



Whitepaper

Navigating Through the Process Excellence Journey with Intelligent Automation

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Executive Summary

The pandemic pushed businesses to rapidly adopt digital transformation initiatives. With a majority of their workforce becoming remote, clients were faced with a situation where they had to settle upon the best tools and technologies to maximize their system investments. Most leaders turned to automation as a solution, and what they were really looking for is intelligent automation that meets and delivers their process excellence goals adequately and consistently.

Injecting Intelligence into Process Excellence

In their quest for the most optimum digital transformation, businesses often must choose the best tools & methodologies in their toolkit like Lean, BPA, Process Mining, and Process Excellence. As businesses move toward application modernization, there is a natural tendency to automate as many manual tasks as possible under the auspices of intelligent automation.

But CTOs, CXOs, and business leaders of automation initiatives must carefully analyze which applications

can be automated without disrupting current business operations. Further, they must work closely with employees, convincing them to learn new skills, deal with productivity and efficiency issues, perform complex ROI and cost calculations, and more. A recent survey found that about 75% of internal business functions are competing against each other instead of collaborating on digitization. With many constraints, leaders need all the help they can to tide over challenges and succeed in their initiatives.

The Helping Hand of Intelligent Automation

Intelligent automation helps companies move faster. Most projects are executed only after the teams have identified and defined the processes to be automated. Low-code application platforms (LCAP) like Appian, OutSystems, Unqork, etc. can be used to automate processes because they have business process management hooks and workflow processes built-in.

Robotic Process Automation (RPA) tools like UiPath, Automation Anywhere, Blue Prism, etc. may also be used to automate mundane, repetitive, and

manual tasks. The main goal is to get rid of manual, error-prone tasks so that the productivity and cost savings goals can be met. Hyperautomation is when BPM, RPA, AI / ML, and process excellence all work together to give the business users and stakeholders the best version of how they want process automation to work. Many companies are also leveraging process mining to identify process improvement opportunities in existing processes and funnel those opportunities into RPA and / or LCNC automation projects.

How are the tools interconnected?

- \ **Lean and 6-Sigma** are tools and **techniques** that companies use heavily to solve problems in a structured and effective way by following a set process.
- \ **Digital Process Automation (DPA)** aligns the people, process & technology in an organization and **automates tasks** to increase the effectiveness of a process exponentially.
- \ **Process Mining** is when companies use software to get information from enterprise systems like

To summarize, once processes are automated, continuous monitoring and optimization enables getting the maximum benefits from automation. They can be further tweaked by applying the

Oracle, SAP, etc. to get detailed, data-driven information about **process performance** from their event logs. This is often used once processes are automated across different systems.

- \ **Process Excellence**, on the other hand, is a way to **improve** how businesses use their internal processes to create and deliver value to their customers.

principles of process excellence to get the most out of them through automation technologies in BPM, RPA, and / or AI / ML.

Critical Factors to Consider

At the start of the process excellence journey, the following are a few things to keep in mind to make sure process transformation projects are successful:

- \ **Don't bite off more than what you can chew:** Split the large initiatives into manageable chunks that you can handle and look at the potential return on investment (ROI) of process improvements in a small, focused area. Use tangible methods to choose processes that maximize ROI with minimum risk of failure. At the same time, ensure visibility of the work across the organization.
- \ **Set clear goals & KPIs:** Set up goals that the organization can work toward (cost savings, productivity improvements, completing required compliance, etc.). Always refer the project results back to these goals.
- \ **People are crucial to success:** Communicate the goals and make sure to check in with the contributors, stakeholders, and team members who will be affected. Importantly, keep it simple!
- Leverage supporters to get visibility across the organization. The more visible the process is in the organization, the more likely it is to get more resources and support.
- \ **Single source of truth for the program:** Provide a single platform for information sharing on progress, cadence, and goal metrics.
- \ **Avoid pitfalls:** Ensure that you are as unbiased as possible in making decisions on the functional areas and processes identified for improvements. Many process excellence initiatives get bogged down due to internal functional group issues where teams lose focus due to short-term gains. Holding teams accountable for setting and meeting clear KPIs within a constrained timeframe enables them to fall in line with the uber goal.

