



WELCOME

PROCESS MAPS

From a Paper Tiger to a Management Tool for Process Optimization & Digitalization

Host and Speaker



VINCENT PAQUETTE
GLOBAL BUSINESS DEVELOPMENT



EUGENIO LOBO
BPM & EA CONSULTANT



About BOC Group – Facts & Figures

- 🌐 Offices and Partners Worldwide
- 👤 Product, Consulting, Training
- 🎯 0% Outsourcing, 100% BOC Group
- ☆ More than 20 Years of Experience



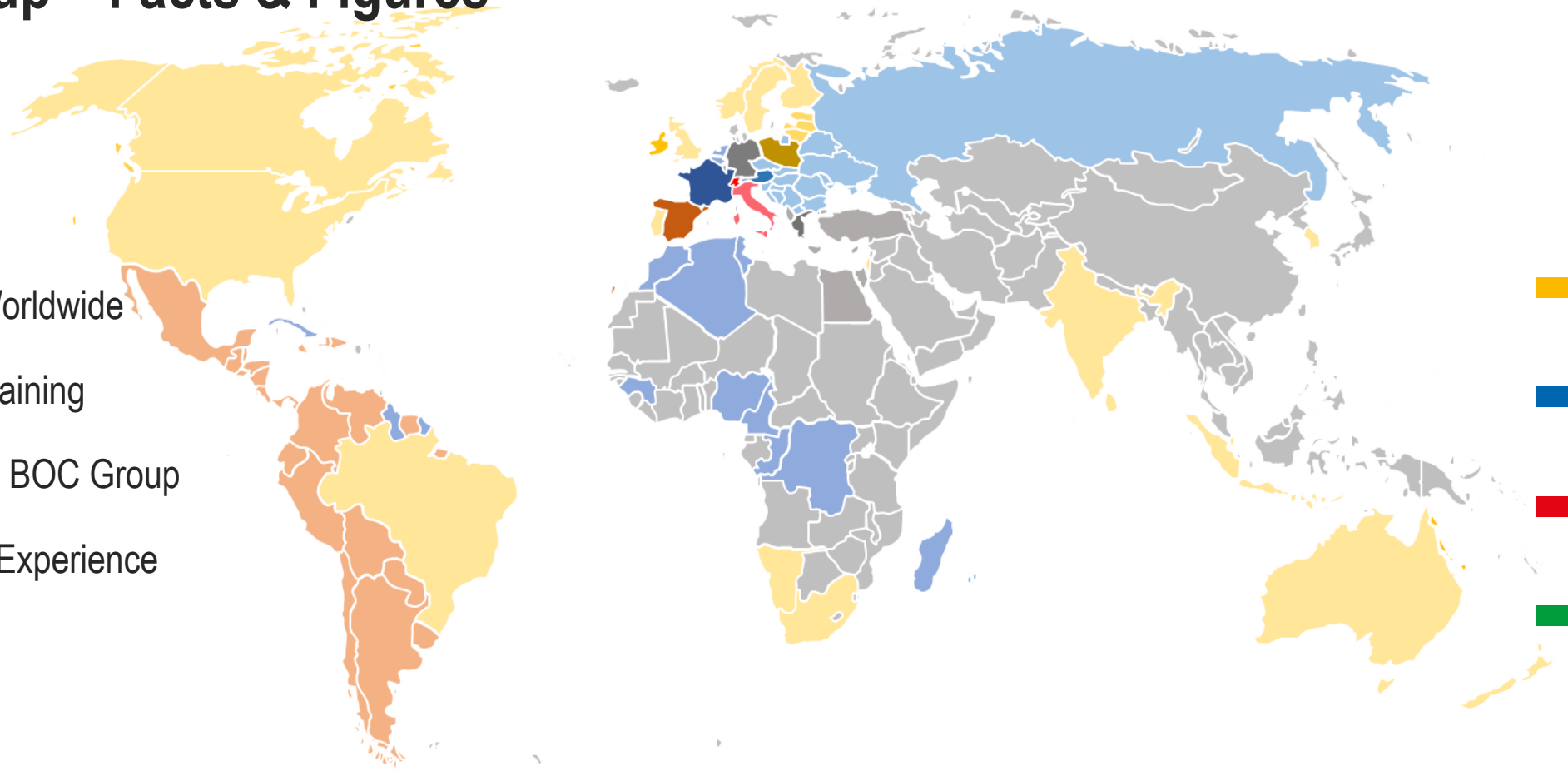
EMPLOYEES
230+
in 8 Countries

CUSTOMERS
1.000+
in 50+ Countries

PARTNERS
90+
in 25+ Countries

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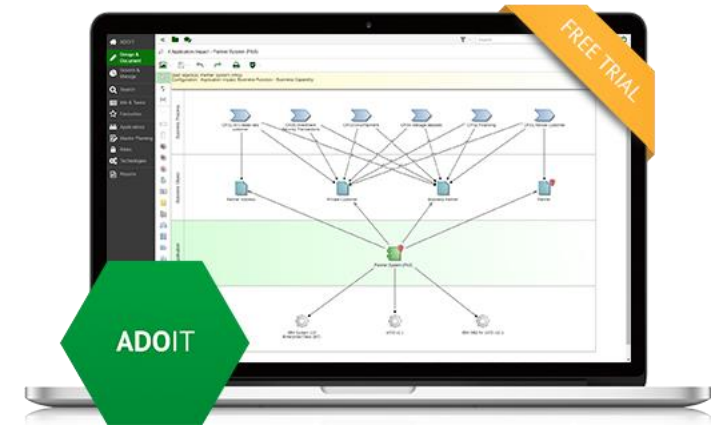
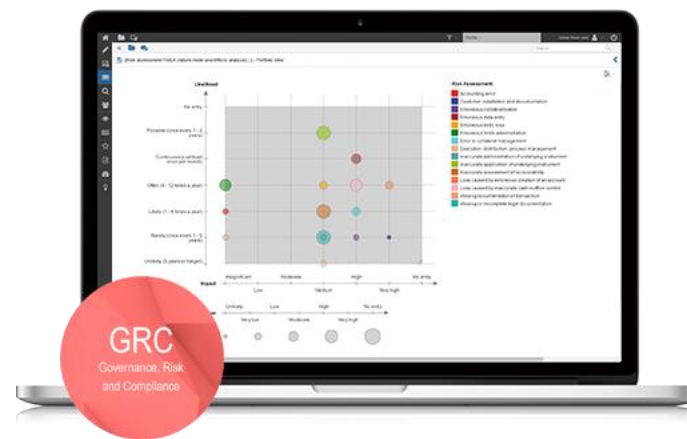



USER COMMUNITY
90.000+
in 120+ Countries

INSTALLATIONS
35.000+
in 80+ Countries

PROJECTS
5.000+
in 20+ Years

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 100% web-based

★ Simple and intuitive usage

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 Powerful analysis & reporting capabilities

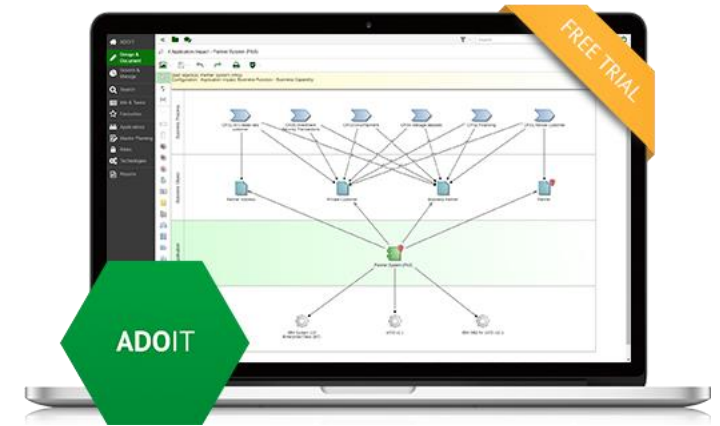
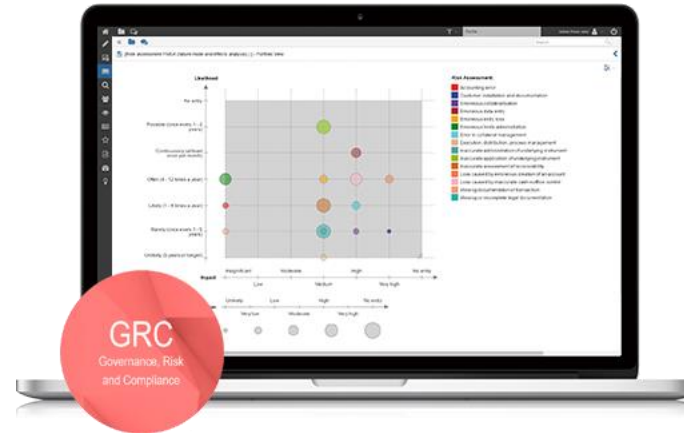
 Expandable scenarios

 Flexible configuration options

 Seamless integration with other tools

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Customer & Analyst Ratings



- ▶ BOC Group named a **“Visionary”** in the **2018 Gartner Magic Quadrant for Enterprise Architecture Tools**
- ▶ **Gartner Market Guide for Enterprise Business Process Analysis:** Representative Vendor for ADONIS
- ▶ **ADOIT** Receives the Highest Score in “Rearchitecting the Enterprise for Transformation” Use Case in **Gartner’s 2018 Critical Capabilities for Enterprise Architecture Tools**
- ▶ **Leader in Enterprise Architecture Management Suites**, The Forrester Wave™: “Enterprise Architecture Management Suites, Q2 2017”
- ▶ ADOIT featured in **OVUM “On the Radar” Report**



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PROCESS MAPS

From a Paper Tiger to a Management Tool for Process Optimization & Digitalization

What you will see today

1

Introduction

Structure of process documentation, definition of a process map, process management lifecycle

