



DIGITAL TRANSFORMATION SERIES

Processes

Agenda

5 Minutes	Part One: Course Overview
20 minutes	Part Two: Process Mapping and Analysis
20 minutes	Part Three: Process Automation
10 Minutes	Part Four: Lean Methodology
5 Minutes	Workshop Wrap-Up

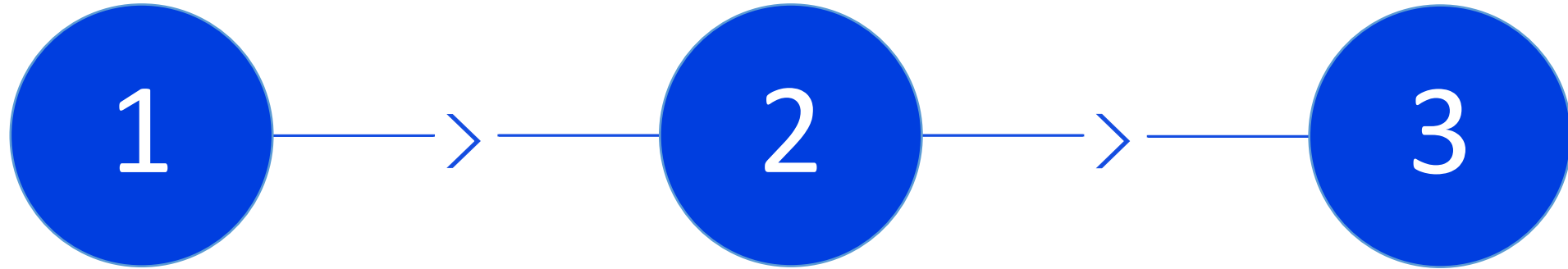
Part One: Course Overview

This course will examine business processes and the benefits of mapping them out, take a look at why automating steps of a process could be helpful, and explore the basic ideas of Lean and how it relates to digital transformation.



Part One: Course Overview

Learning Objectives



Map out a business process and understand why this could be helpful

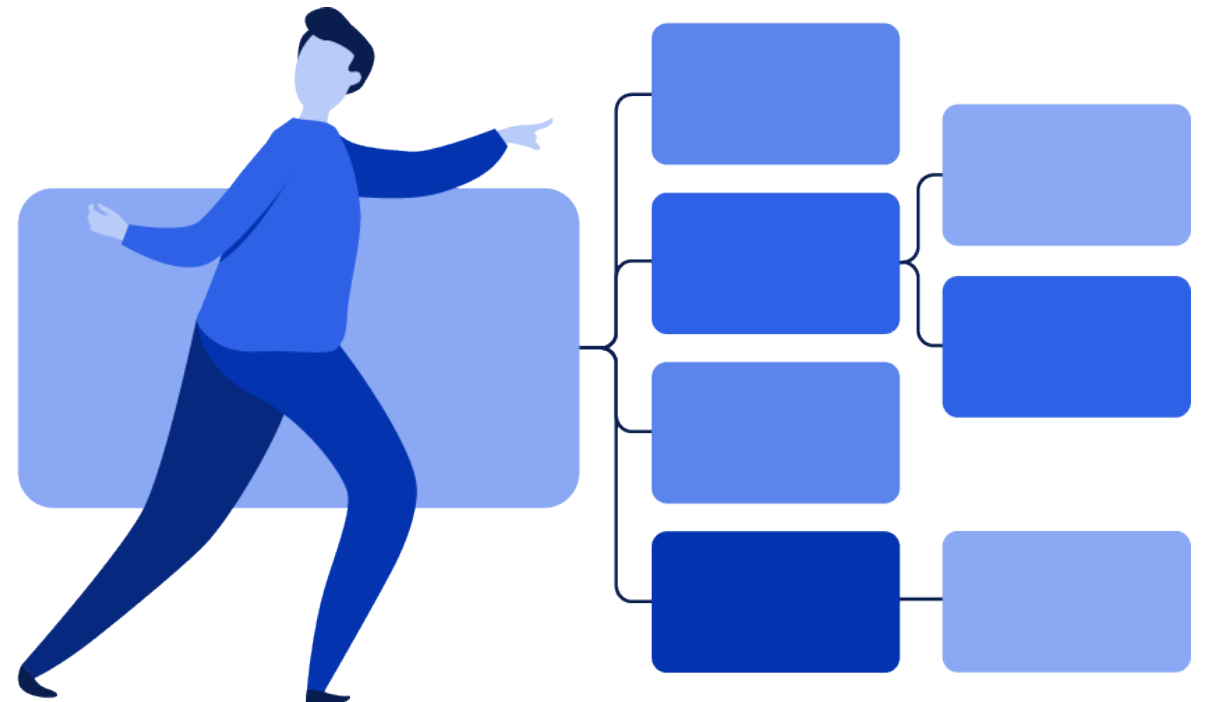
Determine when automation could improve a business process

