EPICOR

5 Reasons Why Automation Studio Will Future-Proof Wholesale and Distribution Businesses

Introduction

When you chose to incorporate an ERP solution into your business, you took the first step in the digital transformation journey–preparing to not only survive but thrive in an increasingly technology-driven world.

You can think of Epicor's Automation Studio, our newest offering, as the next step towards future-proofing your business. An Intelligent Automation Platform embedded into Epicor's software, and powered by our partners at Workato®, Automation Studio is designed to help makers, movers and sellers streamline their workflows, add robotic process automation, bridge the IT/business gap, and propel your business forward with newfound efficiency and insights. To put it simply? It's all about less work, and more flow.

In this eBook, we're going to take a look at:

. The state of the Distribution industry today, and where we're headed.

. The importance of Digital Transformation in Distribution and why automation is at the core of this effort.

. 5 reasons Epicor's Automation Studio is uniquely equipped to help distributors do better business.
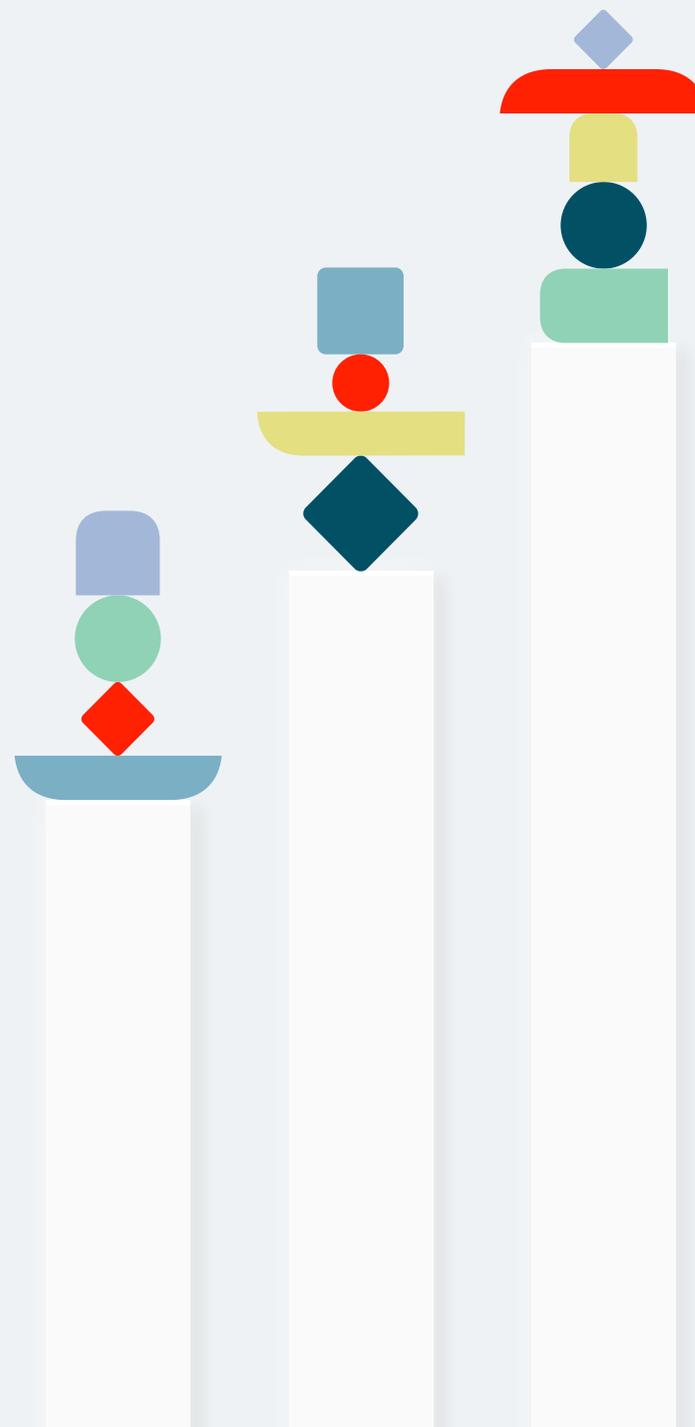
Distribution Today and Tomorrow

Current State

The Distribution industry, much like the rest of the world these days, is changing rapidly. The supply chain has been under tremendous strain with unprecedented customer demand, a labor shortage, and the need to catch up with technological advancements to stay competitive in the market.