2

Process maps as an information instrument

Best Practices: Defining and organizing process maps

3

Process maps as optimization tool

Best Practice: Product / Process / Distribution / Standardization

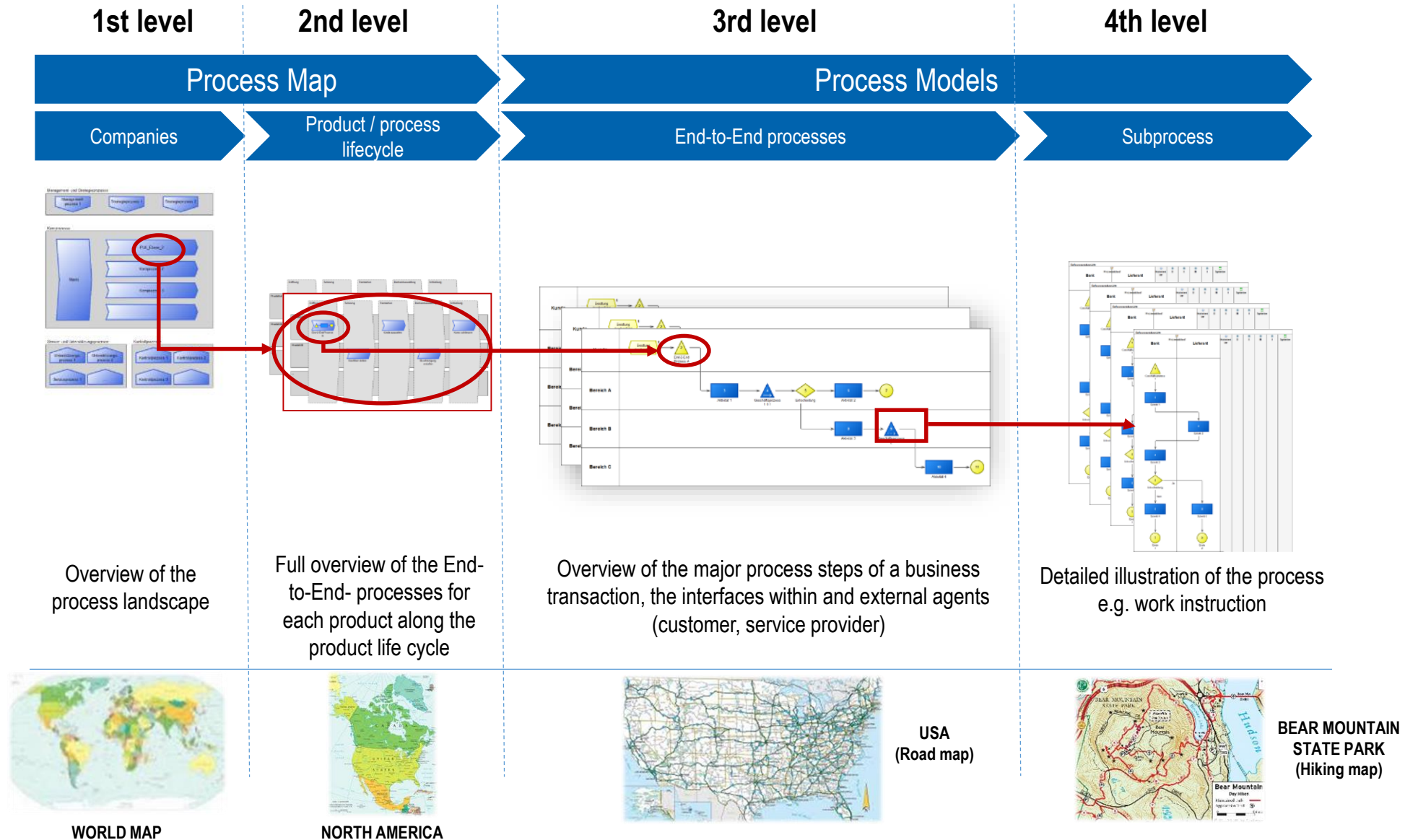
4

Process maps as a control instrument

Best Practice: Process definition and process responsibility



Structure of Process Documentation



Definition: Process Map

- ▶ *A process map looks at the business processes from a "**bird's-eye view**"- i.e. it abstracts regarding the life cycle of individual processes*
- ▶ *In doing so, it represents **Processes or process groups with** graphical elements*
- ▶ *The process map can include **multiple levels***
 - ▶ *depending on the complexity of the process map, it may be sufficient to display the map on 1 or 2 levels*
 - ▶ *as the complexity increases, multiple levels may be required.*



*The structure of the process map determines the **Think about processes** in the organization!*

Process Management Lifecycle Phases – A brief overview

Information Instrument



Derivation of process objectives and measurable indicators from the strategic goals of the company

Collection, maintenance and publication of process documentation (IST) processes:

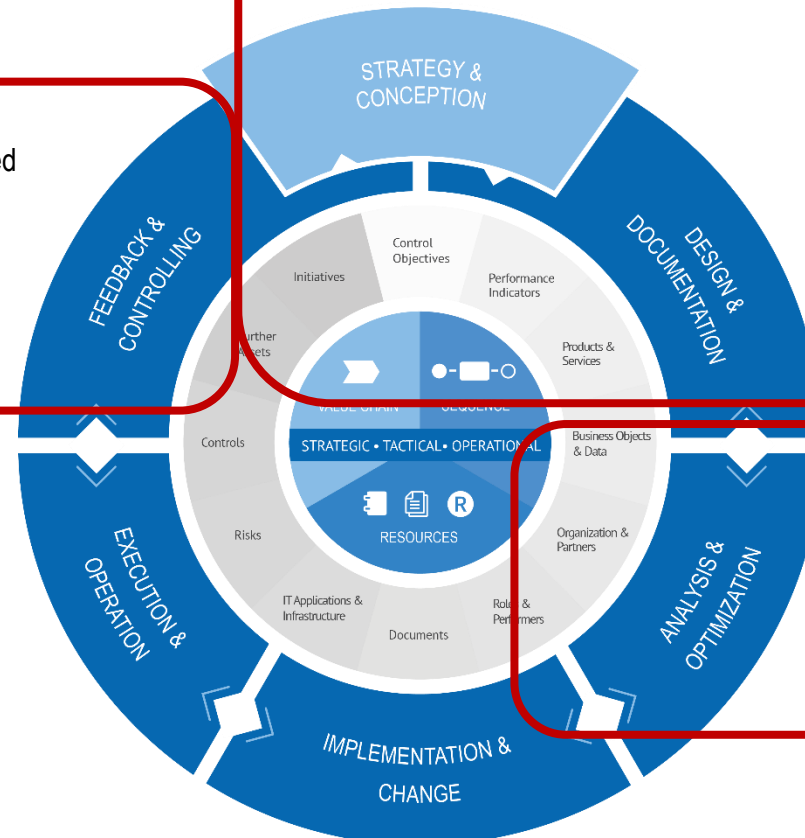
- Process maps
- Business process diagrams
- Organizational charts, etc.

Control instrument



Ongoing evaluation and control of the actual processes in terms of the defined process goals and metrics. Performance analysis as a basis for further optimization.

Implementation of the applicable current processes in daily business in organizational and technical terms. Recording data for process controlling.



Analysis of the current processes in terms of improvement in terms of the process goals (possibly based on performance analysis from the process controlling). Development and optimization of TARGET processes.



Optimization tool

Introduction and anchoring the TO-BE processes in organizational and technical terms. The TO-BE processes are "live" and from now on the new AS-IS processes.

Purpose of Process Maps



Information Instrument

- ▶ Structured overview of the business processes
- ▶ Navigational equipment
- ▶ Basis for the training of new employees



Optimization tool

- ▶ Identify cross-process optimization potential
- ▶ Standardization / harmonization impossible processes



Control instrument

- ▶ Stability in business model changes
- ▶ Documentation of the process responsibility
- ▶ Basis for a process-based management system



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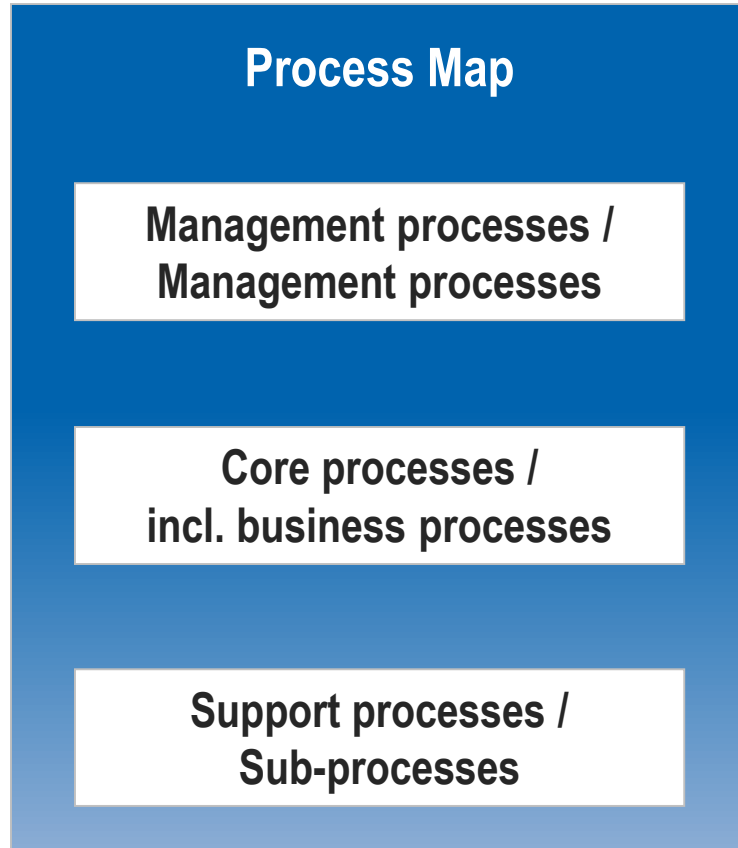
Control instrument

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Best Practice: Defining the Process Map