Understand the basics of the Lean methodology and how it could be applied to digital transformation

Part Two:

Process Mapping and Analysis

This session will look at how to map out a business process, and why mapping is beneficial.

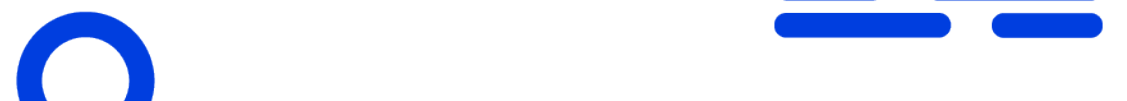


Part Two: Process Mapping and Analysis

Identifying Existing Business Processes and Workflows

What is a business process?

What is process mapping?

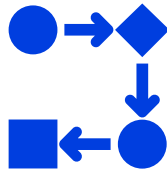


Part Two: Process Mapping and Analysis

Steps for Creating a Process Map



Gather and assemble the information about the process.



Put the steps in the order in which they occur.



Draw the map in a digital form, using shapes as symbols. Inside the shapes, describe that step of the process.



Review the map. Make sure it matches what was originally described in steps one and two.

Part Two: Process Mapping and Analysis

Benefits of Process Mapping



In-depth understanding



Identifying problems



Identify how to implement the process



Eliminate redundancies and waste



Process achieving outcome

Part Two: Process Mapping and Analysis

Symbols and Their Meanings

- Here are some of the basic process mapping symbols and their meanings.
- These symbols can be changed to suit specific needs.
- Or, all of the symbols can be the same shape and use color coding to symbolise different aspects of the process.
- Always include a legend so anyone viewing the map can understand its contents.