When we look at the realities of business today, and we forecast future challenges, there are a few key considerations we think every distribution leader needs to keep top of mind as they plan:

Labor—or lack thereof—will continue to play a defining role in the new world of distribution.
Labor shortages – caused by older generation workers retiring at a faster pace, and a lack of younger generation workers taking their place – is a challenge we hear about often these days. And for good measure – it is a real issue that needs to be addressed in terms of how we attract and retain talent. However, it's more than just making sure roles are filled. Moving forward, Distribution leaders need to ensure their talent has the training, upskilling, and technical acumen needed to evolve along with the technology they use daily.

The world will depend more and more on technology.
While no one can predict the future, we feel confident saying that the world will become more and more dependent on technology to operate. And not only that: technology will become dependent on technology; it will be crucial that the applications we use can talk to and understand each other. We've learned that data silos dispersed across business applications yield more busy work for employees, leaving less room for analysis and innovation.

Agility and customer service will differentiate you from the competitors.
Consumers are asking more of their retailers today than ever before. They want tailored, expedited experiences, along with top-notch service. The distributors who can build resilient processes, and shift their focus to providing quality customer service, will stand out from the crowd.

While the above points might seem disparate, we see a common thread – and solve – between them: building a digital transformation roadmap. Next, we'll explore why digital transformation is at the heart of future-proofing your business against these challenges, where we're currently getting stuck on the path to digital innovation, and finally, how automation can help.
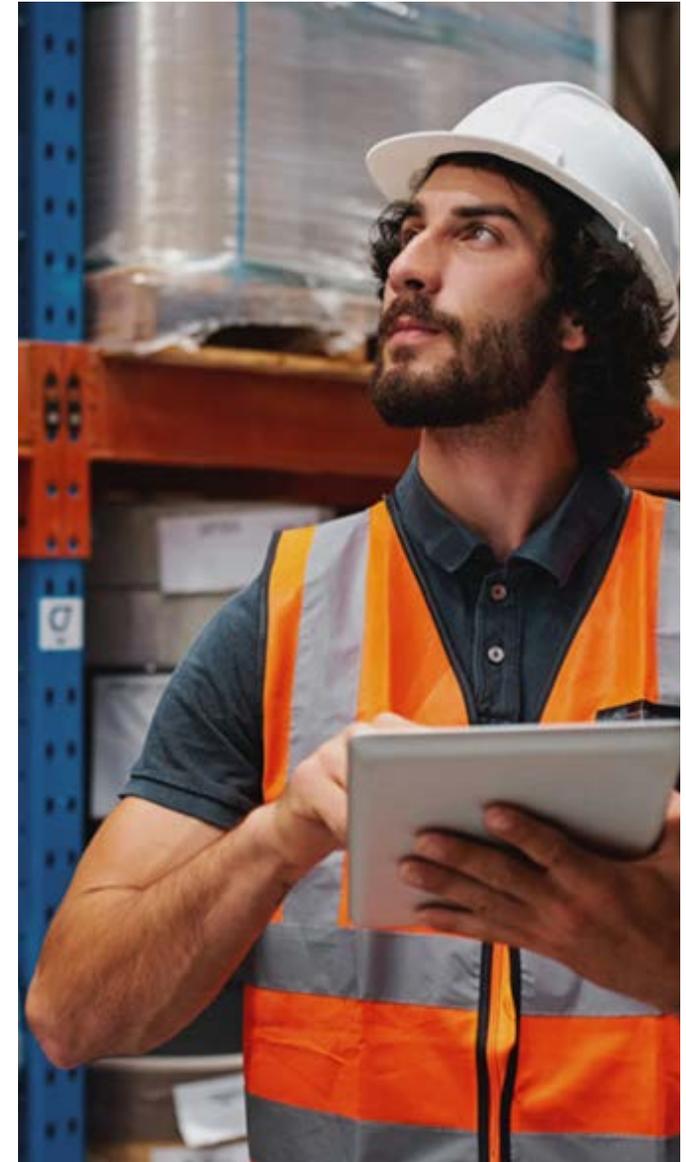
Digital Transformation Defined

In our Digital Transformation: A Playbook for Distributors eBook, we define digital transformation as the act of integrating digital technologies to replace older processes and technologies to create new value, ultimately driving quantifiable impacts on your business.