Define Process Types



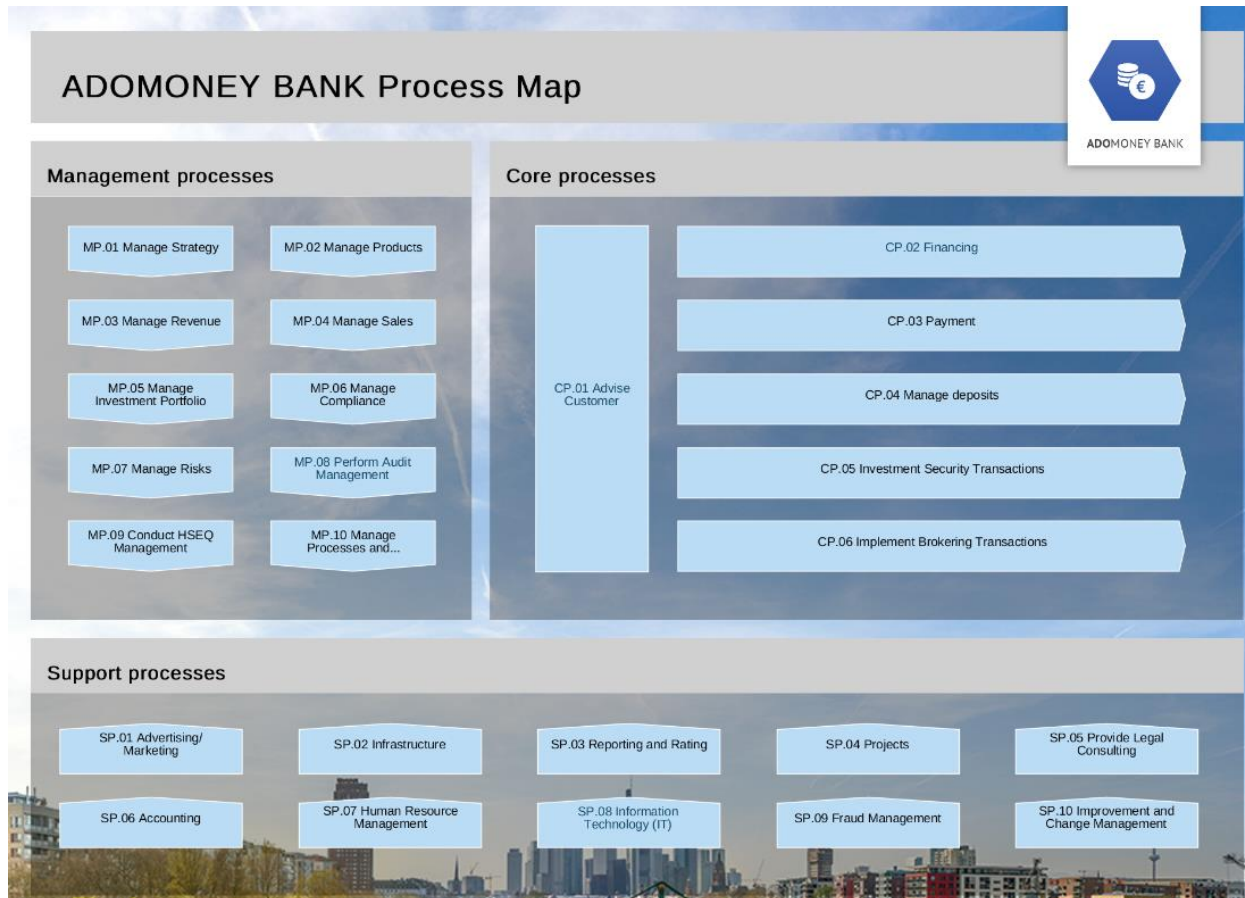
... are processes that the **strategic direction** of the organization and present the **organizational framework**

... are processes **creating products or services** create direct value

...are **processes to support other processes** (Internal clients), to ensure a smooth performance

Best Practice: Defining the Process Map

First level of the process map: Example Retail Bank



Representation of all major types of processes

Divided into:

- ▶ **Core Processes**
- ▶ **Mgmt. Processes**
- ▶ **Support Processes**

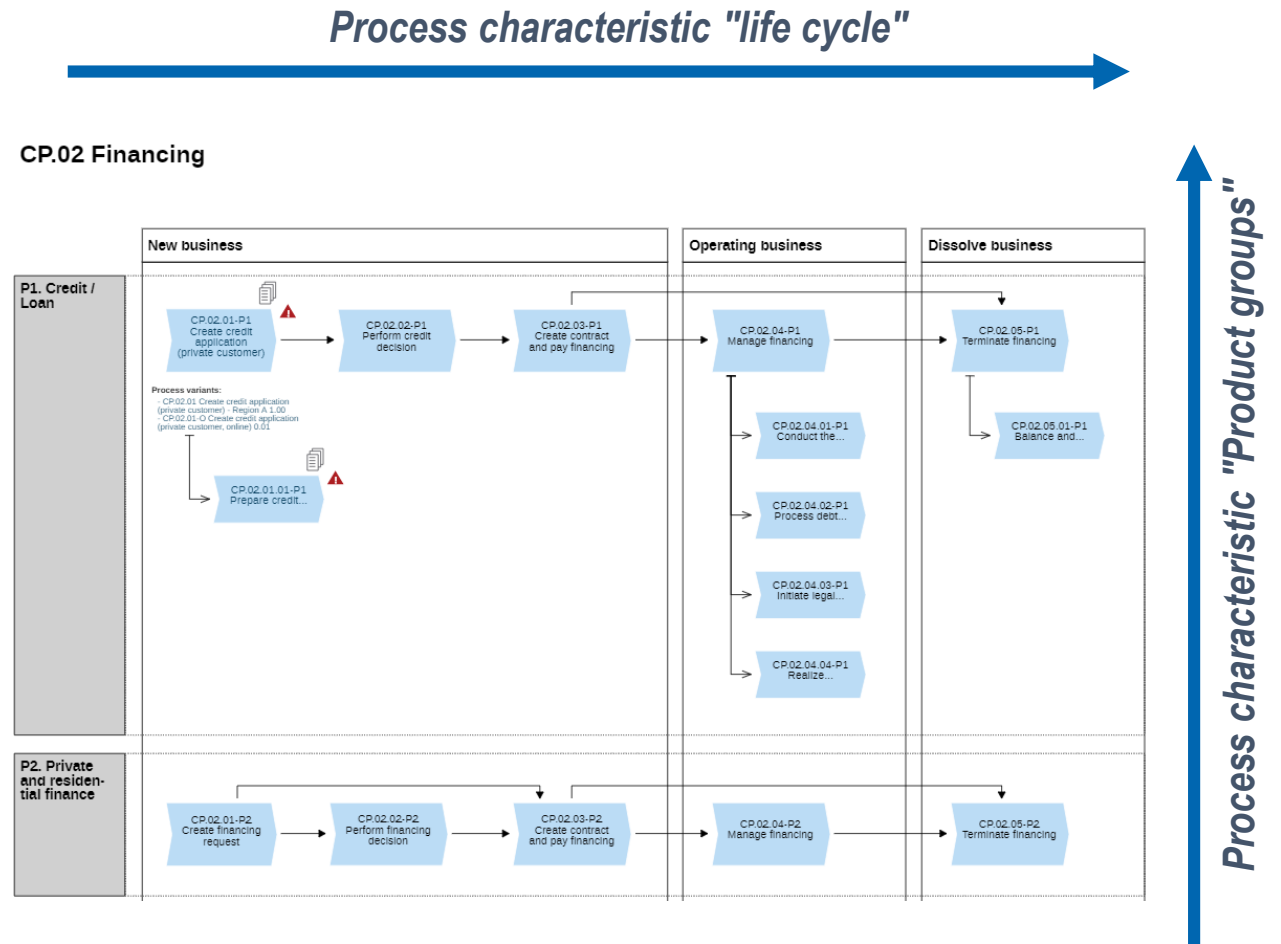
Best Practice: Defining the Process Map

Further levels of the process map: Example Retail Bank



Representation of the value chain
on the 2nd level in
2 dimensions

- ▶ **Product Groups**
- ▶ **Life Cycle**



Best Practice: Outline of Process Maps (1)

Process characteristics (determinants)



Process characteristics (determinants) represent factors that determine a process flow. The concept includes the following steps:

- ▶ **Identification** of the **process characteristics**
- ▶ Decision on which process characteristics **separate processes** and which merely lead to **separate paths in the process flow**

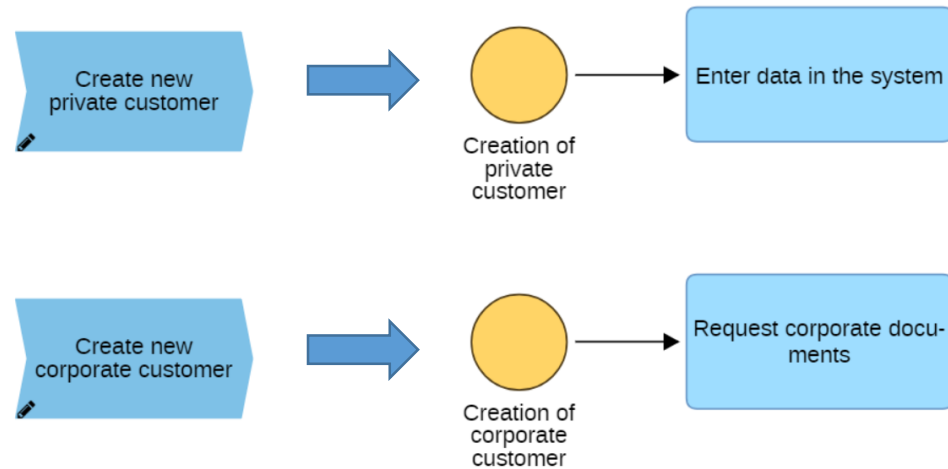


The **process characteristics are often dependent on the respective industry** in which a company operates: the processes of a company operating in the financial services sector will often be defined by different characteristics than that of a manufacturing company.

Best Practice: Outline of Process Maps (2)

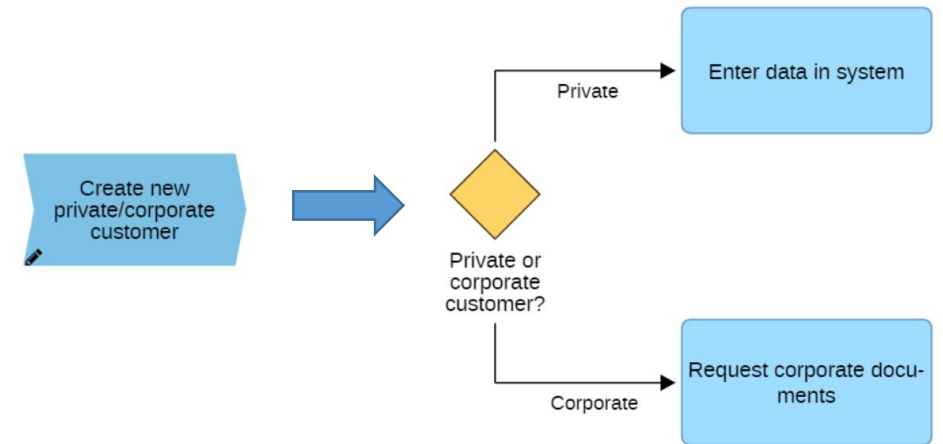
Process characteristics (determinants)

For a company, the influence can be as **high** is leads to **different processes** even at the process map level.