Stages of a Successful Process Excellence Operation

Once process excellence opportunities are identified, they must be operationalized through the discovery process. Discovery is made up of initiation, requirements gathering, future stage planning,

tool, and finalization stages. This would also entail setting the program charter, tool finalization, and development prioritization. **(Figure 1)**



Fig 1: An indicative sample of the Stages of the Discovery Process

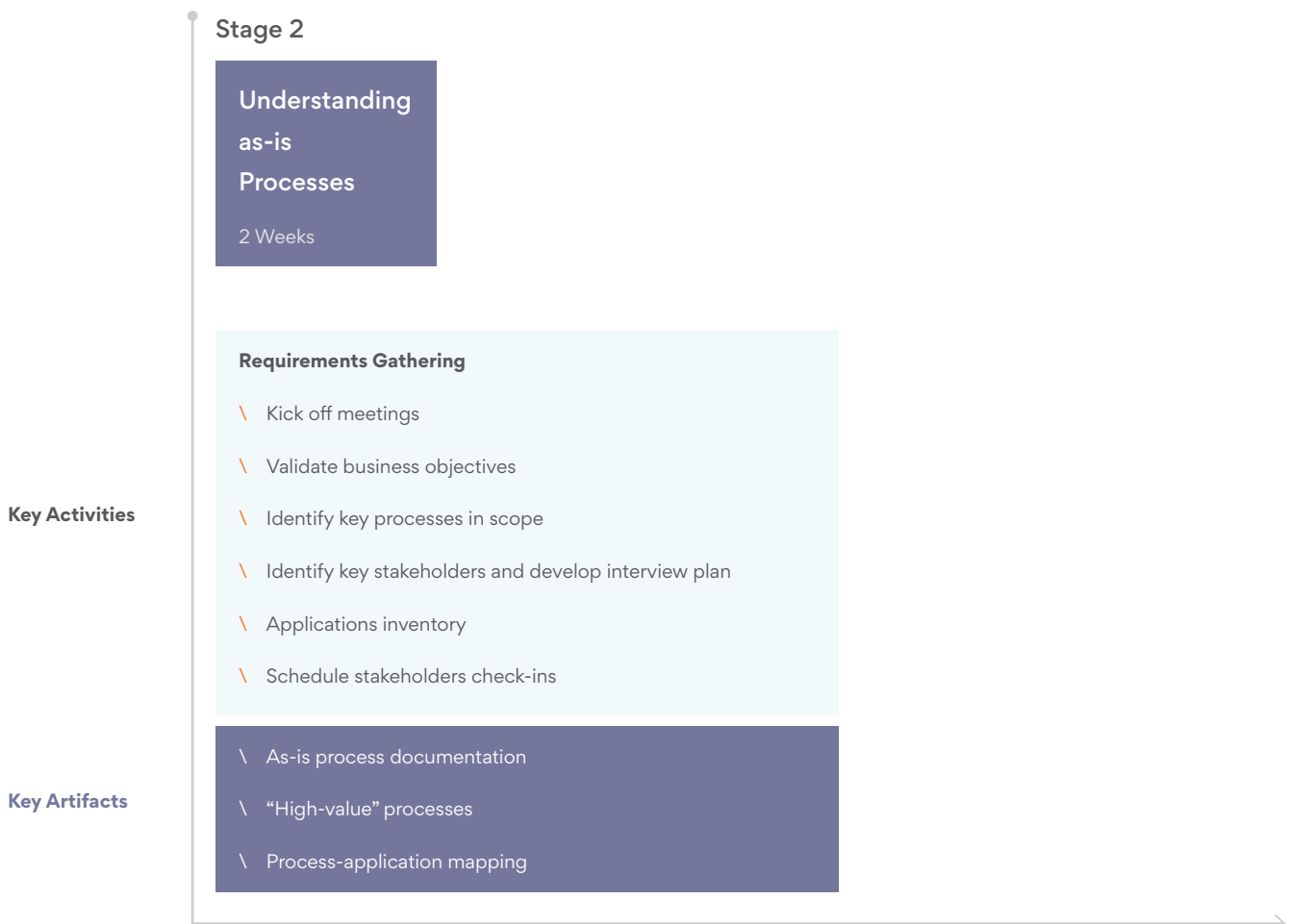
Stage 1: Initiation and Planning (Engagement Initiation)



