weekly, monthly sales
- Distribute news of payments received
- Alert directors of aged debt situation
- Print debt chasing letters automatically
- Schedule debt collection phone calls automatically
- Warn about unallocated invoices
- Notification when invoice is allocated to the wrong nominal code
- Alert if goods are shipped but no invoice is raised
- Print / email monthly statements automatically
- Run and distribute key financial reports
- Simplify authorisation processes such as purchase requisitions and purchase orders (see also 'Purchasing')
- Automated, regular credit referencing of customers via services such as Creditsafe
- Publishing key stats to SharePoint or other company intranet or distribute them via email in popular formats such as PDF and Excel
- Reminders for annual returns such as tax and VAT

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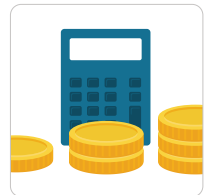
## Purchasing

- Stock level warnings – too high, too low
- Short shelf life stock warnings
- Purchase order authorisation workflows with support for complex authorisation hierarchies driven automatically by nature and value of goods being purchased
- Warnings of upcoming manufacturing requirements
- Details of new sales or projects won
- Chasing suppliers asking them to confirm POs have been received
- Chasing suppliers for confirmation that goods will be delivered on time
- Warning when an item is receipted into stock with margin that is too low or has been receipted at a buy price that is different to the expected cost price
- Seasonal stock warnings
- Spot documents not properly completed e.g. POs with no duty rate
- Alerts showing goods due in that have not turned up on time
- Automated price change notifications to sales team whenever a price is altered
- Order confirmations sent automatically to suppliers
- Identify unusual trends in product use or sales

## Manufacturing

- Automated calculation and distribution of KPI reports such as productivity levels
- Reminders sent automatically to staff who have not submitted timesheets
- Reports showing goods / orders to manufacture
- Notification when back-ordered stock has been received
- Warning when goods due in to today / this week have not been received
- Automated utility usage monitoring and warnings when using deviates from norm
- Monitoring of equipment performance with alerts sent via text message
- Service reminders on manufacturing equipment generated automatically
- Notifications to other departments when manufacturing of key orders is complete
- Automated production and delivery of documents required by law such as:
  - ☐ Safety Data Sheets required by REACH legislation
- Checking manufacturing progress is adequate to hit target delivery dates
- Regular production of stats required by quality schemes such as ISO and Six Sigma
- Out of hours notification when key orders have completed manufacture – often requested by directors

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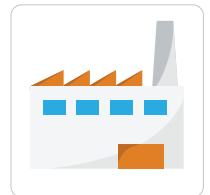
## 📊 Warehouse, Stock Control & Distribution

- Stock level warnings – too high, too low
- Slow moving stock identification
- Short shelf life stock warnings
- Alert if excessive time is taken to pick an order
- Delivery ETAs sent automatically to customers when sales orders received – these can be sent by email, fax or text message
- Goods dispatched notifications sent to customers
- Warnings of large stock movements due
- Automatic notification of any sales orders left open so they can be closed to permit picking to start
- Alert if a customer is put on credit hold while an order is in the process of being picked for them
- Warning when an item is receipted into stock with margin that is too low or has been receipted at a buy price that is different to the expected cost price
- Reminders sent automatically to staff who have not submitted timesheets
- Update web shops with details of products currently in stock
- Publish real-time stock availability information to SharePoint, other intranets and web shops
- Allowing customers and sales staff to check stock levels of a product simply by sending a text message or email to BPA Platform
- Chasing suppliers for confirmation that goods will be delivered on time
- Alerts showing goods due in that have not turned up on time
- Maintain web based lists of planned delivery times for easy access by customers
- Out of hours notification when key orders have been picked and shipped – often requested by directors of companies that operate 7 days a week and have key customers such as the major supermarkets
- Automated calculation and distribution of KPI reports such as inventory reports
- Automated delivery of stock adjustment reports to managers to keep them informed of what stock adjustments staff are making
- Monitoring of equipment such as chilled storage and freezers with alerts sent via text message
- Service reminders on warehouse equipment generated automatically
- Service and road tax reminders for vehicles generated automatically
- Automated production and delivery of documents required by law such as:
  - ☐ Safety Data Sheets required by REACH legislation
- Regular production of stats required by quality schemes such as ISO and Six Sigma

