

## Transforming Process Design & Management with BusinessOptix

### Case Study



### Summary

- Financial services organisation had an objective to transform their customer-facing process design and management practices
- Journey started with creation of continuous improvement team who's first task was to transform the claims management process
- Identified that new tool required to support transformation
- BusinessOptix introduced to create, store and manage processes
- Initial BusinessOptix outputs included illustrating current and future states; creating and publishing training material; capturing process risks; enabling process sharing, reviews and approvals; providing end-user activity reports and a central process library
- Outcome has been significant improvements in the way processes are designed, rolled out and managed. For example, processes are now documented, teams are able to easily capture and share process changes and teams collaborate
- Plans going forward include increasing collaboration, moving from team to customer experience view of processes and using metrics to support understanding of performance and decision making

## Aiming to transform a business

This well-known financial services organisation had an objective to transform their customer facing working practices from ad hoc and siloed to continuously improving.

The journey started with the creation of a continuous improvement team whose first task was to transform the claims handling process. Early on the team recognised that documenting their as-is and to-be processes and finding a simple way to roll these out was going to be an important part of the transition. At the time the business was using Visio and identified the need for a tool that would support the multiple dimensions (incl. modelling, comparisons, version control, etc.) of their work.

## Getting Going

With the introduction of BusinessOptix, the team were able to create a centralised space for creating, storing and managing their processes. From here they used workshops to map the existing process (as-is) and then moved onto updating and writing new processes (to-be). A key instrument in demonstrating the changes was the BusinessOptix transformation feature. This visually brought to life and illustrated the current and future state to stakeholders – for example, illustrating reductions in the number of steps.

When designing the processes, BusinessOptix was used to add descriptions to process steps, in context. The descriptions were then used for training (e.g. demonstrating working practices), providing work instructions and reference materials to front line employees. Master data was used to capture and view details of the teams and systems involved in each process – this enables the team to map and manage resources across processes. Additionally, forms have been used to help identify and capture process risks that were previously stored in an Excel FMEA (Failure Mode Effects Analysis) tool - this enabled the team to align risk management alongside the process that it relates to.

“BusinessOptix has enabled us to capture our process knowledge and create an environment where continuous improvement is ingrained in our work”  
Continuous Improvement Specialist

Once processes are created, reviews and approvals are managed via BusinessOptix. After the team creates a process it is sent to the subject matter expert (SME) for review and approval. As part of the approval process the SME is able to make comments against each step of the process. Once the final process is agreed, it is published and all relevant team members receive a notification that it has been updated and is ready for them to use.

Activity reports are used to help manage and track the rollout of new and updated processes – if someone hasn't looked at the latest versions, they can be given a polite nudge to do so.

As a final touch, all the processes and associated documentation are stored in a process library which can be accessed via a menu on the landing page. The menu is split into core functions and teams including claims, customer contacts, support and procurement.

## Realising Beneficial Outcomes

First and foremost, the teams have moved from not having any processes documented to having all of them documented and easily available.

Second, following the introduction of BusinessOptix, teams are now able to capture and reuse knowledge through the ability to easily access and update their documents in a central repository. In the past as processes were deliberately or organically adjusted, the change was not captured and shared. Whereas now changes are easy to capture and cascade across the immediate and wider teams (of course using the robust approvals process).

Third, it has removed silos, and teams are better integrated and can see how change in one area impacts other areas of the organisation.

## A Continuous Journey of Improvements

To date BusinessOptix has enabled the continuous improvements teams to make a stepped change in how the organisation works. And given its name, they continue to strive for further improvements such as increasing the level of collaboration, sharing and awareness of what teams are doing and the impact they have on each other up and downstream; moving from a team to customer experience focus that tracks the end to end processes and process improvements across all teams and functions, and making use of more of the metrics to support the numbers as well as the steps in process improvements.

## About BusinessOptix

BusinessOptix is a cloud-based business modelling and process design platform.

Recognised by Gartner for its ability to support organisations from strategy to execution, BusinessOptix is being used to deliver change & transformation and process improvement initiatives. Organisations using the platform span multiple industries including financial Services, retail, media, telecoms, pharmaceutical, government, consultancies, legal services and business process outsourcing. For more information, visit [www.businessoptix.com](http://www.businessoptix.com) or contact us on +44 207 084 7480

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