To break this down further, we can look more closely at the components that make up this definition:

"Digital Technologies" refers to any enabling digital technology—not just artificial intelligence (AI), blockchain, or the Internet of Things (IoT). Other digital technologies that are already known and proven, such as Business Intelligence, eCommerce, Cloud, Document Management, and now Integration Platform as a Service (iPaaS) are also critical parts of the Digital Transformation journey.

"New value" can be defined along a spectrum: Improvements, Innovations or Transformations. Improvements make your core business more efficient. Innovations are the acts of creating net new offerings. Transformations involve disrupting the status quo in your industry or supply chain.

"Quantifiable Impacts" means any good Digital Transformation must deliver strategic value in ways that can be measured and monitored. As such, we like to think that to qualify as a valuable and worthy Digital Transformation effort, a business should be able to point to the quantifiable impacts that an initiative will have on the operations of the business and/or the ability to better compete in the current market or new markets.

Looking at the Big Picture

At first glance, digital transformation might seem like a push to center your business around powerful technology. And of course, this is partly true. But it's crucial to clarify that technology is first and foremost a tool. It helps us, as its wielders, build future-proof businesses–but it is not the answer in itself. Digital transformation improves your business through three different but connected lenses: People, Strategy, and Capabilities.
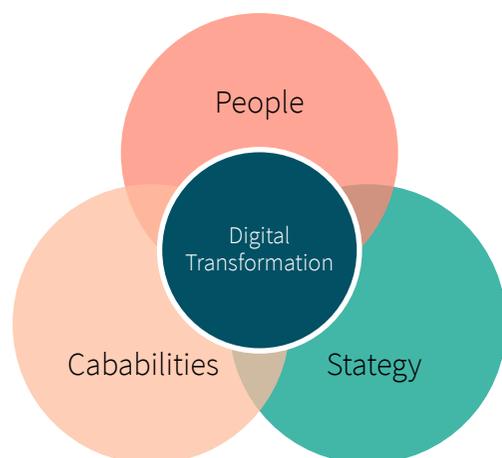
◆ People First

People – your employees and customers – are the foundation of your business, and the changes and advancements you make should center on this question: how can we help them succeed? Whether streamlining workflows or simplifying communications to enhance the customer experience, digital transformation should be a means to elevating performance, adding value, improving data quality, and promoting efficiency for your workers and the customers they serve.

◆ Delivering on Business Strategy

If your team is spending most of its time troubleshooting issues and delays due to running on antiquated technology, you may ultimately find yourself running an IT business instead of a Distribution business! Technology plays a vital supporting role in your company's strategic goals, but it's not the leading player. Digital transformation plans should connect the dots between technological advancements and the strategic outcomes you expect them to yield. The value of technology should always be quantifiable.

◆ Expanding Your Capabilities

In our 2022 Industry Insights Report, application interoperability and integration consistently appeared as a top priority for businesses when considering and comparing ERP solutions. These days, excellent technologies that stand on their own are table stakes. True digital transformation means investing in technologies that are responsive and can easily speak to other applications, allowing your company's vital data to flow freely across channels and into the hands of the people that need it to gain insights and improve upon existing processes.

Roadblocks to Digital Transformation

We've established that digital transformation is our path towards a future-ready business. But, on our journey toward this new way of working, there are a few roadblocks we're likely to encounter along the way. Workato, our Intelligent Automation Platform partner, defines the two most common roadblocks as "Tech" barriers and "Social" barriers:

The Tech Barrier

The proliferation of cloud-based apps and data sources has occurred at a breakneck pace. So much so, that a recent study of a Fortune 500 corporation clocked their supply-chain employees switching between apps, windows, and websites an average of 3,600 times per employee per day. This rapid shift to cloud applications, and the dispersing of data across myriad systems, has created a sudden demand for fast, agile integration capabilities to keep information not only flowing but relevant and useful for everyone who handles it. The opportunity for insightful data to fall through the cracks is a lot higher–and so are business stakes if this goes unchecked.