Different / separate processes

The influence of the determinants **low**, The same process is used and there is **different flow paths** within the same process.

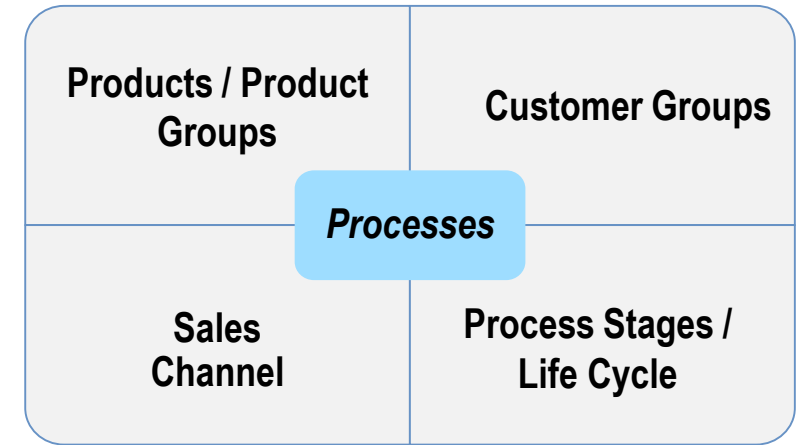


Decision within a process

Best Practice: Outline of Process Maps (3)

Process characteristics (determinants)

- ▶ **Key Determinants** in any Organization are:
 - ▶ Products / Product Groups
 - ▶ Process Stages / Life Cycle / Supply Chain
 - ▶ Customer Groups
 - ▶ Distribution Channels
- ▶ **Other Determinants** include:
 - ▶ Organizational Units / Sites
 - ▶ IT Technology
- ▶ The determinants are obtained by answering the question:
What decisions affect my processes?



The determinants approach makes it possible to cut the process in a meaningful way and summarize

Purpose of process maps



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Control instrument

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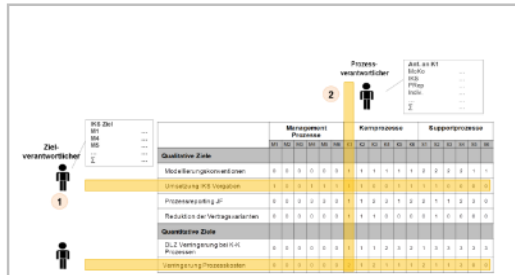


Process Optimization: Sometimes lack the holistic view?

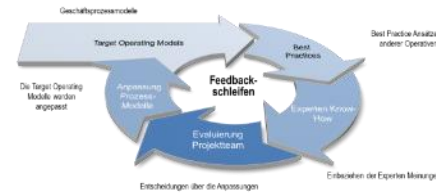
**"Transform processes.
do not just improve"**

(Forrester Report "The Process-driven Business of 2020", April 2012, www.forrester.com)

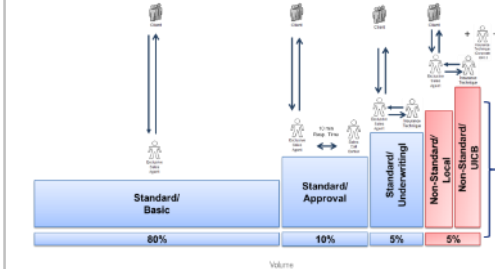
Holistic Process Optimization



Integration with the company's strategy?

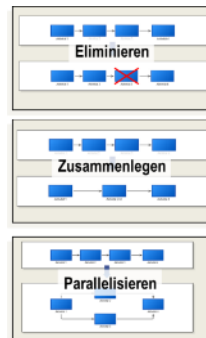


"Group" process optimization?



Product / Process standardization?

Detailed Process Optimization



- Verbreiteste Form von „radikalen“ Prozessverbesserungen
- Kosten und Zeitersparnis
- Verlangt „Mut“ und genaue Kenntnis des Geschäfts

- Optimierung bzgl. Qualität Gesamtprozess
- Konzentration auf die Kernprozesse

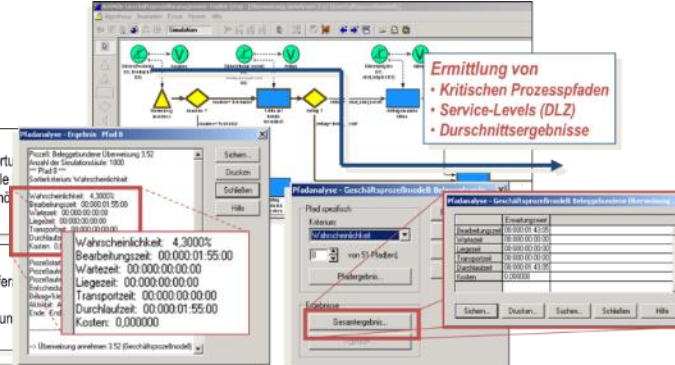


- Verkürzung der Durchlaufzeit
- Qualitätssteigerung durch Reduzierung von Fehlern
- geringerer Koordinationsaufwand

- Verlagerung der Prozessverantwortung
- Ersatz von Fixkosten durch variable Kosten
- Konzentration auf Kernprozesse

- ggf. mehr Nutzen für Kunden, Lieferanten, Abnehmer
- Achtung: Gefahr von Mehrkosten und Verzögerungen

- Vereinfachung der Verfahren und größere Prozessautonomie
- unterschiedliche Behandlung der Geschäftsfälle
- Kosten- und Zeitersparnis



Ermittlung von
• Kritischen Prozesspfaden
• Service-Levels (DLZ)
• Durchschnittsergebnisse

Problem: Product and Process Standardization



Problem:

- ▶ Rules and **requirements of product management** sometimes "hinder" the cross-product process standardization
- ▶ Also wants **each distribution channel** to have its own "special solution"
- ▶ Critical analysis of the **product-specific and distribution-specific rules and variants!**



Method:

- ▶ **Transparent treatment** of the **product and process differences** in the actual analysis ("patchwork")
- ▶ Structured Development of **standardized product variants** and thus **process variants** for the TARGET processes

Problem: Product and Process Standardization

Actual processes: No standardization – individual processes for each product / sales channel

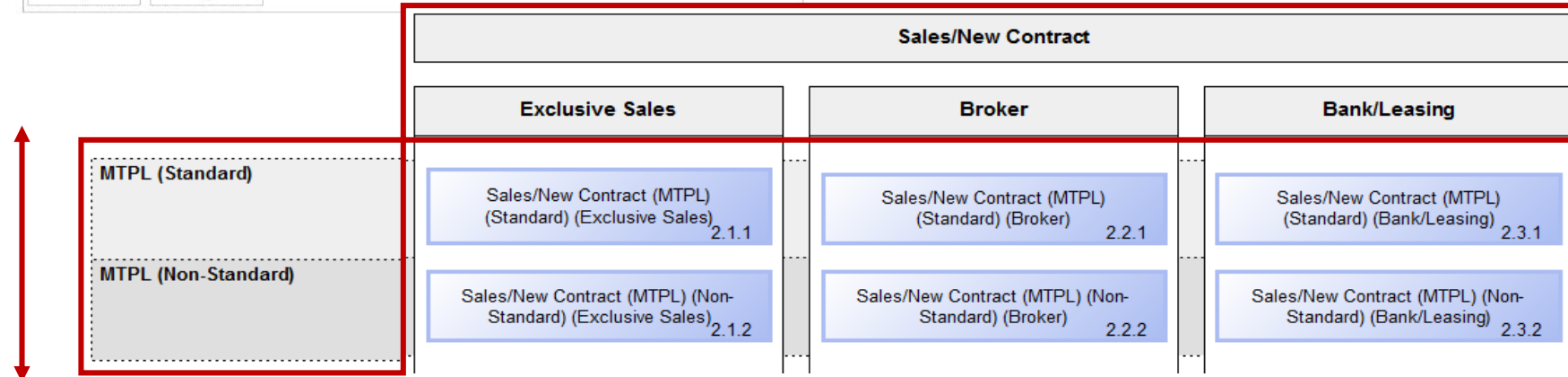
The screenshot shows a software interface with multiple columns and rows. A red box highlights a specific section, and a red double-headed arrow indicates a range of rows.

Distribution Channels:

- ▶ Exclusive Distribution
- ▶ Estate Agents
- ▶ Bank / Leasing

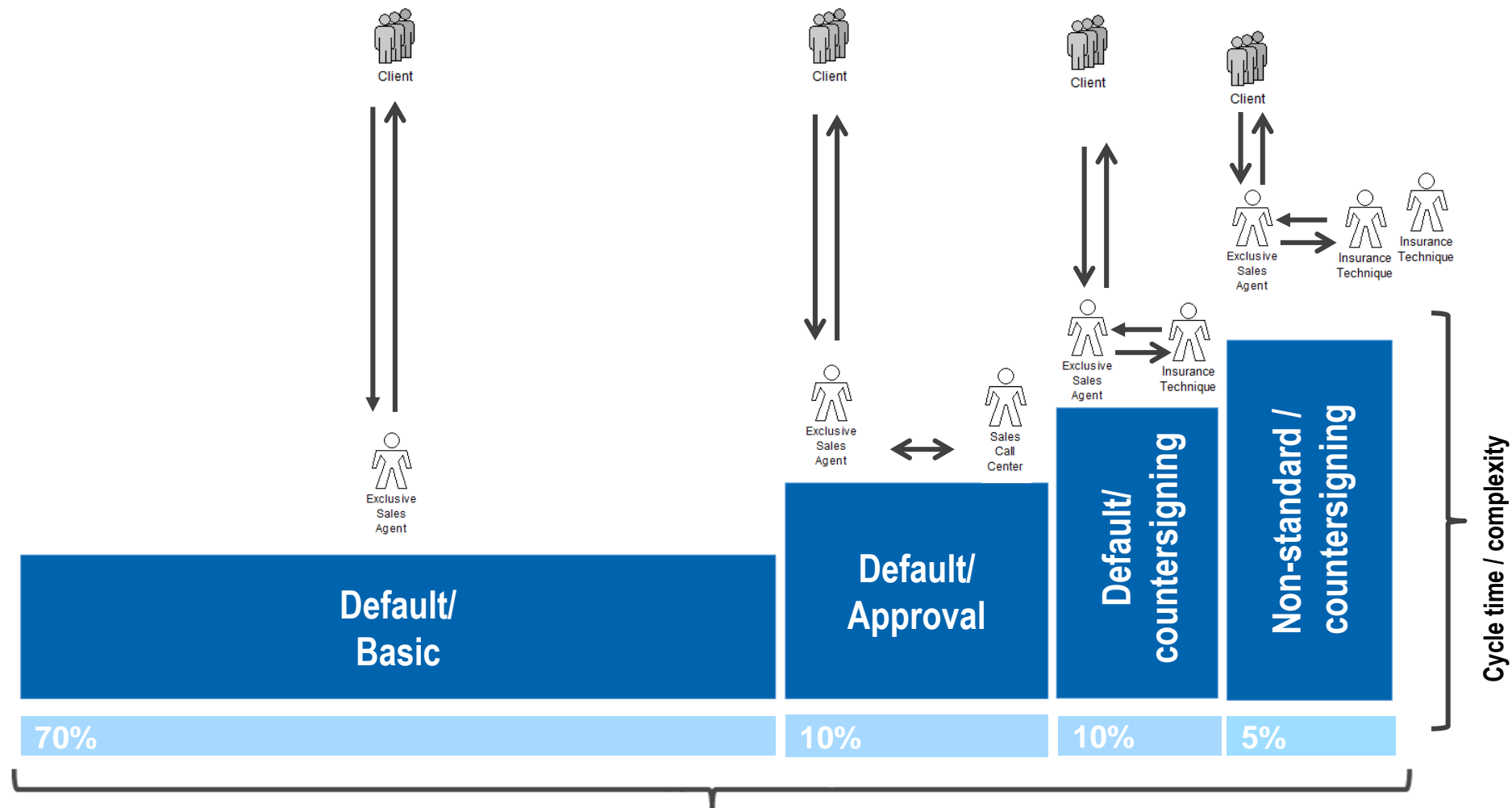
Product Groups / Line Of Business:

