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Capital Request Processes Now **FLOW** as Smoothly as Water from a New Faucet



Tim Baker, Vice President of IT, Moen

by **Ken Murphy**, Features Editor

Moen Incorporated, an SAP customer since 1998, is the number one faucet brand in North America. Based in North Olmsted, Ohio, the global company manufactures and sells a full line of kitchen and bath products including sinks, showerheads, and a wide range of accessories. Innovation is a hallmark of the company — founder Al Moen invented the single-handle faucet in 1939 and earned more than 75 plumbing patents in his career — and new products are always being launched. From concept to market, that entails numerous capital requests that must first be submitted for approval and eventually recorded into Moen's SAP ERP transactional system of record.

As Moen's SAP landscape matured — it runs a single, global SAP ERP instance for nearly every line of business, including supply chain, sales, service, and manufacturing — its paper-based capital expense request (CER) process was quickly becoming an outlier from the company's increasingly streamlined and automated business processes.

The former process to initiate a capital expense request at Moen required a user submitting a paper-based form that would then follow a global manual routing process through the corporate office, from inbox to inbox, for the proper supporting documentation and approvals — the exact route differing based on a number of factors such as department of origin, type and amount requested, and level of approval needed. This paper-based process created inefficiency and uncertainty. Of the roughly 300 employees who were involved in the CER process, few outside of finance had a firm grasp of a request's intended journey. Additionally, manual routing meant that a request could be stalled or misplaced, which would leave those on the approval chain completely unaware of the request. Exacerbating this lack of traceability and visibility was the fact that CERs originating in Moen's manufacturing facility in China had to be mailed to the corporate office, which added a layer of uncertainty to the process; for these requests, the recipient could not simply walk down the hallway to ask the sender a question.



Photos by Jeff Ellis Photography

At a Glance

Goal: Automate a manual routing, paper-based capital expense request process with a workflow application that integrates with SAP ERP and Microsoft SharePoint

Strategy: Implemented Winshuttle's workflow solutions and went live in April 2014

Outcome: Created a transparent chain of approval system for all expenditure requests, and identified several other manual business processes to merge onto the Winshuttle platform

"We were looking for an enterprise-level toolset that could automate business form development and routing in a simple and fast way and would integrate with our SAP system," says Tim Baker, Vice President of IT at Moen. "The tool needed to be intuitive to the business and ultimately remove the custom IT development that was relied on in the past."

Gina Carlson, Moen's Director of Asia Pacific Customer Relationship and Financial Systems, plays a cross-functional role where she serves the interests of both the business and IT. As a regular user of the CER form, submitting and approving, she knows first-hand the frustrations and stress the manual, paper-based process placed on users. "As the CER gatekeepers, finance would know if required approvals were lacking, but getting there involved a lot of guesswork from people who weren't sure exactly where the form needed to go. So there was a clear need for improvement," says Carlson. "We wanted the capability to understand exactly where in the routing process a request is sitting."

Design Requirements

Carlson and Baker spearheaded the initiative to automate the CER process, keeping several requirements in mind. Off-the-shelf automated routing of business processes and master data management was one imperative, but a lot of end-to-end workflow tools meet that standard. For Moen, it was essential that the application it selected not only seamlessly integrate with SAP ERP, but also support its longstanding practice of yearly SAP upgrades. Ease of use was another requirement, with a goal of enabling process workflows without IT assistance, essentially putting business users in charge of automating select processes and relying on IT for needed approvals and the bare minimum of support.

Another consideration was that the tool must integrate with Microsoft SharePoint, which Moen was implementing in parallel to support other internal processes. Finally, Carlson and Baker did not want to limit the workflow tool to CERs; instead, they conducted a thorough business value assessment (BVA) inclusive of SharePoint and a more thorough process lifecycle analysis with an implementation partner, Clear Process Solutions, to determine whether other SAP transactions might benefit from similar automation.

Says Carlson, "The ability to leverage a tool to scale across the enterprise was a major consideration, because, while we looked at enabling this for finance, we identified other initiatives that could benefit from the toolset as well."

The BVA process resulted in a prioritized series of process innovations that the company plans to tackle sequentially over the next 12-18 months. The expectations are to



accelerate rollout as the business and IT teams become conversant with the solution set and start to take advantage of best practices around SAP workflow innovations.

Working with Clear Process Solutions, Moen decided to purchase and implement Winshuttle's workflow solutions. "The combination of Winshuttle and SharePoint provided a workflow platform that is fast to deploy and easy to use — all while integrating with our SAP system," says Baker. "Clear Process Solutions enabled the CER process rapidly and provided outstanding support through the project deployment."