The various steps in this stage are as follows:

- \ **Kick-off meeting:** The journey's first step. Schedule a session to meet and greet the stakeholders, explain the program, and talk about the big picture goals and possible outcomes.
- \ **Validating business objectives:** Set the main goals, define KPI framework, define SLAs, and set goals for this program, as it is vital for most business teams.
- \ **Identify key processes:** Together with the experts in the room, list the most important processes that will need to be reviewed and changed as part of this project or program, inclusive of setting the input / output criteria for the processes.
- \ **Identify key stakeholders:** Identify the key champions, affected teams, and leaders (they will need to be updated often on the changes) as well as the detractors (they will need to be persuaded by the champions).
- \ **Applications inventory:** Create a draft view of the system landscape that makes up the current process.
- \ **Schedule stakeholder check-ins:** Set up a schedule of ongoing updates and check-ins.

Stage 2: Understanding the 'As-Is' process (Requirements Gathering)



- \ **Understand the 'As-Is':** Inventory the current processes as they are implemented (As-Is)
- \ **Categorize Processes:** Identify high-frequency and high-cost processes and sub-processes, and determine the gaps and bottlenecks to be fixed in the 'To-Be' processes
- \ **Map Systems:** Map and document the processes to the individual systems and applications
- \ **Prioritization:**
 - Identify processes which would be ideal candidates for transformation using quantifiable assessment methodologies.
 - The Opportunity Assessment Framework (**Figure 2**) is a useful scale to evaluate and identify the right set of processes to focus on based on the combination of technical complexity (IT) and urgency / priority for the business. This allows different teams to talk about the data and agree on what should be the top priority.

ID	Use Case	Description	A: Technical Feasibility	B: Business Priority/Urgency	Final Score	Rank
#		Succinct description of the use case	Technical complexity (1-Low, 5-High)	Importance to business users (1-Low, 5-High)	(A+B)/2	
1	Use Case 1	Description 1	5	2	3.5	1
2	Use Case 2	Description 2	3	2	2.5	3
3	Use Case 3	Description 3	2	4	3	2

Fig 2: Opportunity Assessment Framework

- Once a group of processes is identified for improvement, further prioritize them using the weighted shortest-job first (WSJF) scoring process. (**Figure 3**)

ID	Use Case	Description	Duration (Job Size)	Cost of Delay	WSJF	Rank
1	Use Case 1	Description 1	1	5	5	1
2	Use Case 2	Description 2	6	3	0.5	4
3	Use Case 3	Description 3	4	4	1	3
4	Use Case 4	Description 4	3	6	2	2