- ▶ Car Insurance
- ▶ Car Kasko
- ▶ Stuff
- ▶ Life
- ▶ Suffer



Best Practice: Structured variant form in the TO-BE processes (1)

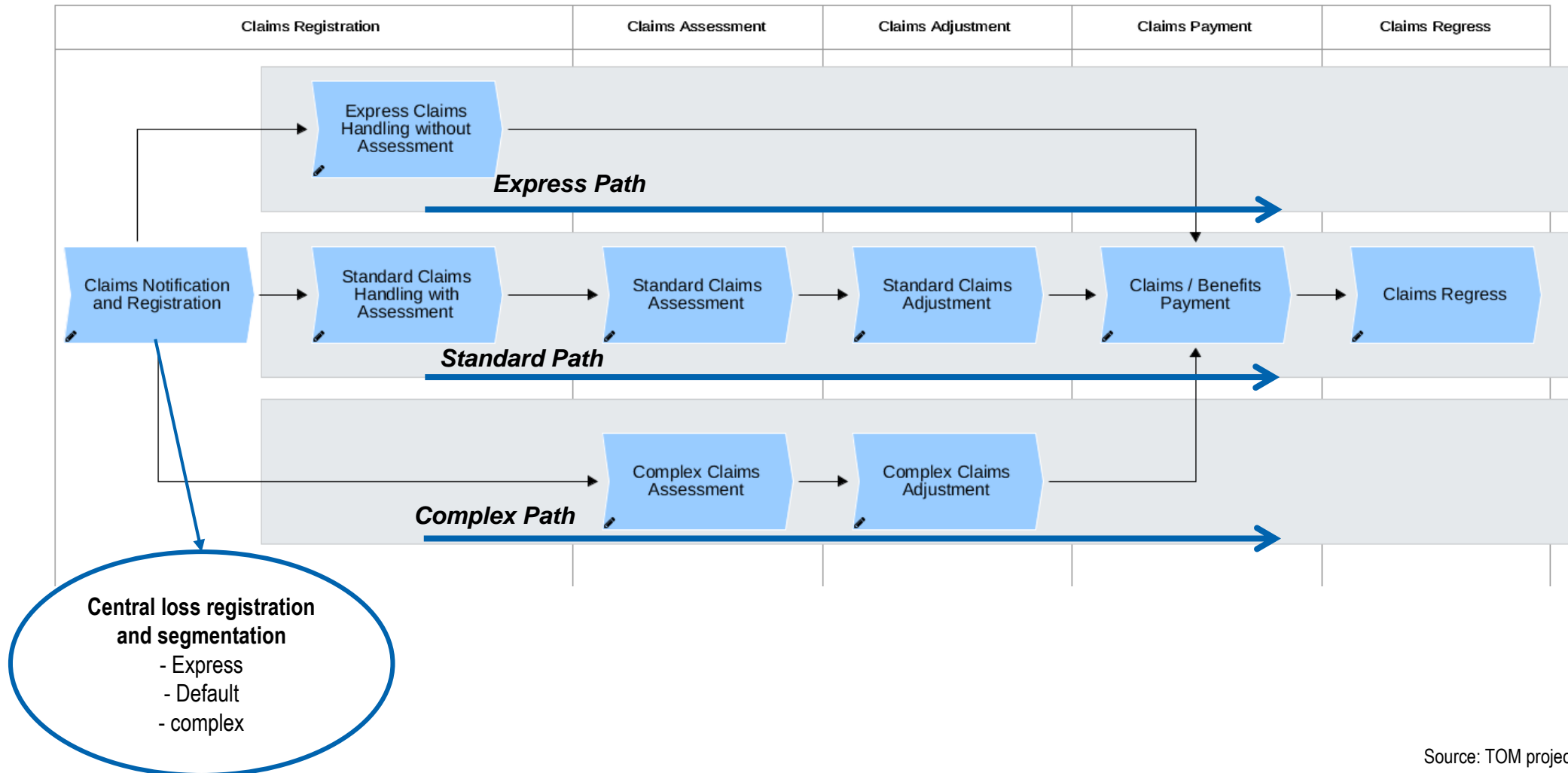
Target process: Standardization and Governance



Source: TOM project / UNIQA International

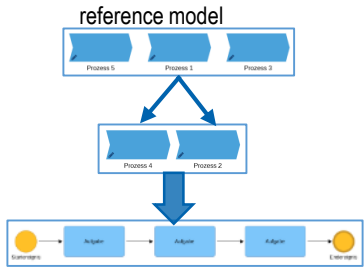
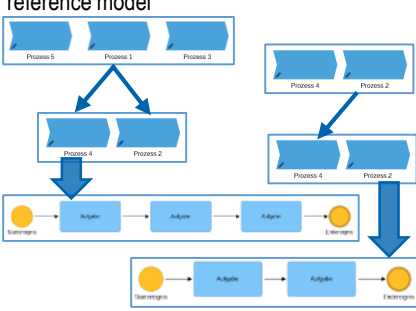
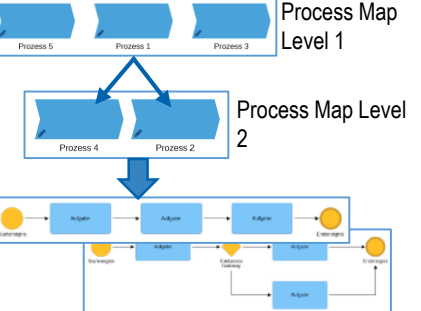
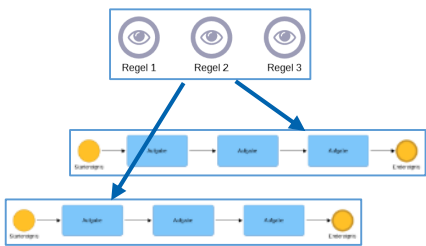
Best Practice: Structured variant form in the TO-BE processes (2)

Target process: "triage" concept for many types of processes possible



Source: TOM project / UNIQA International

Process Specifications / Process Variants

1 "Default"	2 "Template"	3 "Structure" / "Preferences"	
			
<ul style="list-style-type: none"> ▶ The process map and (all) detailed processes are defined as reference and described ▶ Each unit must adhere exactly to the specifications. 	<ul style="list-style-type: none"> ▶ The process map and (selected) detailed processes are defined as a reference. ▶ Each local unit must comply with this requirement in the design of their own process maps and procedures. ▶ Local adaptations of processes ("80% - 20%") allowed 	<ul style="list-style-type: none"> ▶ The process map is defined as a reference plane. ▶ Each process must fit in the given structure, of which the details are set locally and individually. 	<ul style="list-style-type: none"> ▶ Relevant requirements are set Control Objectives set ▶ In the Process design you have to follow the rules by which the processes are defined, individually and locally.


precise, detailed specification
loose, rough

Purpose of Process Maps



Information Instrument

- ▶ Structured overview of the business processes
- ▶ Navigational Equipment
- ▶ Basis for the training of new employees



Optimization tool

- ▶ Identify cross-process optimization potential
- ▶ Standardization / harmonization impossible processes

