May 19, 2020, 08:15am EDT

Want To Automate Your Workflow? Try These 15 Expert-Recommended Tools

Forbes Technology Council COUNCIL POST

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Successful CIOs, CTOs & executives from Forbes Technology Council offer firsthand insights on tech & business.

The market is chock-full of tools that help business teams automate their workflow. But if you're a non-tech business leader, it can be intimidating to evaluate each option and find one that works best for you.

As technology experts, the members of Forbes Technology Council have firsthand experience with many of today's leading automation tools. Below, they recommend 15 helpful tools for automating workflow and getting more done in less time.

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1. Robotic Process Automation Platforms

Robotic process automation (RPA) platforms are efficient tools for automating workflows, but only to a certain extent. RPA is proficient when working with highly-structured data and rules-based processes that require limited human interaction. However, most workflows are complex and variable, which require a higher level of digital intelligence to understand the meaning and context of data and processes. - Anthony Macciola, ABBYY

2. HubSpot

Our marketing automation goals are to streamline, automate and optimize our marketing workflows to increase efficiencies and drive revenue growth. HubSpot automations help us scale our marketing programs, deliver personalized communications and improve lead generation. But most importantly for our complex buyer journeys, it helps us manage the customer dialogue and nurture our customer relationships. - Roark Pollock, Mission Secure

3. AWS

The AWS suite of solutions automates customer workflows. AWS Config, for instance, provides continuous tracking of changes to your AWS resources to ensure you achieve your desired configurations. When a compliance status is not achieved, AWS Config flags the resource as noncompliant for mitigation. - Archie Agarwal, ThreatModeler Software, Inc.

4. Zapier

Zapier is a no-code integration hub that empowers folks to connect services and processes with one another quickly and easily. It takes away the time and challenges of building one-off integrations from code-based API platforms, and puts the power to automate workflows into the hands of those managing the processes. My team and our clients are constantly finding new ways to deploy Zapier. - Dave Landa, Kintone

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5. Google Data Studio

Workflow automation tools must be versatile and simple. Retrieving data from several sources and presenting it in a clear manner is crucial to convey critical information. Data Studio connects to many sources (Salesforce, Google and LinkedIn Analytics, to name a few) and has tools to synthesize this plethora of data to tell a simple story, which leads to informed decisions and higher production. - Ashwini Choudhary, Recogni

6. Nintex

Nintex offers advanced process management, workflow automation and robotic process automation (RPA) capabilities. It seamlessly integrates with business applications such as SAP, Salesforce, Microsoft Dynamics and legacy systems. - Nooshin Yazhari, Optimum Consultancy Services

7. Microsoft Azure

I would recommend the cloud services from well-known manufacturers—for example, Microsoft Azure, a cloud-based platform to host enterprise and hybrid infrastructure. Over 95% of Fortune 500 companies use Azure. The advent of cloud and intelligent technologies has opened new, previously inaccessible opportunities. - Boris Kontsevoi, Intetics Inc.

8. Marketo

Drip campaigns can benefit any business. They allow you to onboard new clients, reengage inactive leads and reward your loyal users. But drip campaigns can take a lot of work to set up and implement. Marketo's software simplifies the process. Not only will it save you a ton of time and effort, but it will transform your drip campaign content into a lean, mean marketing machine! - Marc Fischer, Dogtown Media LLC

9. Standuply

While not an automating tool by itself, we've integrated Standuply with Slack to help facilitate a daily standup meeting with our remote employees. They don't have to log

in to a separate tool as it pops up as a bot inside Slack, which we already use for regular communication. Employees like that it saves them time and effort to participate. - Thomas Griffin, OptinMonster

10. QuickBooks Online

A great tool to automate your business accounting and bookkeeping is QuickBooks Online (QBO), which links to your bank accounts and credit/debit cards to instantaneously and automatically update your books in the cloud. While you'll need to confirm the right classification of certain transactions, QBO offers a very effective tool to automate business accounting and generate up-to-date reports. - Ahmad (Al) Fares, CeliTech Inc.

11. Bubble

I like Bubble, which lets you build pretty complex web apps without really coding. Stitching together blocks and tables to make something that works for folks who don't code. For simpler things—like connecting things together—Zapier.com is the gold standard and works super well. - Russell Smith, Rainforest QA, Inc

12. Parashift

Automating workflow is essential to productivity. Parashift is a tech tool I recommend for automating paper workflows—such as invoices, bills, purchase orders, etc. It's like having a fully autonomous document processing system with you everywhere—and one that doesn't have to be physically located at your office. It gives you the power to virtually automate emails and your inbox. - Robert Weissgraeber, AX Semantics

13. Nexenta

A simple yet effective tool for automating digital files and ensuring security is Nexenta. This simple app is cost-effective and stores all files safely, protecting them from both damage and unauthorized access with easy access for those with the correct credentials. - Alexandro Pando, Xyrupt Technologies

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14. Any Tool That Eliminates Monotonous, Repetitive Tasks

Entrepreneurs don't realize how much time and money repetitive tasks waste. When evaluating automation tools, look for ones that won't disrupt or over-complicate your workflow and instead opt for ones that complement and enhance it. Tools that enable you to avoid monotonous tasks, like scheduling staff or issuing invoices, means using smart solutions as extensions of your team, in lieu of hiring. - Amiad Soto, Guesty

15. Your Customer Service Team

I'll provide a bit of a contrarian answer here and say the "tool" is people. Customers want to know they are being treated personally when receiving a service. If you over-automate, the damage you will do to your brand will massively outweigh the cost savings. It's OK to use Mailgun to send that first outreach, but after, your reply needs to be real, personal and thankful. - Bret Piatt, Jungle Disk

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Forbes Technology Council

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Member Since 2018

Boris Kontsevoi is a founder and President of Intetics Inc., a leading global software engineering and digital transformation company. Under his leadership, a group of software engineers developed into a truly global technology company with multiple professional certifications and industry awards, including the Global Outsourcing 100, Software 500, and Global Sourcing Association best of class company.

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