Indicates Step
in Process



Indicates a
Decision to
be Made



Indicates Start/
End of Process



Indicates a
Document
that needs
to be Used



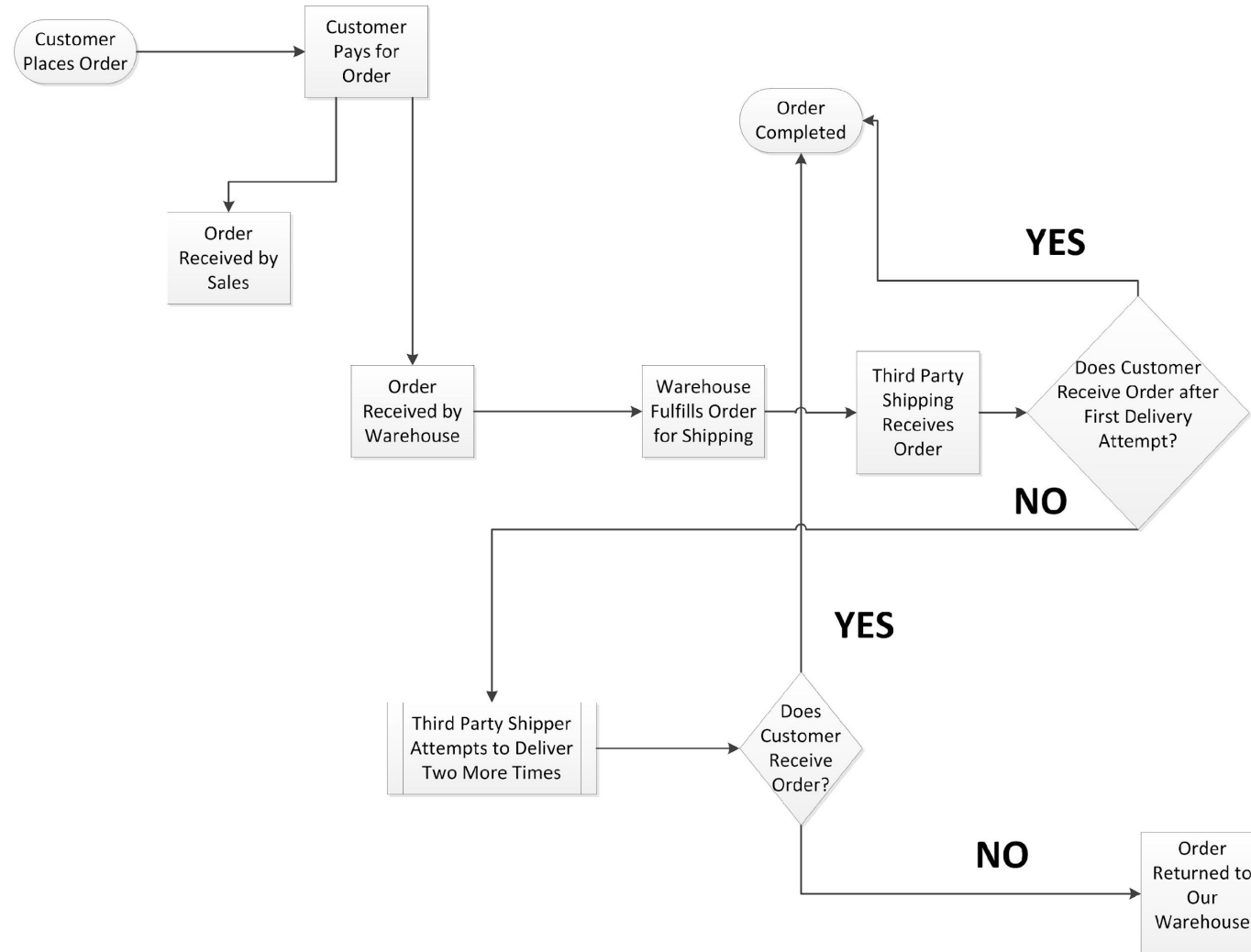
Indicates a Sub
Process



Indicates the
Direction or
Flow of
Process

Part Two: Process Mapping and Analysis

Symbols and Their Meanings



Part Two: Process Mapping and Analysis

Identifying Areas for Improvements



It is important to define improvements in order to imagine the ideal state for a process.



Defining improvements builds accountability.



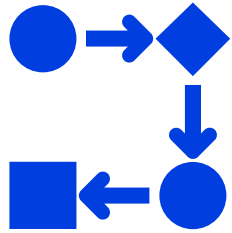
Highlighting problem areas and developing a clear, concise plan to address these problems helps to define roles and how the process should be carried out to achieve the desired outcome.



This makes people responsible for and accountable for making the process work.

Part Two: Process Mapping and Analysis

Identifying Areas for Improvements



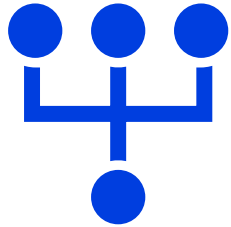
To be able to measure the success of the implemented process, it is necessary to define the improvements that are desired.