The Social Barrier

Given the launch into application-driven operations, businesses can no longer rely solely on IT departments to navigate complex technology. We need to empower business users with tools that simplify complex processes and training that improves their digital literacy, ultimately promoting their autonomy.

Clearing the Way with Epicor's Automation Studio

Business Automation
Streamline • Execute • Collaborate

System Integration
Synchronize • Move • Align

Activity Workflow
Notify • Connect • Approve

Open, Connected Epicor
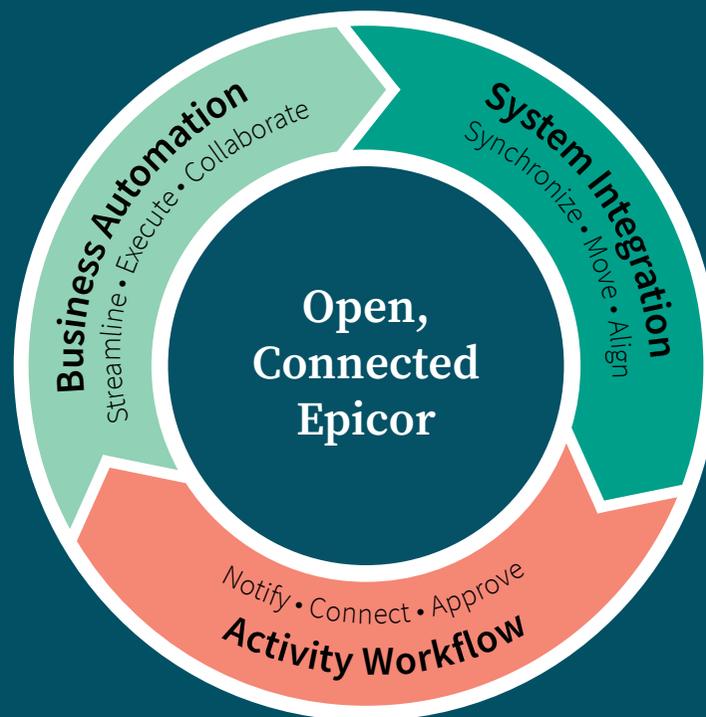
Intelligent Design | Quick Enablement | Low Code | Cloud Ready

What is Automation Studio?

Automation Studio is an automation platform embedded into Epicor's ERP solutions for Distribution that allows your ERP to integrate and automate with the third-party applications and products, as well as automate between subsystems inside the ERP solutions.

How Does it Work?

As a part of your ERP software, this tool allows you to design automated workflows between applications by creating recipes, or instructions, for the automations you wish to create. Automation Studio streamlines and simplifies your tasks by running on triggers, actions that launch a series of tasks in motion.

Why is it Different from Other Integration Tools?

Automation Studio addresses integration automation issues with an enterprise-class integration tool that can be governed and monitored by IT, but that also offers the ease of use and low barrier to entry expected from consumer cloud applications. Instead of asking our clients to adopt yet another integration application that costs more and requires the skills of a high-level developer, we've embedded this automation tool into the Epicor product our customers already know and love at an unparalleled price point, enabling a fast track to digital transformation.

"This is the next level... where Epicor should go."

John Preiditsh | Six Partners

Putting It All Together:
5 Reasons Why Automation Studio
Will Future-Proof Wholesale and
Distribution Businesses

1. Less Work. More Innovation.

As we discussed earlier, one of the megatrends we foresee remaining constant in Distribution is a shortage of labor caused by older generations with deep industry expertise leaving the field and a lack of new talent entering the pipeline. To successfully digitally transform the industry, we need to ask: how can we empower a smaller, younger, less experienced workforce to succeed? Automation Studio can help in a few ways:

Grow Citizen Developers; Upskill a New Generation.

One of the barriers we must break down is that between technology and its everyday business users. We want to encourage the next generation of workers to be "citizen developers," business users who, by a combination of upskilling and user-friendly interfaces, can create savvy workflows on their own, and improve your business operations. With Automation Studio, your team will be able to easily navigate a once IT-dominated process with ease, demystifying both the process and the data that results from it.

Remove or Consolidate Superfluous Tasks.