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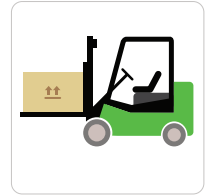
## 📢 Marketing

- Automation of key marketing campaigns such as:
    - ☐ Appointment making
    - ☐ Upgrade / up-sell / cross-sell marketing
    - ☐ Reminders to order (for companies selling consumables)
- Automatic notification when leads generated by marketing activity and passed to sales team are not followed up in target timescale
- Automatic chasing of salespeople for feedback on leads generated by marketing
- Monitoring of telemarketing activity and success rates
- Alerting if any key customers or prospects have not been touched by marketing activity recently
- Alerting Account Managers when their key customers follow links in marketing emails
- Maintenance of reporting dashboards showing key marketing metrics
- Welcome letters / emails automatically sent to new customers
- Allow customers and prospects to use text messages to request details of items for sale, an example being estate agents who put codes and a mobile number on For Sale boards – texting the property code in to BPA Platform sends the enquirer details of the property including the current asking price
- Monitoring marketing databases and CRM systems for poor quality data, missing data and potential duplicates
- Reports showing products being kept in stock that are not listed on the company's web shop
- Publish current call centre telephone waiting times and activity to large screens
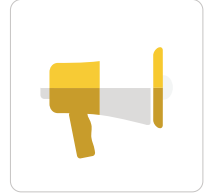
## 🏠 Property & Facilities Management

- Sending reminders of electrical and gas equipment due for testing or servicing e.g. PAT testing
- Sending reminders of properties due for a maintenance inspection
- Sending rent reminders to tenants automatically by post and text message
- Automating alerts sent by conveyancers informing buyers when property searches have been done
- Sending management reports to landlords automatically
- Allowing prospective purchasers to request more details by simply sending a text message when they are standing outside a property
- Allowing tenants to enquire about their rent situation via text message
- Allowing tenants to request property repairs via text message
- Allowing tenants to request rent statements via text message
- Issuing reminders of rent reviews
- Maintaining up-to-date web based lists of properties for sale

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## 📈 Sales

- Workflow to automate the process of having quotes and proposals authorised by managers
- Workflow to automate the process of having discounts authorised by managers
- Automated follow up of sales opportunities that have not been chased for 'x' period
- Sales forecast reports generated and distributed automatically
- Automated updating of price lists through integration with systems of key suppliers
- Allowing customers and sales staff to check stock levels of a product simply by sending a text message or email to BPA Platform
- Cash received reports sent directly to sales people
- New enquiries highlighted to sales people quickly
- Sales league tables distributed automatically
- Weekly / monthly activity reports generated automatically
- Chasing sales people who have not submitted activity reports or other documents
- Alerting sales people when their activity levels fall below pre-set thresholds
- Highlighting quotes / proposals prepared with unusually low margin levels
- Alerts to sales people when one of their customers gets put on credit hold
- Summaries of recent orders placed by their customers sent to sales people
- Orders received or goods dispatched notifications sent immediately to sales people in relation to key customers
- Notification to a sales person when another person, for example a member of the customer service team, speaks to one of their customers
- Notification to sales people when their customers place technical support calls or these are escalated
- Price changes automatic distributed to the sales team