This involves having a clear idea of what improvements will be made and how they will benefit the business.

This is also important for justifying why the process needs to be enhanced or created.

Part Two: Process Mapping and Analysis

Identifying Areas for Improvements



Implementing a process within an organisation is not done in isolation.



A change in the way business is conducted affects everyone (employees, customers, and management) and can therefore cost a significant amount of time and money.



It is necessary to prove that the process will recoup that investment and continue to generate savings.

Part Two: Process Mapping and Analysis

Process Map

Choose a process within your organisation and map it out.

- What are the steps involved in your process?
- What events will be your start and end points?
- What symbols or colors will you use to map out the different elements involved in your process?

Part Three:

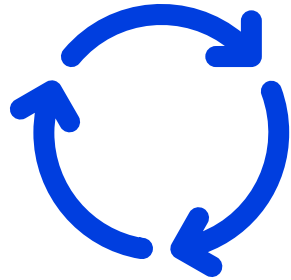
Process Automation

This session will examine how to determine when automation could be helpful in a process, the potential benefits and pitfalls, and how to implement automation.

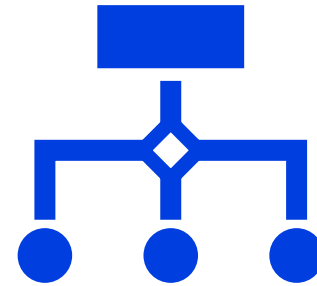


Part Three: Process Automation

Identifying Processes Suitable for Automation



When a process is automated, the goal is to use technology to help make the process more efficient.



Certain steps of the process or the entire process can be automated.

Part Three: Process Automation

Identifying Processes Suitable for Automation

When only steps of a process are automated, this allows for the blend of human interaction and automation.

- If this method is chosen, it is necessary to ensure that the people working with the automation understand how to use the technology and tools.

When the entire process is automated, this cuts down on the level of human involvement in the process.

- If this method is chosen, it is necessary to ensure that the process lends itself well to a small amount of human involvement.

Part Three: Process Automation

Benefits of Automation

Increased
profitability

Increased
productivity

Increased
efficiency

Increased
quality

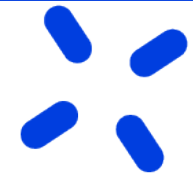
More
convenient

Part Three: Process Automation

Potential Pitfalls of Automation

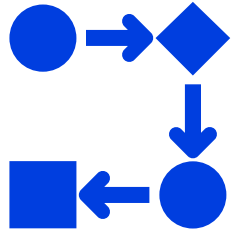
Compromised customer service

Not foolproof



Part Three: Process Automation

Steps to Automate a Process



Identify steps in the process that lend themselves to automation.



Look for increased quality and efficiency through automation.



Consult with an expert.

Part Three: Process Automation

Summary

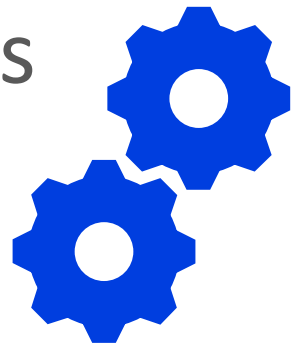
When automating aspects of processes or whole processes, there can be benefits and potential drawbacks. Here are some questions to use to help determine whether or not to automate a process:

- Does this automation optimise my process?
- Does this automation simplify my process?
- Does this automation create value for customers, thereby improving our bottom line?

