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Battling Security Fatigue – Working Towards Usable Security

Addressing Security's Weak Link with Workflow and Content Automation

There's a prevailing bias that security is about saying "no." Security should be about saying "how."

Of course we need to lock down access to member records, financial data, systems of record, and so on, but even among those who are authorized to use those systems and access that data, we take it on faith that they've been trained on how to use them and that they adhere to it. That's by no means always the case. While the industry is pretty good at warding off theft, and perhaps mischief, it's still ramping up on warding off mistakes — and mistakes cost money and damage goodwill.

Workflow and Content Automation strives to strengthen that weakest link in the chain. For any given activity, it ensures that data is gathered from the right places, is packaged the right way into documents that make sense, is routed to the right people for review/input, and that the right resulting actions are taken. It can start out as simply as a set of checklists, but each of those should evolve, either through proactive consideration or the reactive postmortems that should follow any crisis.

Ideally, good Workflow and Content Automation tools allow for the following:

* Modeling processes thoroughly, including moving applications back and forth through stages of approvals/rejections, revisions, and modifications.
* Tracking the status of individual process instances.
* Collecting overall metrics on process performance and outcomes.
* Assigning tasks to people and monitoring them to ensure reminders/escalations take place.
* Managing those tasks for users to make them easier to accomplish.
* Automate the content, too. If getting a loan approved still requires manually drawing up an agreement document, we've left ourselves open to delays and errors. Documents should be generated as part of the process, optionally routed to reviewers for fine-tuning.
* Connecting to systems of record to retrieve and update data of record using the right credentials, and only for the right activities; granting a process the right to access data is safer than granting it to a person carte blanche.
* Presenting tasks to users in a way that reduces time and improves their performance.

Referring to this as formalizing best practices might sound friendlier, but it also makes it sound optional — and it shouldn't be. It protects staff up and down the org chart from claims of malfeasance. A repertoire of processes not only ensures the right things happen — it frees up time to focus on higher-value work that can't be automated.

There will still be a temptation to bypass these practices; when that happens, it's a signal to model them better. In fact, actively encouraging improvement is the best course of action.

We've seen finance companies cut loan approval time from over a day to less than an hour using a combination of managed workflow, automated content, curated tasks, and task-optimized forms. Moreover, particularly for the security-conscious, those approvals involve far fewer errors.

The right automation strategy transforms security from denial to guidance – and everybody wins.

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Mike Fitzmaurice is the Vice President of Workflow Technology for Nintex, and in that role he travels worldwide speaking about the benefits of leveraging technology to securely automate business processes inside organizations. Today Nintex helps thousands of customers around the world achieve digital transformation. Operations leaders and IT professionals turn to the Nintex workflow platform to automate processes of all types, pulling together content from disparate sources, from existing enterprise data to content from major ecosystems, such as Microsoft and Salesforce. Learn more by reading Nintex customer success stories at http://www.nintex.com/resources/case-studies including case studies from financial services organizations like ANZ Bank and Braunton Capital.

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