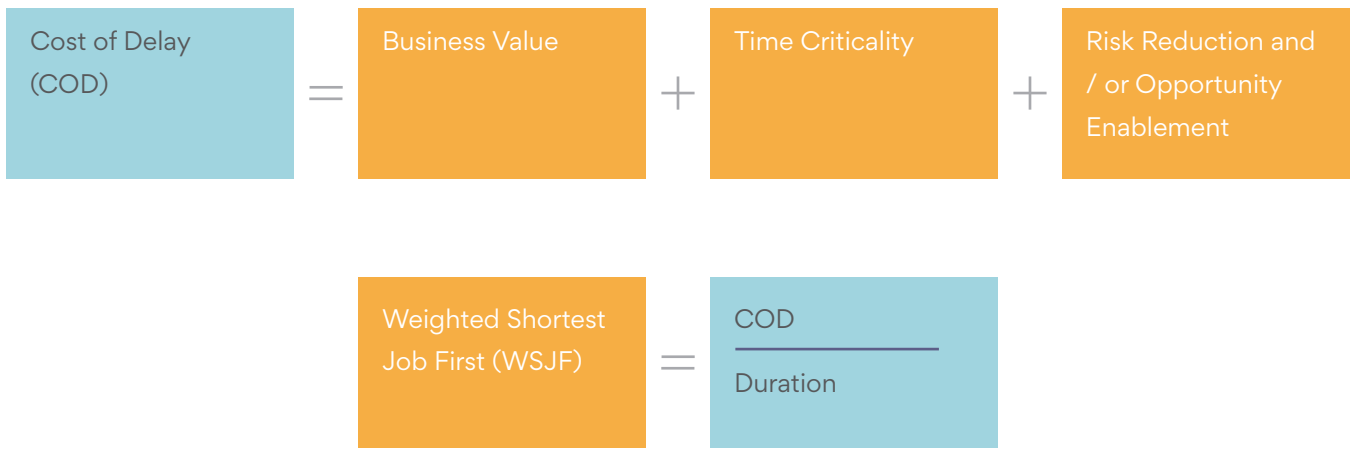
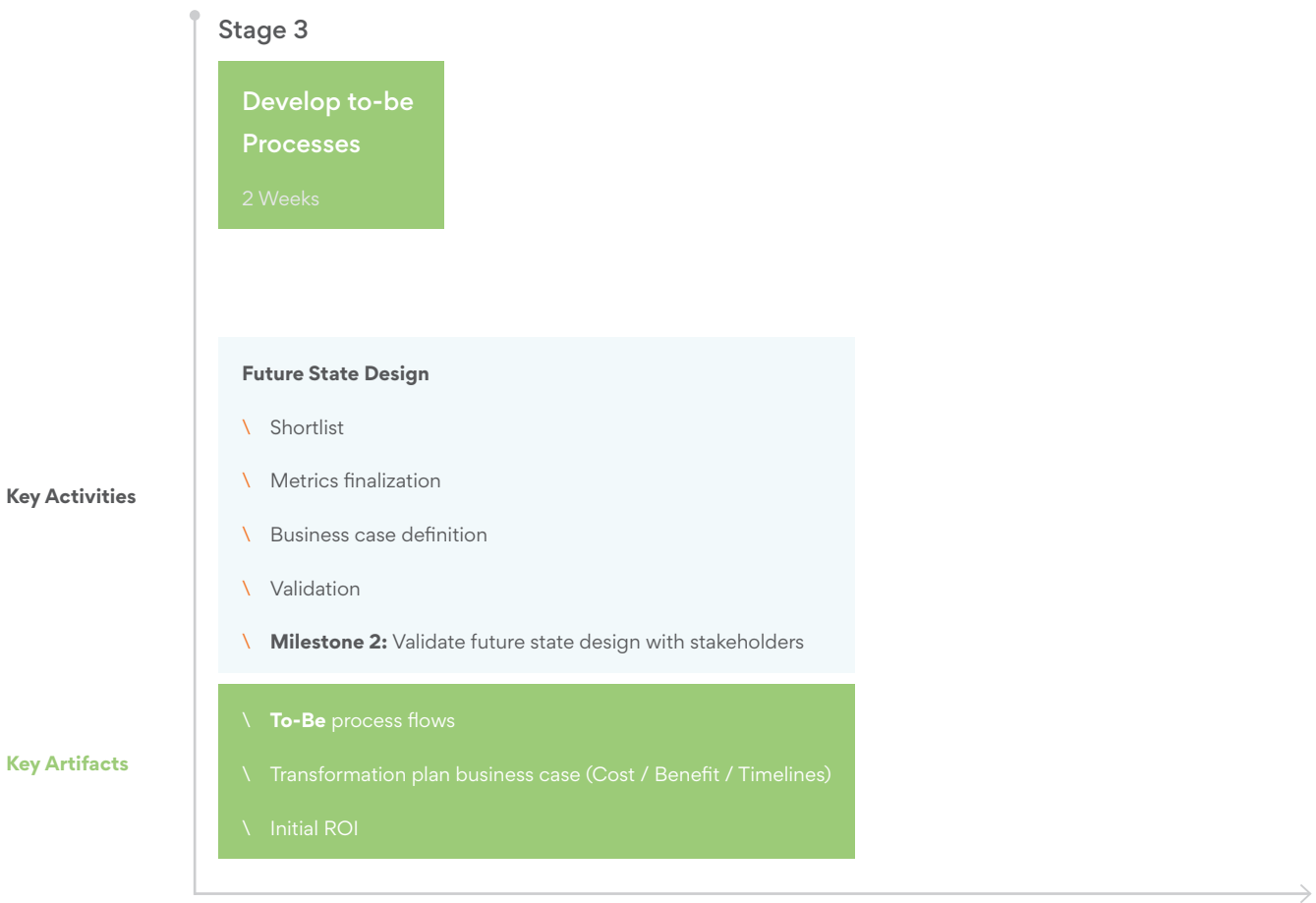