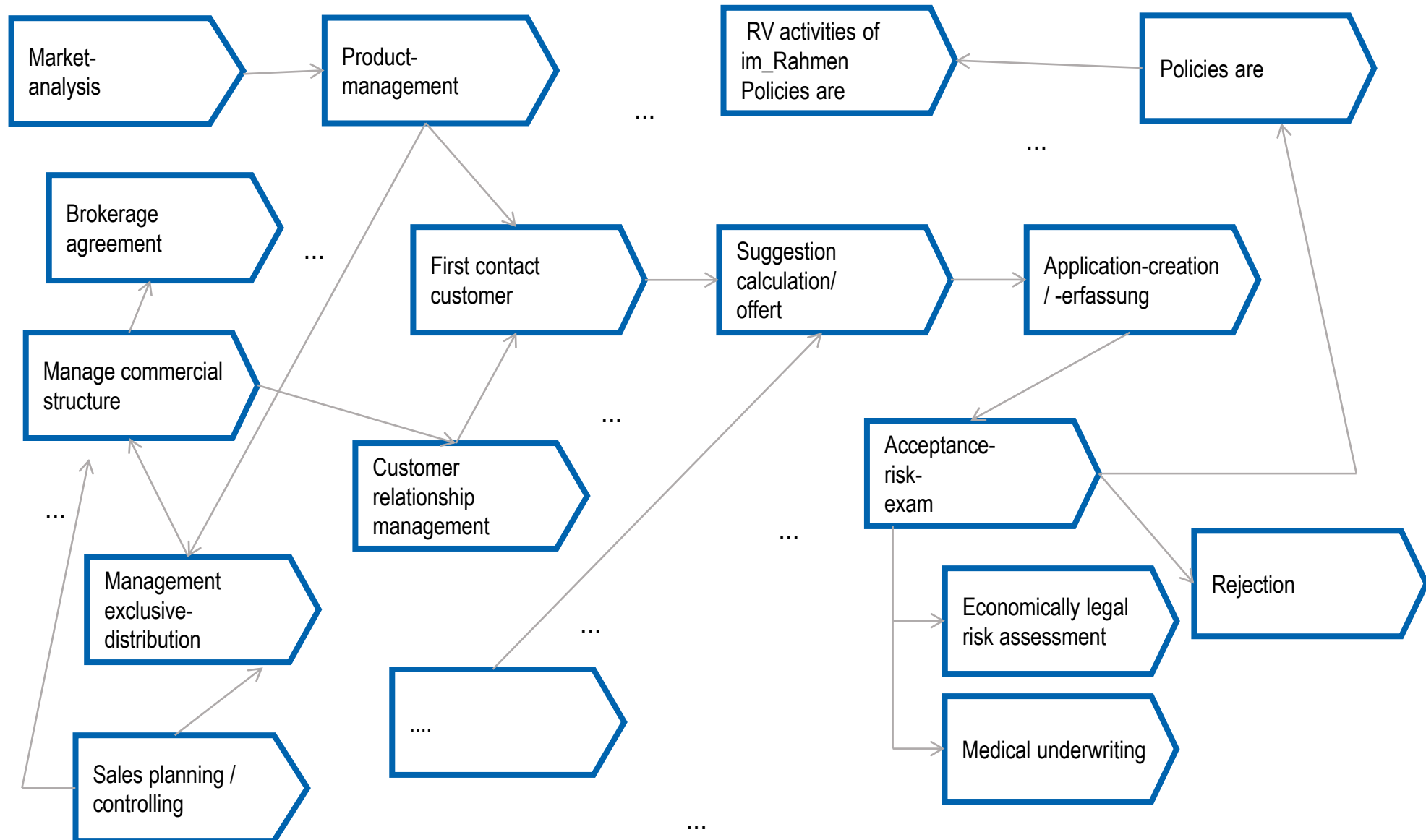


Control instrument

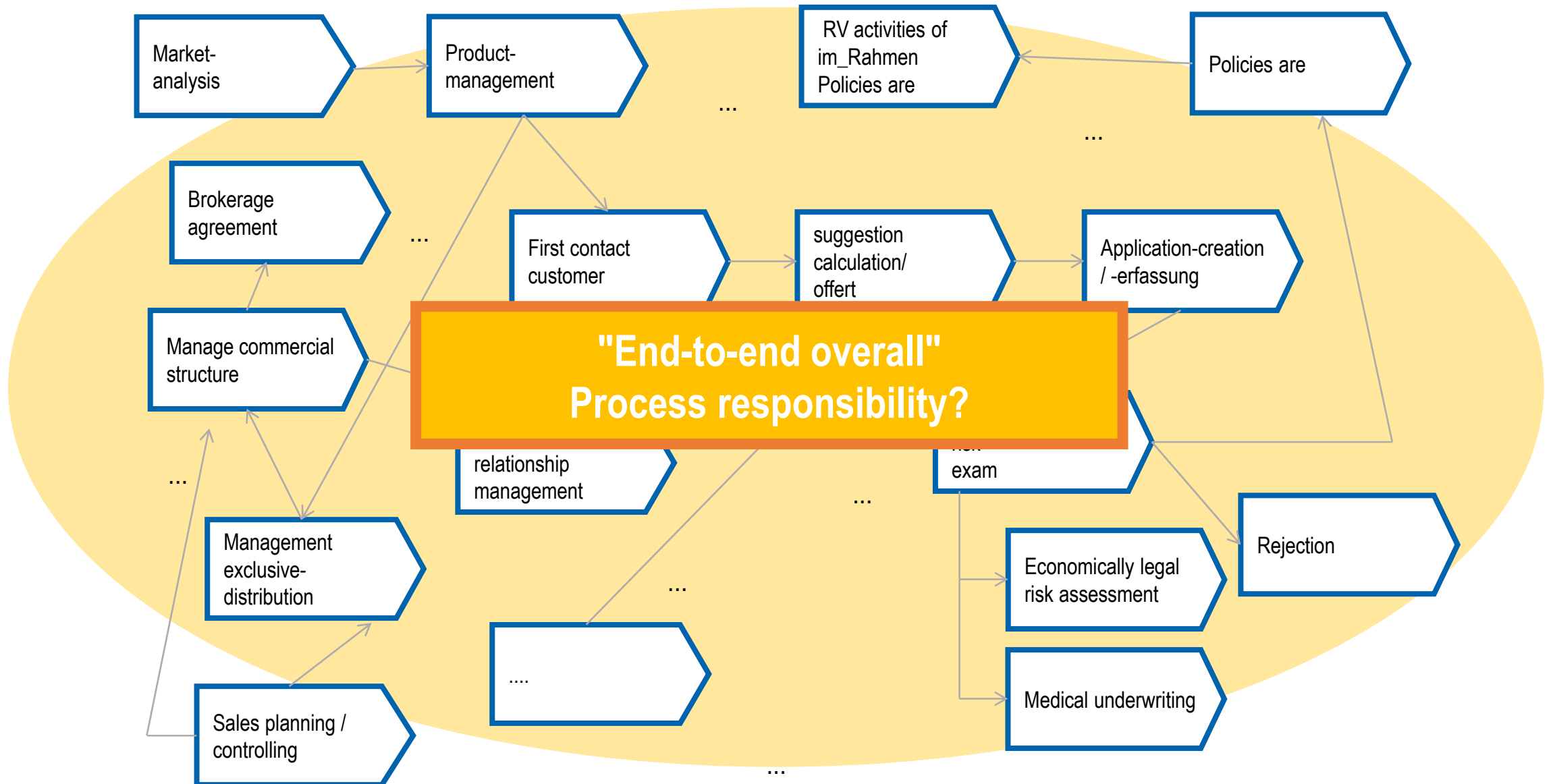
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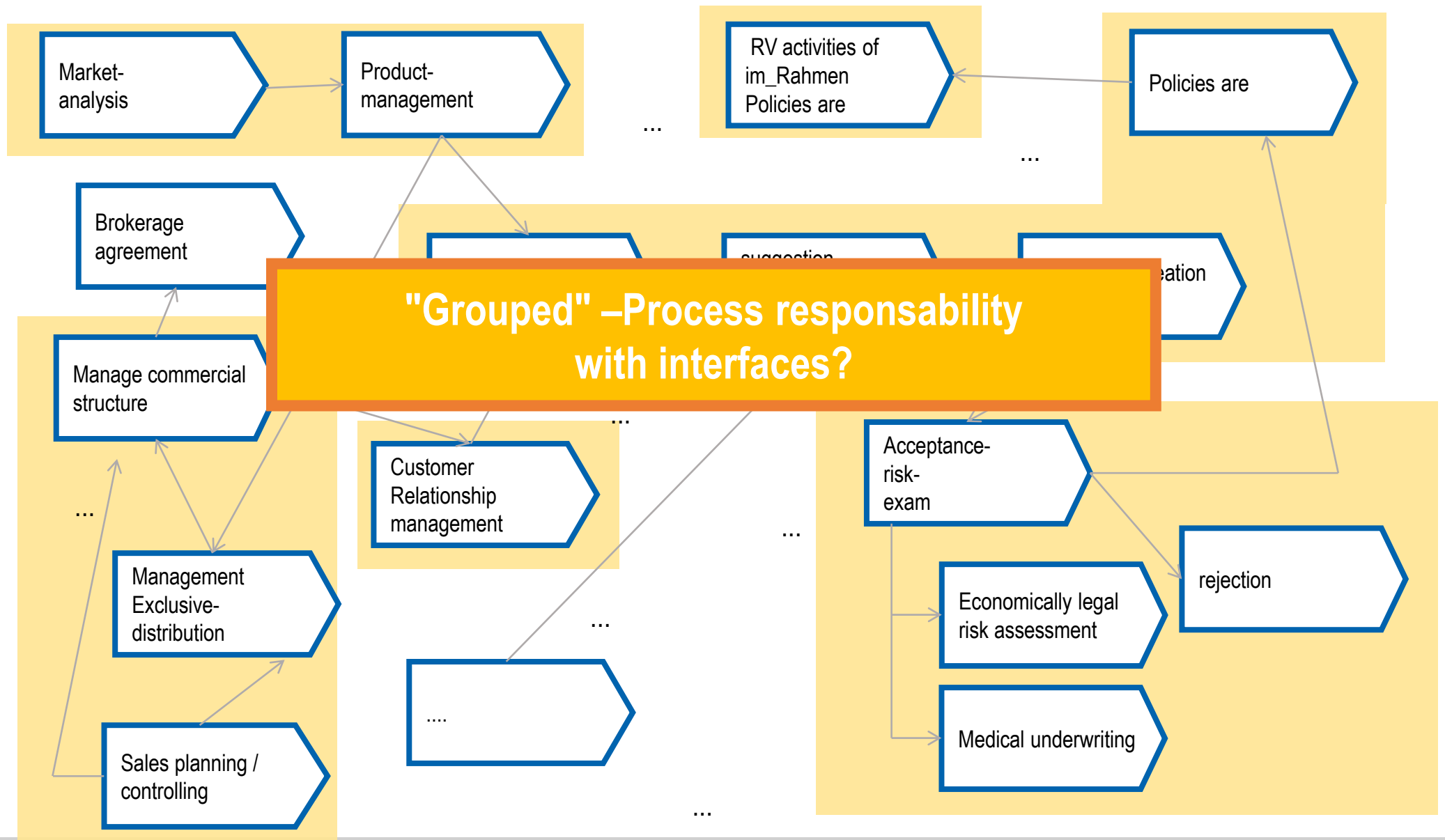
Problem: Process definition and responsibility



Problem: Process definition and responsibility



Problem: Process definition and responsibility



Best Practice: Process definition and Process Responsibility (1)

- ▶ As part of the target setting for processes, the **coordination of process owners** amongst themselves is essential **success**,
- ▶ Here, there is the **"Tailoring" of processes** where **critical elements** are defined.

