



STARK COUNTY BOARD OF DEVELOPMENTAL DISABILITIES

How Moving to AgilePoint Workflow Future-Proofed Business Process.

About Stark County Board of Developmental Disabilities

Stark DD connects individuals and families with the services that persons with developmental disabilities need for health, safety, education and quality of life.

Approximately four million Americans have developmental disabilities. Developmental disabilities can occur in any family, no matter what their ethnic, economic, religious, or political background.

Future-Proof Process Details

- ERP – N/A
- Microsoft Office
- ECM - SharePoint
- Business Process Management (BPM) Solutions – CPS/AgilePoint replacing prior workflow product, plus Process BI.

Process Challenge / Resolution

Stark DD, like other companies, had a tough workflow process decision where their on-premise workflow vendor ended the life of their existing product. Facing the challenges to replace their workflow platform, Stark DD had to decide on a flexible Robotics Process Automation (RPA) approach that could provide cloud and/or on-premise functionality. A key requirement was a concurrent licensed RPA workflow platform with the ability to future-proof SharePoint, ERP and/or CRM platforms.

Stark DD's Future Proofing Business Process Rationale:

- Current form and workflow (RPA or BPM platform) was end of life, not cloud-enabled or concurrently licensed.
- Current business process platform was tightly coupled to SharePoint.
- Wanted increased process flexibility around ERP, CRM upgrades and customizations.
- Wanted to maintain compliances with other software versions and didn't want to risk losing running business processes (SharePoint 2010 to 2013 or SharePoint 2013 to SharePoint Online).

Clear Process Solutions

Process Benefits

Stark DD, a long-time workflow BPM customer, partnered with CPS process architects / LEAN data experts to fast track results, such as:

- Rapidly transitioned BPM workflow platform to AgilePoint.
- Launched new process platform without changing or recreating business processes.
- Able to integrate with cloud or on-premise systems, now and in the future.
- Low-code approach saving time and money.

Future-Proofed Workflow

Leveraging CPS resources for their most complex business processes and internal resources for others, Stark DD could move to a true future proof business process management technology platform. Six business processes could be converted over to the new platform in one month. While working with CPS, their highly trained staff understood how to make this simple yet affordable. Stark DD has truly achieved the freedom to be technology independent, so as when the business changes, they can adapt even faster than before at half the cost.

- Partnering with CPS, Stark DD began rapidly converting six business processes in under a month. Some examples are:
 - PO Request
 - Work Orders
 - Mileage Reimbursement
 - Employee On-Off Boarding
- Process BI for AgilePoint was added to visualize, track, and improve business processes.

“Moving to AgilePoint wasn’t just fast, it was a vast improvement in our journey to future-proof RPA workflow.”

- Scott Marsh, IT Director, Stark DD

Digital Transformation – Lean Data & Processes

Today, more and more companies are automating around ERP, CRM and PLM systems, avoiding custom-coded solutions and separating their business process from their business data. Robotics Process Automation (RPA) platforms are set up for unprecedented growth. Common processes are being automated, such as the following:

| Common Workflow Automations | Department Often Impacted |
|------------------------------------|---------------------------|
| New Customer Account | Credit Department |
| Time Off Request | Credit Department |
| Weekly Attendance | Credit Department |
| Bill Only Request | Customer Service |
| Credit Memo Request | Customer Service |
| Cycle Count Request | Customer Service |
| Fixture Request | Customer Service |
| Product Help Request | Customer Service |
| Refund Check Request | Customer Service |
| Cardholder Purchase Log | Finance |
| Mileage Reimbursement | Finance |
| Purchase Order Request | Finance |
| Returns Merchandise Automation | Finance |
| Work Order Automation | Finance |
| Employee on/off - Boarding | HR |
| System Help Request | IT |
| Time Off Request | IT |
| Weekly Attendance | IT |
| Sales Tools Request | Marketing |
| Engineering Change Request | NPD / Engineering |
| Engineer to Order | NPD / Engineering |
| New Product Development Automation | NPD / Engineering |
| Project Time Tracking | Project Leap |
| Event Line Worksheet | Purchasing |
| Quality Assurance Resolution | Quality |
| Program Change Request | Sales |

About Clear Process Solutions

Clear Process Solutions (CPS) assists companies in improving internal processes, cross system integration and data mobility via modern workflow, robotic process automation and BI Insights. Our team of deeply experienced ERP and process experts believes that efficiency and automation are the keys to innovation, cycle time reduction and cost savings.