Amid labor shortages, automation can help fill talent gaps. By utilizing triggers in Automation Studio, a process that would have involved multiple parties across multiple departments will whittle down manpower needs significantly. Not only will this help keep things moving, but it will also mitigate the amount of extra work that would fall on someone else's lap in the case of a talent shortage.

> *"By 2025, more than 75% of the midsize, large and global organizations will establish integration strategy empowerment teams to support collaborative integration, up from 40% in 2021."*
>
> *Gartner Report: Ensure Your Integration Strategy Supports Modern Integration Trends Published February 23, 2021*

2. Less Guessing. More Data and Communication.

Running your business reactively instead of proactively means leaving opportunities on the table when it comes to customer experience, retention, and satisfaction. Excellent customer experiences are built on foresight – knowing what a customer needs - and delivering it to them before they know they need it. But in a fast-paced industry, sometimes you need a helping hand.

With Automation Studio, you can communicate proactively with your customers by connecting Epicor's data with that of your CRM or email client to send tailored reminders and messages to your customers. Those reminders could be as simple as AR Statements, or more complex business logic to remind customers when they have not ordered certain products for a long period of time. In this way, you can use automation to not only stay engaged with your customers, but understand when they have become disengaged.

> *"With 4,100 applications and rising by the day, it just wouldn't be possible [under manual processes.] It would've crushed the organization I think."*
>
> *Chief Executive Officer I Workato Customer*

3. Less Waiting. More Efficiency.

As customer demand grows, so does the need for distributors to find ways to be more efficient in every aspect of their business. As often as possible, we want to close the gap between opportunity and value – both for our customers and for our workforce.

There are a few ways to create more efficient processes with Automation Studio:

Channel Your Inner Master Chef and Whip Up Formidable Recipes

You know your business best. Are there processes you follow that feel redundant and bureaucratic, sacrificing value for a "that's just how we do things" ideology? If so, you can start to change this by designing your own, simple, fast recipes with Automation Studio. From quote-to-cash to customer onboarding to invoicing, the goal is to shorten the time between a need and the desired outcome. This is made more possible with automation technology.

Discover Epicor Industry Templates and the Workato Recipe Library

Epicor provides and maintains Epicor Industry Templates – which are curated recipe collections made with Epicor Distribution users, for Epicor Distribution users. These templates can be examined, downloaded and personalized for specific industry needs. If that isn't enough, Epicor customers get access to Workato's enormous community recipe library as a unique benefit of Automation Studio being powered by Workato. As the title suggests, this library is community generated and maintained, consisting of hundreds of thousands of recipes created by peers who found new and creative ways to streamline their workflows.

> *"The speed to market… is infinitely faster than anything else out there."*
>
> *Enterprise Architect | Workato Customer*

4. Less Room for Error. More Room for Change.

As Distribution adopts more technology to transform its end-to-end operations, agility in the industry will also depend on technical acumen. Manual processes, while perhaps reliable, may prove too stagnant for the speed of evolving business.