# 200+ Examples for use in your Business

## Retail & Trade Counter

- Automated reports including:
  - ☐ Store sales
  - ☐ Stock levels
  - ☐ Productivity
  - ☐ Inventory losses / shrinkage
- Automation of marketing including that associated with loyalty schemes
- Identification of regular customers who have changed their buying pattern
- Reminders sent automatically to customers who buy consumables: 'Don't run out'
- Reminders sent automatically to staff who have not submitted timesheets
- Stock level warnings: too high, too low
- Short shelf life stock warnings
- Automatic distribution to stores of:
  - ☐ Price changes
  - ☐ Remove from sale notices
  - ☐ End of line information
  - ☐ Delivery schedules
- Chasing suppliers for confirmation that goods will be delivered on time
- Seasonal stock warnings
- Identify unusual trends in sales
- Update web shops with details of products currently in stock and pricing
- Allowing customers and sales staff to check stock levels of a product simply by sending a text message or email to BPA Platform
- Automatic emails and text messages to customers: 'Your goods have been shipped'
- Allowing customers to subscribe to company news services like product updates or special promotions
- Out of hours notifications by text message to directors of store takings
- Automated delivery of stock adjustment reports to managers to keep them informed of what stock adjustments staff are making
- Monitoring of equipment such chilled storage and freezers with alerts sent via text message
- Reports showing products being sold in a company's bricks-and-mortar stores that are not:
  - ☐ Being sold on their web shop
  - ☐ On display in their trade showroom or portfolio samples
- Reports listing discontinued or out of stock items that must be removed from sales / display in showrooms or portfolio samples

# 200+ Examples for use in your Business

## Customer Services & Helpdesk

▶ Automatic notification to support team when new customer service or support calls are received

▶ Automated allocation of support calls based on the nature of the problem

▶ Notification to the customer via email or text informing them of the ETA of spares or an engineer should these be required

▶ Regular updates to customers keeping them informed of progress on their issues can be automated

▶ Highlighting to support staff support calls that are approaching SLA milestones

▶ Automated escalation of unresolved support issues

▶ Automated closure of tickets e.g. if customer does not provide a timely update after trying a suggested fix

▶ Regular generation of reports for each customer showing the support they have received recently, to help reassure them of the value of the support service they are being provided with.

▶ These reports typically show:

  ☐ Cases opened in past month

  ☐ Cases closed in past month

  ☐ Cases still open

  ☐ Average response time

  ☐ Average resolution time

▶ Automated communication encouraging customers who make support requests by phone to switch to using the provider's web based portal in future

▶ Returns tracking - generate automated reports from returns handling systems to highlight which products are being returned most frequently

▶ Issuing renewal of annual contracts can be automated

▶ Warranty due to expire shortly reminders to customers - possibly offering them extended warranties

▶ Automation of internal reporting on performance such as closure rate on first call and average time to resolution.  These reports could be published to SharePoint, another intranet system or delivered via email in popular formats such as PDF and Excel

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## ⚖️ Professional Services

▶ Informing team members when new cases are received that will involve them

▶ Internal alerts to all staff who need to know when a new client has been taken on and fully entered into internal systems such as practice management and project management software

▶ Automated letter production to inform clients of progress with their case, ideal for solicitors, conveyancers and similar professionals

▶ Monitor overtime worked and inform directors when thresholds exceeded

▶ Reminders for annual returns

▶ Automated reminders to clients to submit information or issue instructions required for annual returns such as tax and VAT

▶ Reminders for project milestones and deadlines

▶ Monitor progress of jobs 'vs' deadlines

▶ Monitor whether jobs have been finished within 'target completion time'

▶ Warn about invoices raised without a project code

▶ Automation of fee collection letters using filters to exclude those clients recently contacted about their debt

▶ Weekly lists of overdue debts, so staff know the debt situation of each customer when speaking to them on the phone

▶ Inform directors when debts reach significant ages

▶ Improvement of data quality by comparing information held on clients in various internal databases and identifying incomplete or inconsistent data, such as missing or inaccurate addresses

▶ Identifying clients who haven't issued any instructions in a given period

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## Humans Resources & Payroll

▶ Holiday requesting workflow to simplify passing requests to managers for authorisation

▶ Holiday reminders to encourage staff to use their holidays evenly throughout the year

▶ Requests to employees for details missing from HR records - next of kin, phone numbers, etc.