Fig 3: Opportunity Prioritization Scorecard

Stage 3: Develop To-Be Processes (Future State Design)

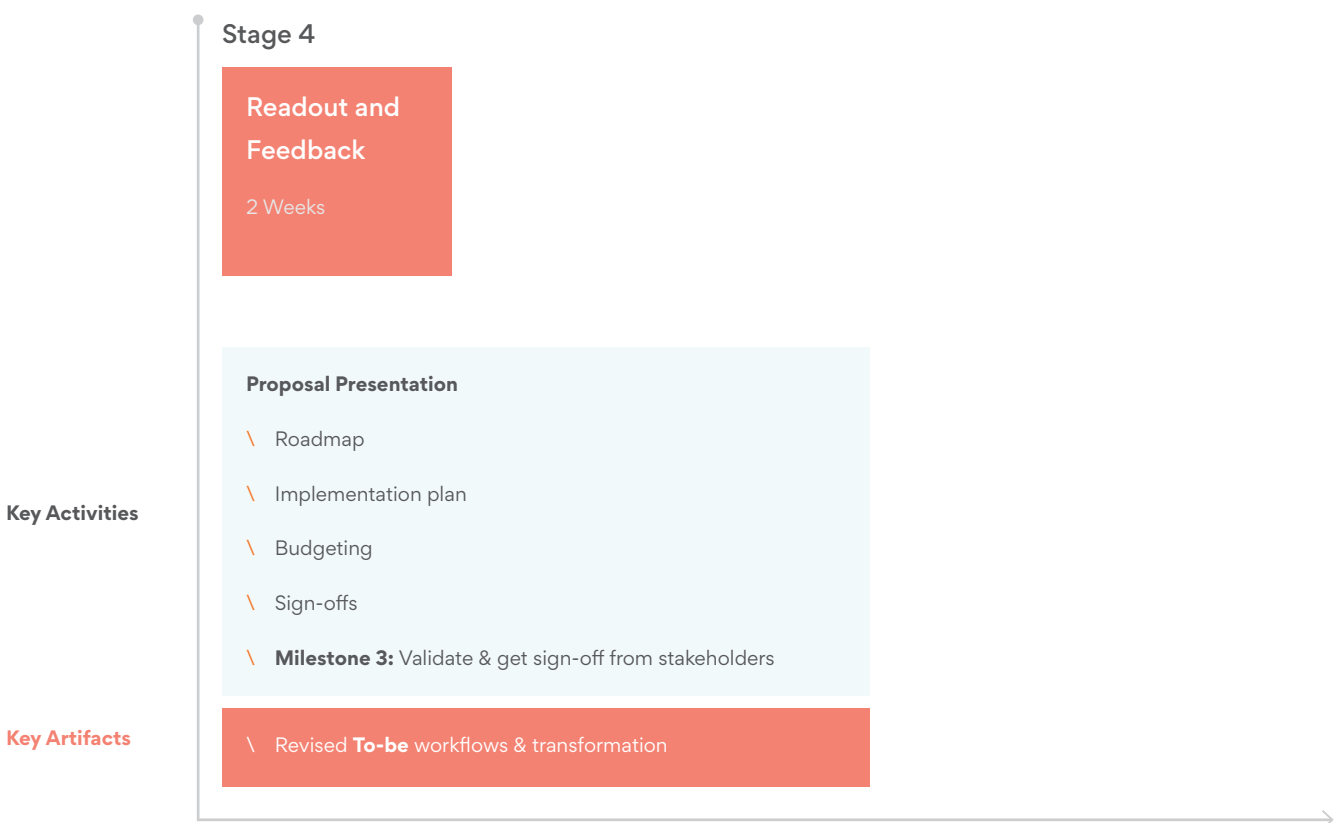


- \ **Shortlist:** Once the priorities have been set, the next step is to find (and get agreement on) the short-list candidates, which are the top 25% of processes that need to be worked on through an agile design and development project. The remaining 75% would go into the backlog to be considered for the next sprint cycle.
- \ **Finalize Metrics:** Document the current metrics used for the processes, define the critical success

criteria for the **To-Be** state and create the new KPIs for tracking ROI.

- \ **Define the business case:** Develop the business case and **To-Be** functional requirements for the selected process (es).
- \ **Validation:** Present the short-list, **As-Is** and **To-Be** details to the core team and get the approvals from the stakeholders.

Stage 4: Finalization (Proposal Presentation)