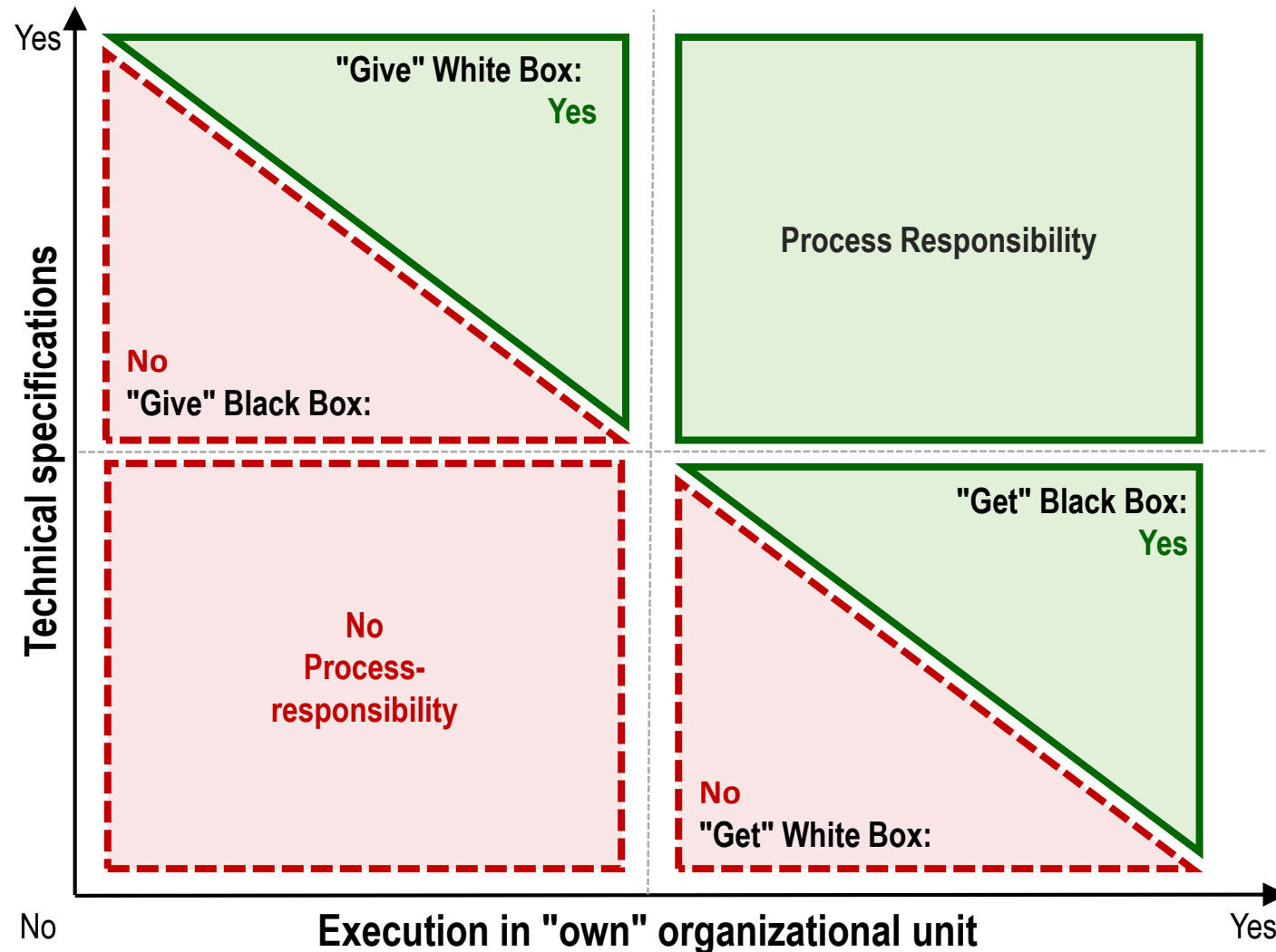


Answering the question **"Who is responsible for process X?"**:

- ▶ Is the **organizational unit executing the process** the best **candidate** for process responsibility?
- ▶ Is it whoever is creating the **technical specifications for the implementation** of the respective process and its activities?

Best Practice: Process definition and Process Responsibility (2)

"White box" – "Black box" requirements for process execution



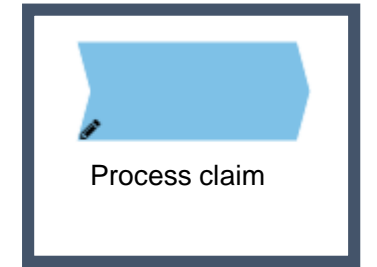
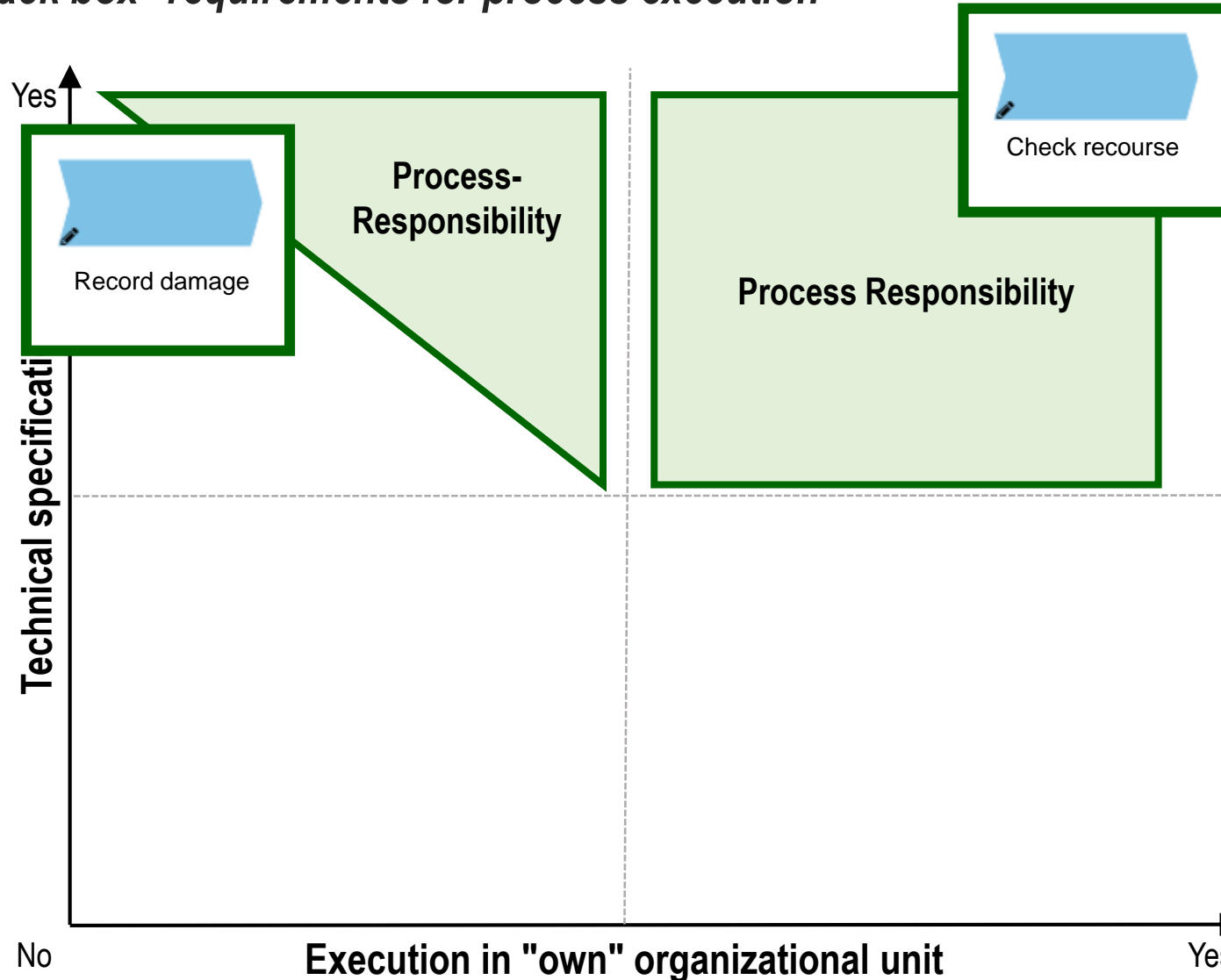
Best Practice: Process definition and Process Responsibility (3)

"White box" – "Black box" requirements for process execution

Claims Department

VS.