Implementing Process Automation Tools and Technologies

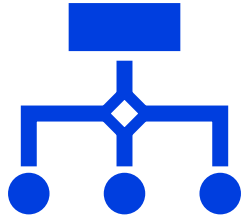
Workflow Engine

- A workflow engine is a tool that automates parts of processes or entire processes.
- Workflow engines normally work in conjunction with human interaction.
- However, workflow engines can complete processes without any human interaction,

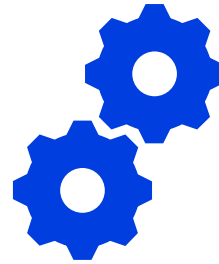


Part Three: Process Automation

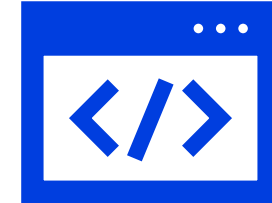
Implementing Process Automation Tools and Technologies



The parameters for the workflow engine are established by business rules that define what the system will allow.



These rules are designed to structure the activities that the workflow engine will perform.



Additionally, they are designed to guide the user to input the proper information to successfully complete the process.

Part Three: Process Automation

Implementing Process Automation Tools and Technologies

When creating business rules in a workflow engine, first establish what the system will do.

- How will it operate within the process?
- What will be its function?

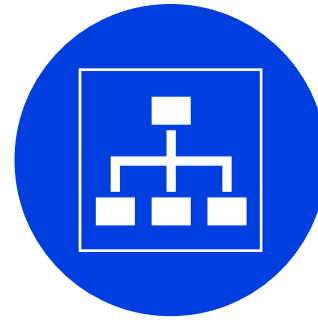
Based on these answers, begin to construct a set of business rules that will govern the operation of the engine.

Part Three: Process Automation

Implementing Process Automation Tools and Technologies



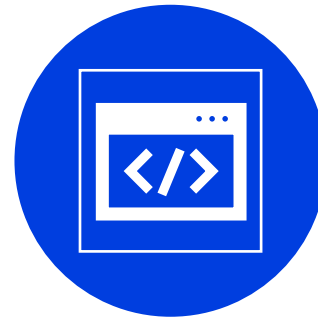
Without business rules, a workflow engine is directionless.



Typically, most organisations use logic-based software to create business rules.



When choosing business rule software, do research.



Make sure the software enables the potential of the workflow engine to be maximised.

Implementing Process Automation Tools and Technologies

When researching available engines, make sure the proper infrastructure is available to support it. Ask:

- What upgrades will need to be made to your existing IT infrastructure?
- What training will people need?
- Who in your organisation will be in charge of monitoring the engine?
- What funds do you have available to support the purchase and related expenses?

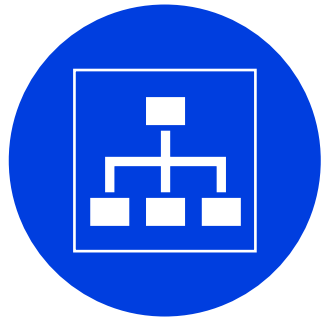
Implementing Process Automation Tools and Technologies

Once a workflow engine has been chosen, tailor it to the process. Consider:

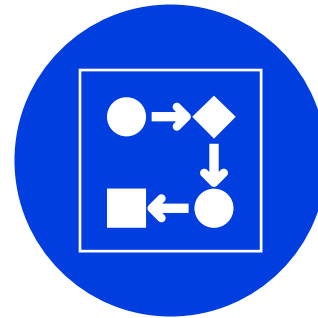
- What functions does it need to perform?
- What parameters need to be met in order to complete a process?
- What other systems need to be integrated?

Part Three: Process Automation

Implementing Process Automation Tools and Technologies



After tailoring the workflow engine, pilot the engine to ensure it is working correctly.



Identify improvements to be made and implement them.



Once the pilot has been carried out, make a plan for implementation.



Ensure that training is provided and that people within the organisation know how to use the engine to increase process efficiency.