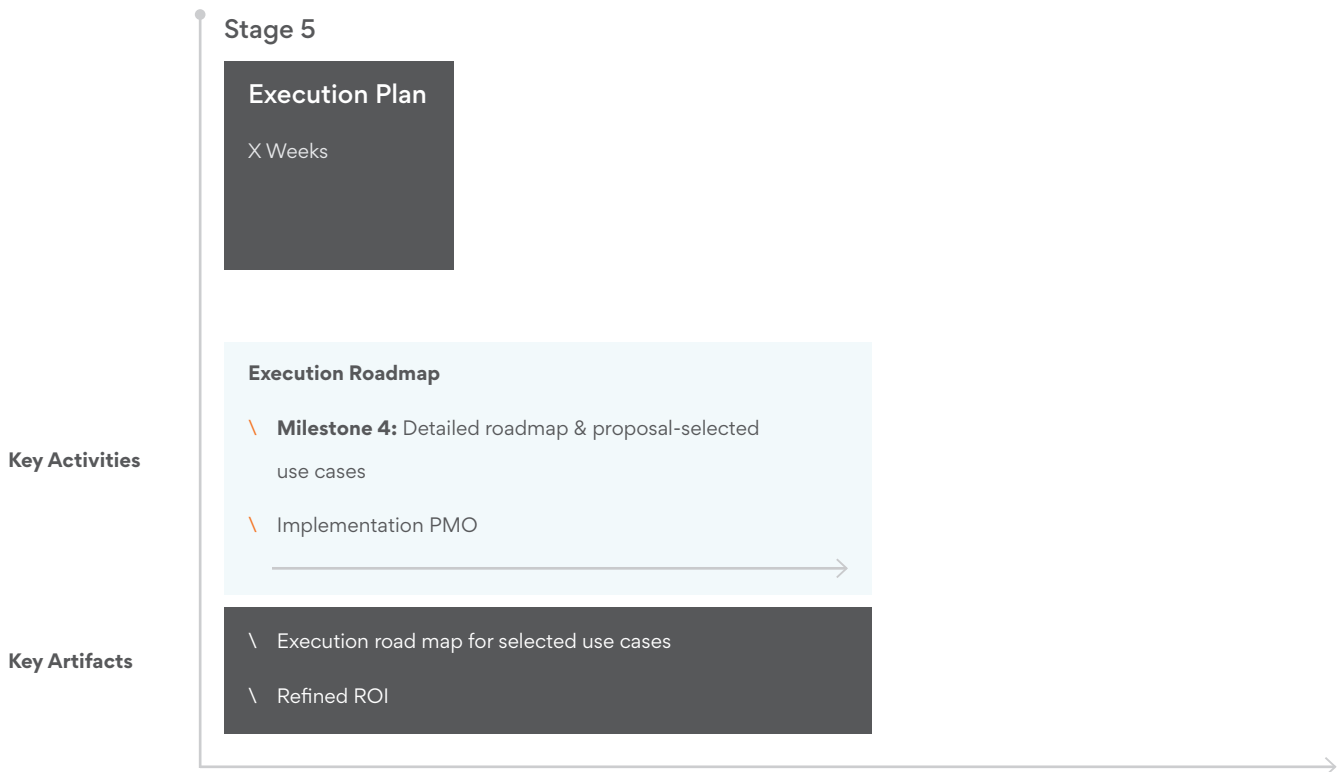


- \ **Roadmap:** Make a high-level plan for the program that gives project teams and stakeholders an overview of the digital transformation journey.
- \ **Implementation plan:** The next logical step is to break up the high-level roadmap into smaller pieces of detailed deployment plans that include timeframes for development, testing, and roll-out.
- \ **Budgeting:** Create a high-level overview of the cost

for the program which drives the overall roadmap and allows teams to optimize deployments as per the affordability.

- \ **Signoffs:** Call a final sign-off meeting with the stakeholders (also called the operating or steering committee) to ensure that the approvals, open issues, and signoffs are documented and agreed upon before commencing the transformation project.

Stage 5: Project Execution Plan



- \ The fifth and final stage starts once the formal agreement and sign-offs are received from the stakeholders and management team.
- \ **Implementation PMO:** The main product owners, program managers, and delivery leads from both the business and IT teams would be on this project management team. They will be held accountable for coming up with a detailed roadmap and deployment schedule for the use cases that were chosen.

- \ **Project kick-off milestone:** Typically, there is a project kick-off meeting where the results of the last stage are reviewed and the resources, budget, and schedule are tweaked. Depending on how complicated the Process Excellence focus areas are, the final project can take anywhere from a few weeks to a few years.

Conclusion: The Transition from Process Mining to Process Excellence

Process mining is useful when it helps teams break through bottlenecks and improve a process. Process teams often look at processes in a functional silo and try to improve how they flow in that realm. But most problems are caused by cross-functional data flow and transactions between functional silos, which are the main reasons why the end-to-end process does not work as well as it should.