▶ Monitoring of time and attendance records and alerting when anomalies are found such as regular lateness or excessive overtime

▶ Alerting directors with details of how much overtime people are working

▶ Sickness monitoring with alerts sent if an employee has an abnormally high number of sick days

▶ Probation period monitoring: generating alerts to the relevant managers when an employee's probation period is nearing its end

▶ New starter welcome emails: including details of who they report to, what they are responsible for, details of procedures relating to expenses and holiday booking procedures, directions to company intranet, etc

▶ Chasing employees for overdue timesheets or asking them to re-submit if they were incomplete

▶ Chasing employees for missing payroll information such as bank details and P45s

▶ Alerting managers when staff leave

▶ Alert the team when a new member of staff starts

▶ Allowing employees to use a simple text message to check how much holiday they have left. The text message is received by BPA Platform which then finds how much holiday the sender has left and sends the information back to the employee as a text message

▶ Providing easy checking of staff rotas. For example, some companies how have emergency staff on call allow their managers to query staff rotas by text message. This ensures that even at 3am they can quickly and easily find out which member of emergency staff is on call

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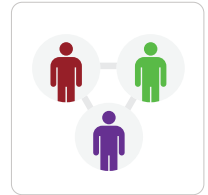
## Information Technology

- Automatically generating and distributing reports from information spread across a wide range of a company's systems - this can free up a considerable amount of time for many IT departments
- Keeping information on intranets up to date
- Automating movement of information between disparate IT systems
- Simplifying integration with IT systems used by suppliers and customers
- Monitoring that key websites are working properly - sending alerts via text message if they are not
- Monitoring that key software packages, such as financials systems, warehouse and time recording systems, are working properly - sending alerts via text message if they are not.
- Checking available hard disk spaces on servers: sending alerts if this falls below preset thresholds with the option to do automated deletions from Temp folders
- Avoiding the need for new skills through use of a graphical, drag and drop user interface
- Reducing the number of places from which automated tasks have to be administrated
- Providing automatic rollover and resilience to ensure automation is never interrupted
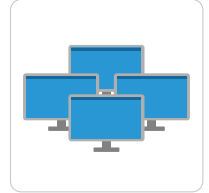
## Health, Safety & Security

- Machinery service and safety check reminders sent to factory managers
- Vehicle service and safety check reminders sent to drivers of company cars or fleet managers
- PAT testing reminders sent to owners of electrical equipment including laptops reminding them to have it tested
- Automated production and delivery to customers of Health & Safety related documents required by law such as Safety Data Sheets required by REACH legislation
- Automation can be provided to chase any staff who do not confirm they have fulfilled instructions sent to them in Health & Safety reminders
- Reminders to submit compliance documentation before the relevant deadlines
- Generate alerts by email or text message when there is unexpected access to buildings or restricted zones
- Monitor property access control systems for unusual patterns of access and highlight these to the security manager for investigation
- Alerting security manager when staff leave the company to ensure their door access card is deactivated
- Alerting security manager when a new member of staff is recruited so that they can be issued with a door pass and other security related items

# 200+ Examples for use in your Business

## 🚗 Vehicle Fleet Management

▶ Reminders sent automatically to drivers of company vehicles
or fleet managers for:

- ☐ Services
- ☐ MOT
- ☐ Road Tax

▶ Requests sent automatically to drivers of company vehicles asking them
to confirm details held by the company of their:

- ☐ Motoring offences
- ☐ Driving licence points
- ☐ Recent accidents and insurance claims

▶ Reminders to conduct safety checks sent to drivers of company vehicles instructing them
to check:

- ☐ Tyre pressure
- ☐ Depth of tread
- ☐ Brake wear
- ☐ Oil level
- ☐ Water level

▶ Automation can be provided to chase any drivers that do not confirm they have fulfilled instructions sent
to them in reminders

▶ Automation of fleet status reports

▶ Monitoring of vehicle mileage and fuel usage – alerts generated when usage deviates from the norm

There are unlimited examples of how BPA Platform is used to automate unique and precise business processes, big or small.

> The Scope of the tools available with BPA Platform are really beneficial. I am constantly suprised and pleased by the adaptability of BPA Platform. I can't think of any occasions where I've looked at something we might want to do with BPA Platform and it's not been possible.
>
> Steve Owen
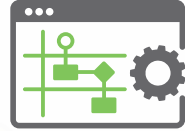
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Discover how KFA Connect can help your business by improving performance, boosting efficiency and cutting costs.

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