Part Three: Process Automation

Workflow Engines to Revolutionise Industries

- Automated airport travel (ticket purchasing, getting your boarding pass, seat selection, and baggage check-in)
- The self-serve checkouts at grocery and department stores

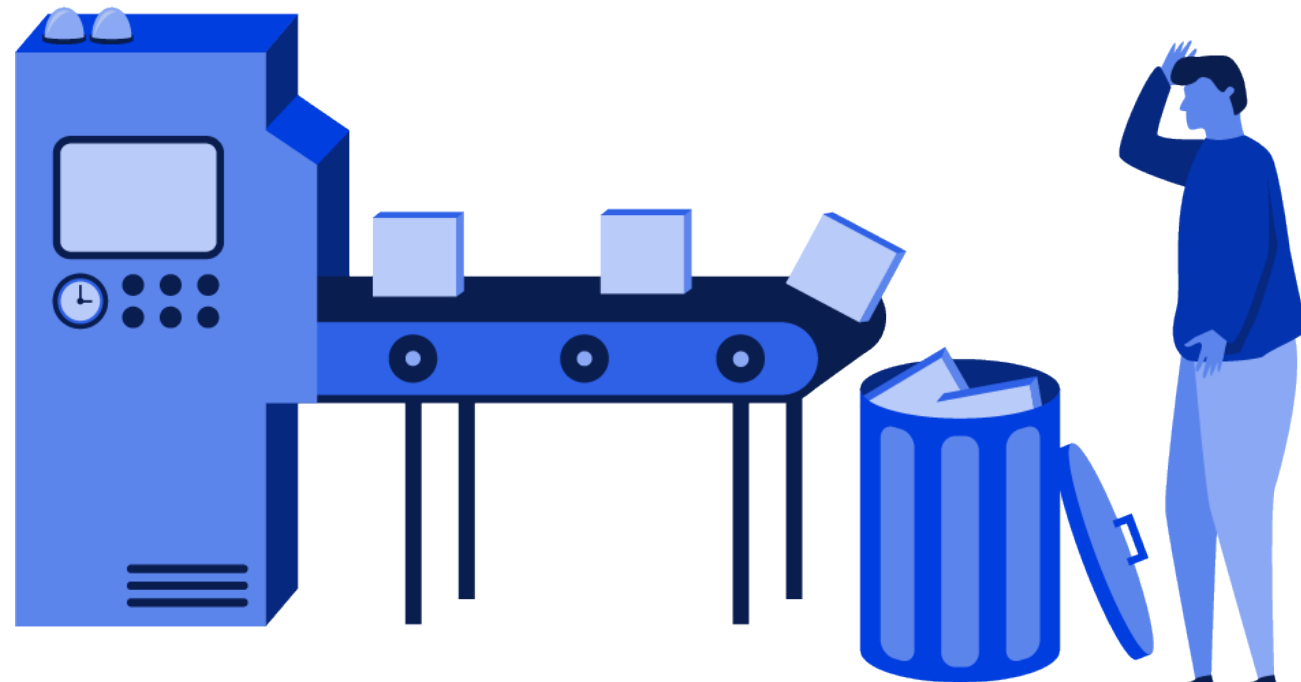


Part Four:

Lean Methodology

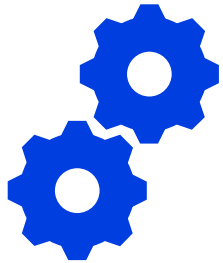
The Lean Methodology is an approach that looks for improvements in business processes by identifying and reducing waste.

This section will explore that approach, and begin to consider how it can be applied to digital transformation projects.



Part Four: Lean Methodology

Understanding Lean



Lean process improvement is a culture of ideas, tools, and processes that are designed to eliminate waste and improve workflow, to provide maximum value for minimum cost.



The companies that have success with Lean efforts are those that incorporate it as part of their culture.