Distributors should think of Automation Studio as their process configuration tool. Without the skills of a software developer, you can craft processes or adjust them as needed. Because of the ease of low-code recipe design, you can make changes to your workflows on-demand, to match an on-demand world.
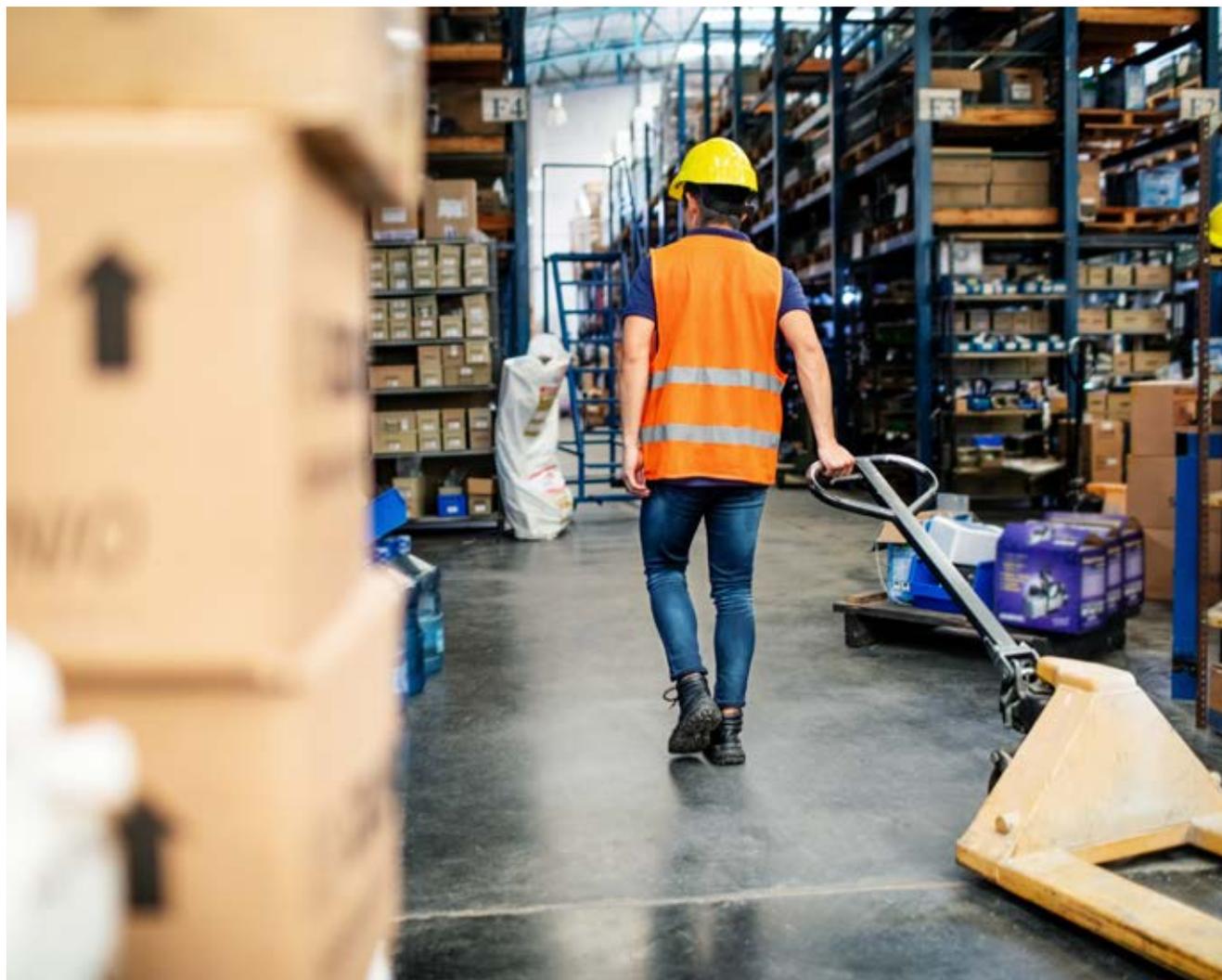
5. Less Stress. More Growth.

Keeping a business above water is one thing; growing it is another. With our solutions, we want our clients to discover new ways to not only maintain excellence but discover new ways to build upon it, without adding strain to their budgets and resources.

Automation studio can help you achieve these goals. With consolidated tasks and processes you'll find that you can do more—reach more people, close more deals and discover more opportunities—with less. Scaling your business doesn't need to be out of the picture just because you're not scaling staff.

> " *[Our] workforce increased to about 43%, but my service desk team didn't increase at all. It remains the same. That gives you another view of scalability.*"

Head of Enterprise End-user Services & Experience | Workato Customer

Conclusion

At Epicor, we use our deep industry knowledge to build solutions that will help our clients stay ahead of the curve, but always true to their business needs. With Automation Studio, we're continuing our commitment to offering a best-in-class, forward-thinking solution for the people who keep the world moving.

Visit our Epicor Automation Studio website.

DISCOVER MORE

EPICOR

We're here for the hard-working businesses that keep the world turning. They're the companies that make, move, and sell the things we all need. They trust Epicor to help them do business better. Their industries are our industries, and we understand them better than anyone. By working hand-in-hand with our customers, we get to know their business almost as well as they do. Our innovative solution sets are carefully curated to fit their needs and built to respond flexibly to their fast-changing reality. We accelerate every customer's ambitions, whether to grow and transform, or to simply become more productive and effective. That's what makes us the essential partners for the world's most essential businesses

Contact Us Today: info@epicor.com | www.epicor.com