The magic of process mining is that once you pick a metric that is important for a process using event logs and AI, the system will also show what changes affect the process. These, in turn, lead to the key

areas where the principles of process excellence could be used to maximize the improvements and evaluate the end results once they have been put into place and measured. Process excellence, on the other hand, expands on the learning from the analysis of the process mining exercise and measures the results of implementing the process/tool changes and enhancements required. Successful enterprises have set up the capability to enable teams to operationalize continuous monitoring and improvements. Most importantly, they measure the results and ROI in order to strengthen the positive impact of their process excellence initiatives.

References

- \ [The changing landscape of process excellence](#)
- \ [5 Process Mining articles for Process Excellence leaders](#)
- \ [Survey of Cross functional Collaboration \(Accenture\)](#)

Kickstart your process excellence journey with us today.

[Learn more](#)

About Persistent

We are a trusted Digital Engineering and Enterprise Modernization partner, combining deep technical expertise and industry experience to help our clients anticipate what's next. Our offerings and proven solutions create a unique competitive advantage for our clients by giving them the power to see beyond and rise above. We work with many industry-leading organizations world-wide including 14 of the 30 most innovative US companies, 80% of the largest banks in the US and India, and numerous innovators across the healthcare ecosystem. Our company fosters a values-driven and people-centric work environment. Our strength of over 22,500+ employees is spread over 18 different countries across the globe.

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