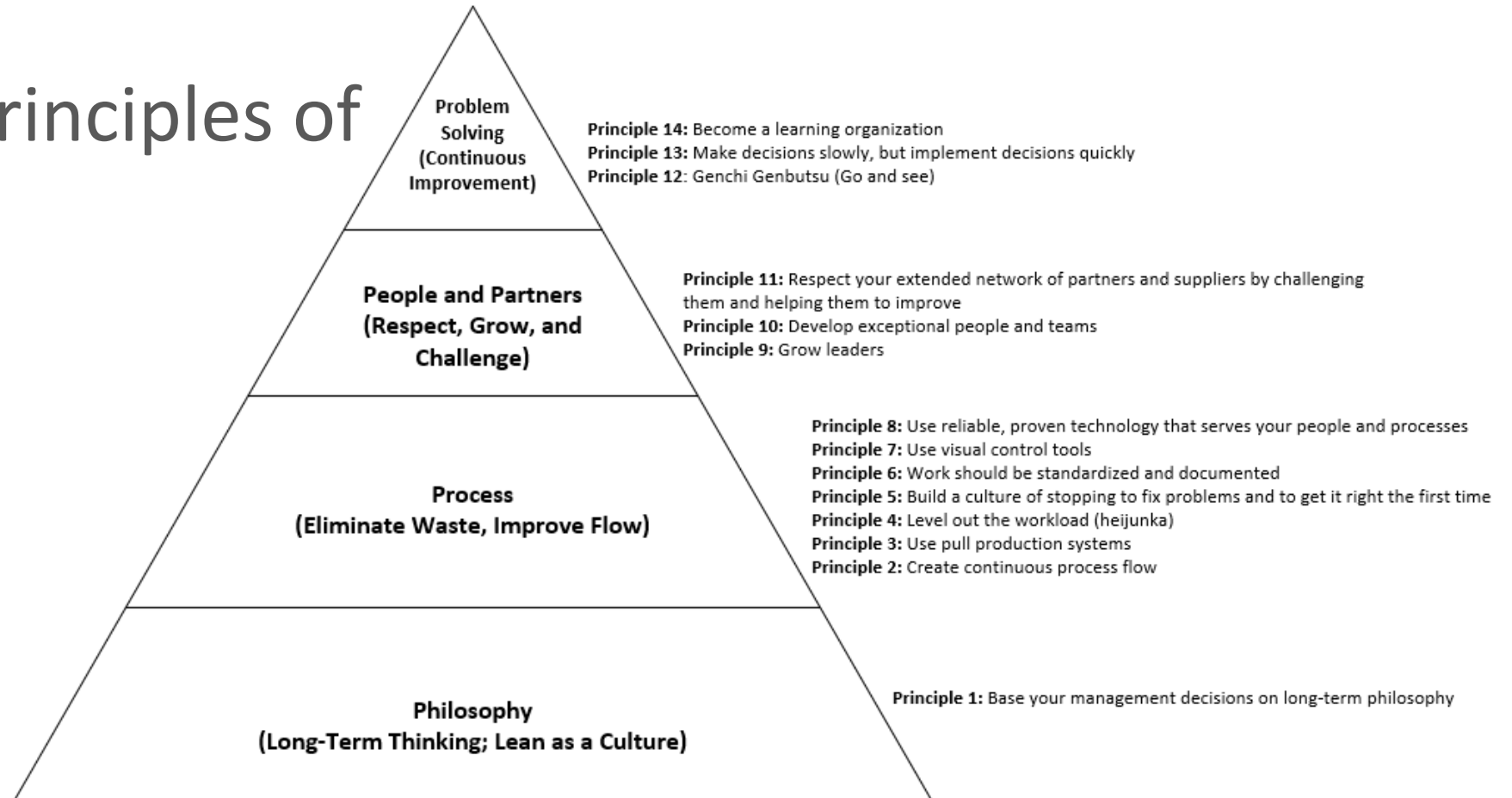


Lean refers to a set of tools that are designed to improve flow and reduce waste during a business process or material production.