"Our nirvana was to automate the CER process from initiation of a request all the way to updating SAP ERP in order to increase our process efficiencies and associate productivity. The IT organization is striving to provide technology solutions and platforms that enable fast and intuitive process optimization," Carlson says. "Winshuttle was a perfect fit in every way; every piece of the project we were trying to solve had a direct correlation and process fit with the toolset. The main business value was the ability to provide complete visibility into exactly where a request is sitting in the routing process, and we now have that capability. Knowing we were already installing Microsoft SharePoint and that we could just piggyback on that project made it make all the more sense." (More information about the Winshuttle solutions Moen implemented is available in the sidebar at the end of this article.)

Company Snapshot

Moen, Inc.

Headquarters: North Olmsted, Ohio

Industry: Kitchen and bath product manufacturing

Company details:

- Founded by Al Moen, who invented the single-handle faucet in 1939 after burning himself on a traditional two-handle faucet (upon his retirement in 1982, Al Moen had earned more than 75 plumbing patents)
- Has three manufacturing facilities in the US and one in China — two distribution facilities in the US; one in China; and one in Canada and Mexico
- Parent company is Fortune Brands, Inc. (NYSE: FBHS), which includes brands such as Moen faucets, Master Lock security products, Masterbrand Cabinets, Therma-Tru entry door systems, and Simonton Windows
- New hires in Moen's consumer service department undergo 500 hours of classroom instruction to learn about the company's products and policies

SAP solutions:

- SAP CRM
- SAP ERP
- SAP BW
- SAP Enterprise Portal
- SAP Advanced Planning and Optimization
- SAP PLM
- SAP Mobile Platform
- SAP BusinessObjects BI solutions
- SAP solutions for GRC

Automate SAP Processes with Winshuttle Across the Enterprise

Winshuttle makes it easier to automate and standardize common SAP operations, helping companies maximize the return on their SAP investment. Winshuttle software enables customers to build and adapt Microsoft Excel and SharePoint-based interactive forms and workflows for SAP software without custom coding, allowing SAP users to rapidly create solutions that improve data quality while accelerating transaction processing.

Winshuttle helps customers reduce costs and maximize opportunities by offering core capabilities that lower the barrier for SAP optimization, including:

1. Full SAP integration and easy development of end-to-end processes
2. Intuitive web application for building both forms and workflows
3. Centralized tools for management and governance

These capabilities are building blocks for creating solutions that give business users easy-to-use tools for automating complex business processes, while providing IT professionals with governance controls that ensure SAP integrity and minimize administration.

Founded in 2003, Winshuttle software is implemented at nearly 2,000 companies in almost 70 countries. Find out how Winshuttle can make you a hero who transforms the way your company works: www.winshuttle.com/about/winshuttle-company-profile.

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Easy to Learn, Easy to Use

The implementation itself was not that much more complicated. It simply involved some training classes on how to build a workflow with Winshuttle, tailored to Moen processes. Because business users were uniform in their desire for a new workflow tool, it didn't take much to convince them that the application would make their jobs easier. To allay any issues with change management, however, Carlson initiated a formal communication plan that included additional training documents, webinars, and IT town halls to help ensure solidarity and user buy-in.

"We were methodical about change management and creating awareness of the product, and how we could leverage it with SAP ERP," Carlson says. "This entailed staging communication across the organization so that everyone understood how they might best use the application and what it might mean for their particular processes."

One of the reasons the CER process was selected as the first test case was that it was a process nearly every department in the organization was familiar with first-hand. Moen purchased Winshuttle's workflow solutions in November 2013 and went live with the CER process on the new platform five months later.

Keeping Innovation Flow Running

Benefits in time and effort saved were made clear as soon as the first capital expense request on Winshuttle went through the approval process. Before automation, the CER process would take anywhere from four to 10 business days, depending on the number of approvers. Now, even complex and high-profile CERs can be through the process in one or two business days. And from a program administration standpoint, Moen now has complete visibility into the CER process. Says Carlson, "I know at any given time where my funding request is; I can literally go in and check who has it, who has seen it, and who has approved it or needs to approve it. I can even go and look at requests I've submitted in the past, which is something I could never do before."

Within the first month, almost 70 people at Moen already used the new process. With an average anticipated time savings of two hours in each person's participation, project payback is expected in less than three months.

This project qualified how rapidly Moen could not only automate a process with SAP integration, but also began qualifying resource requirements to automate existing processes. Winshuttle is a fitting solution for these processes because they all require automating the form, routing the form, and updating SAP ERP. This change will simplify the user interface and process that exists today. The days of tracking down paper-based forms, Carlson says, are quickly coming to an end at Moen.

"SAP software runs our business, and it's not going away, so this project was about implementing a toolset that enables our front-end business processes, which is ultimately part of SAP ERP," Carlson says. "We now have the toolset we needed to help us manage our data and business process workflows with an intuitive, easy-to-use front end, while at the same time updating our transactional system of record." ■