Part Four: Lean Methodology

Understanding Lean

The four main principles of Lean:



Part Four: Lean Methodology

Eliminating Waste

Overproduction

Unnecessary
motion

Surplus
inventory

Unnecessary
processing
steps

Excessive
transportation

Idleness and
waiting

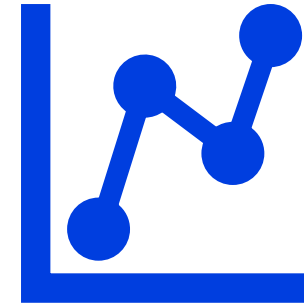
Defects

Part Four: Lean Methodology

Applying Lean to Digital Transformation



Lean principles can be combined with a digital approach – through the use of data to reduce waste and increase value.

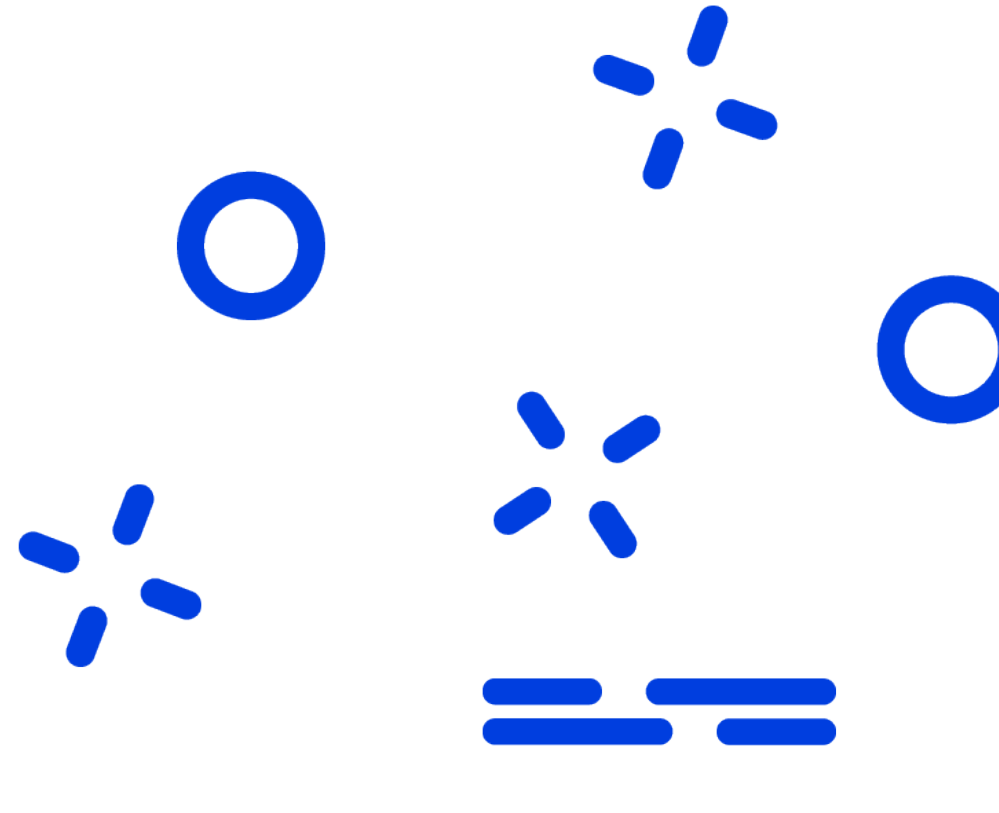


Because data is now abundantly available, it can be used for analytics and AI techniques to gain deep insights to support process changes needed to reduce waste and create better business value

Applying Lean to Digital Transformation

Value

- In terms of Lean, value means a desirable result from a product, service, or process that has some worth. Any process should put out more than it consumes.
- There are two basic ways to increase value: increase revenue or decrease cost.



Applying Lean to Digital Transformation

Waste

- Waste is the second key concept of Lean.
- It is the opposite of value: anything that is not wanted, or a result that has no worth.
- Eliminating waste is at the root of most, if not all, Lean processes.