Central Document Management

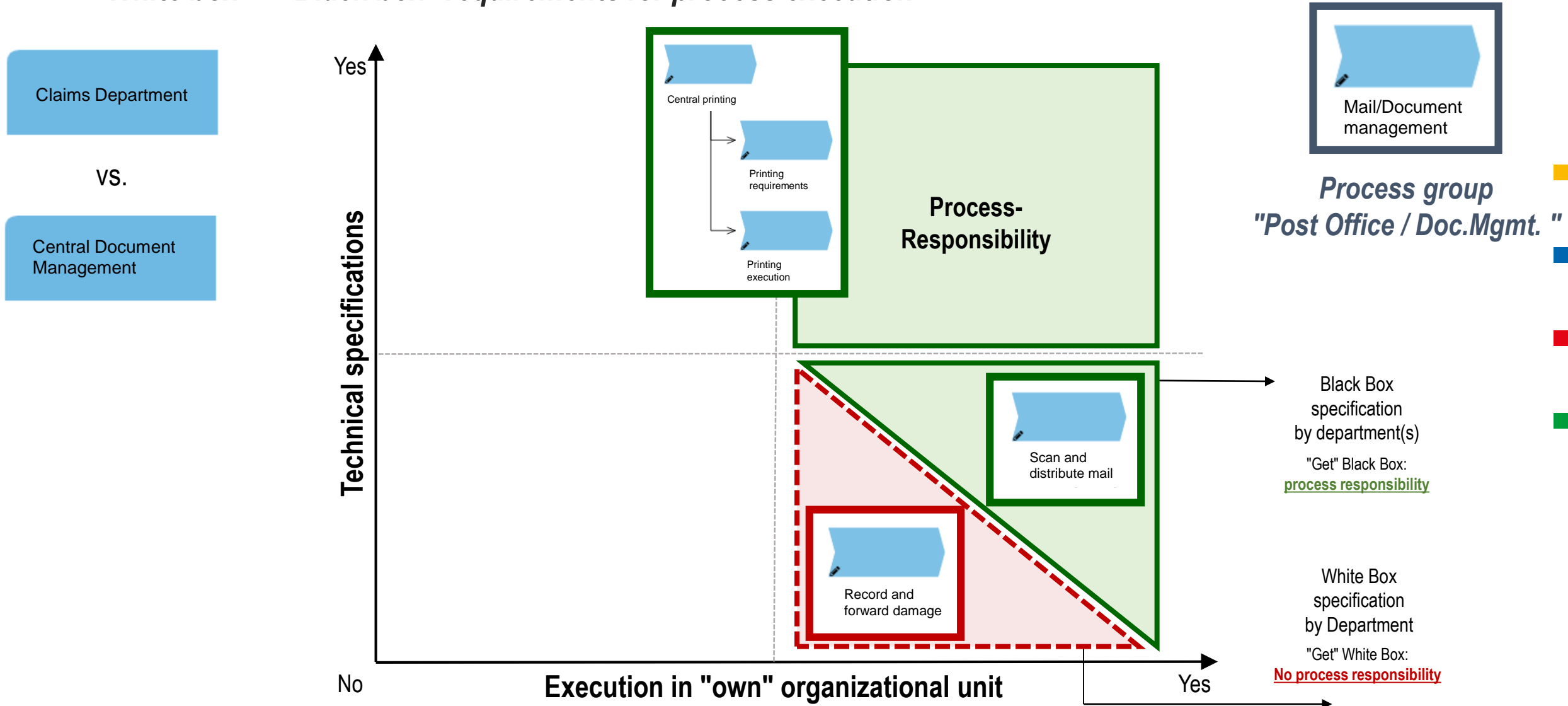


*Process group
"Damage property/
Cars / Liability "*

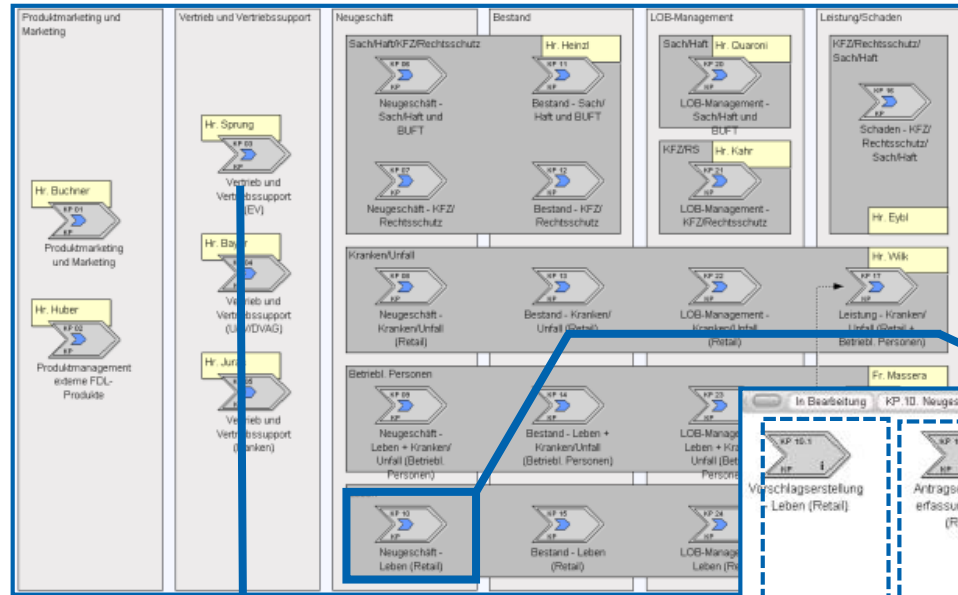


Best Practice: Process definition and Process Responsibility (4)

"White box" – "Black box" requirements for process execution



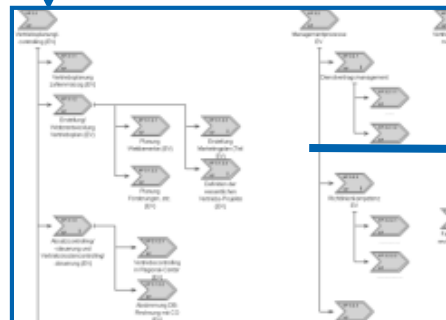
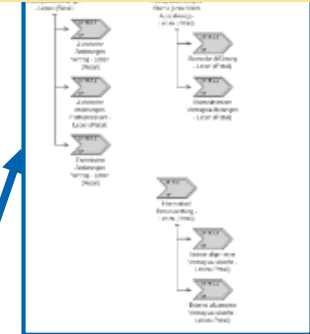
Best Practice: Process definition and Process Responsibility (5)



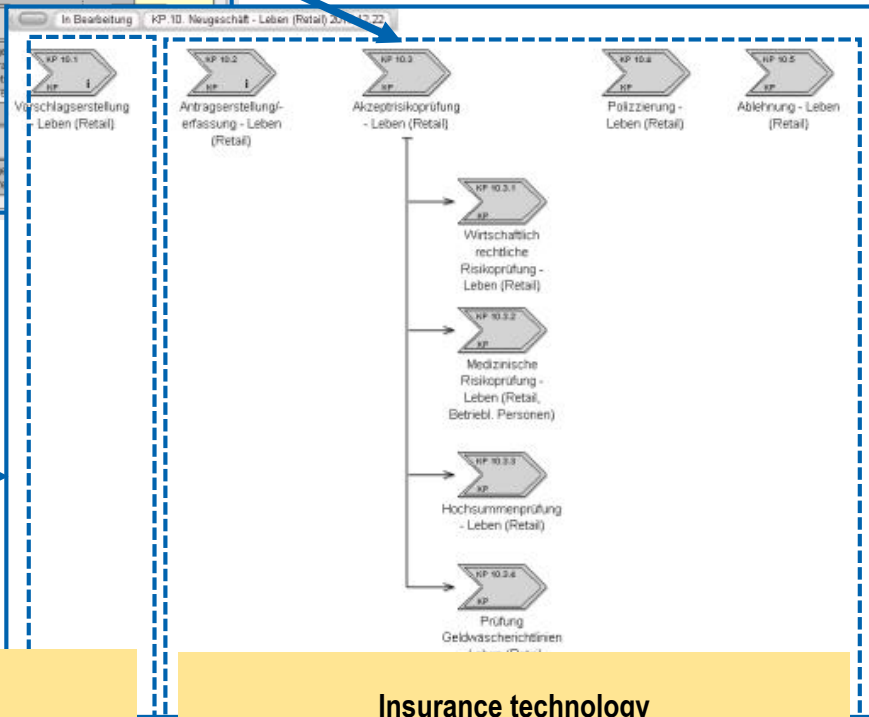
Fundamental question:

Who is responsible for which parts of the process map?

Insurance technology



Sales and Sales support



Insurance technology

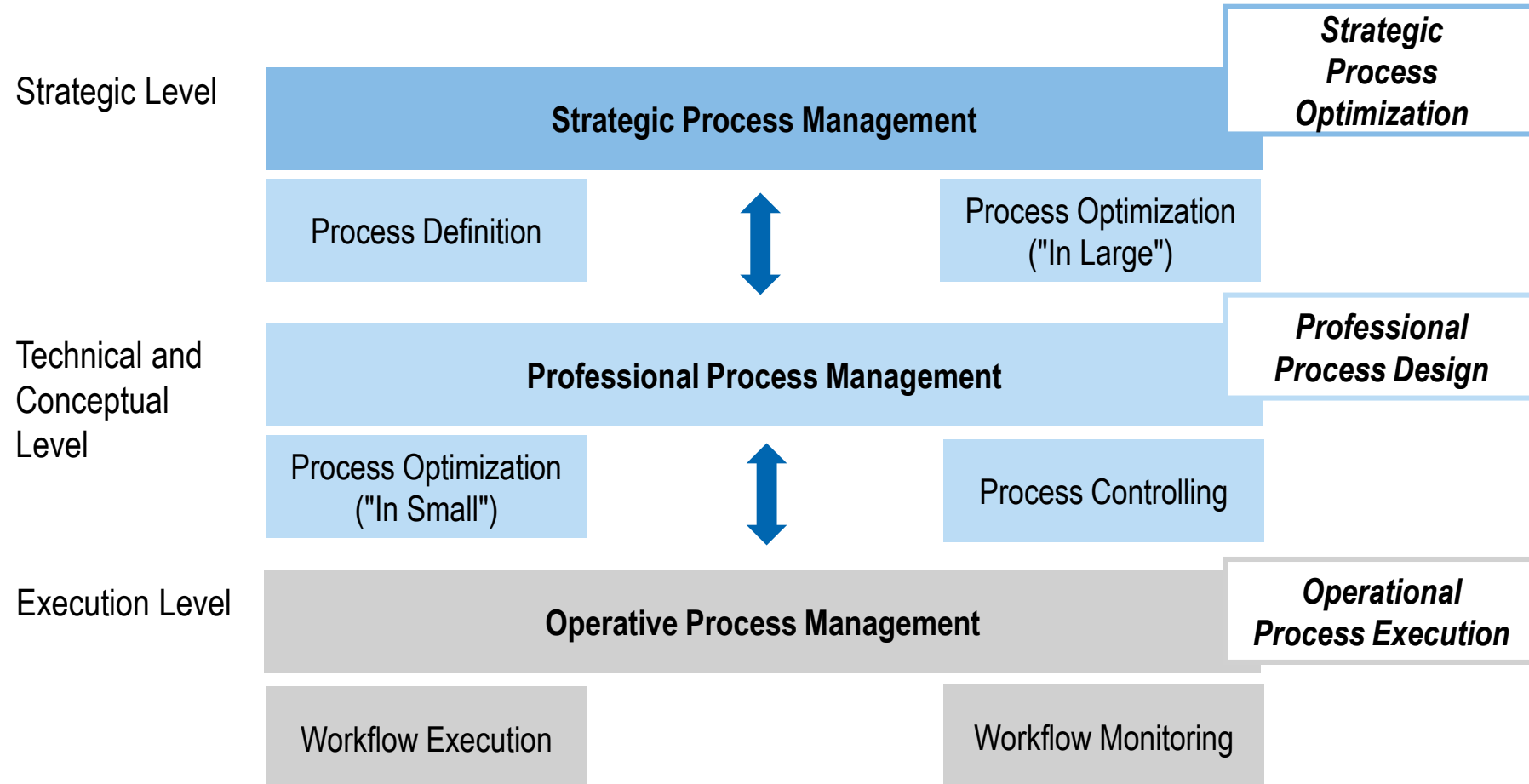


Reinsurance

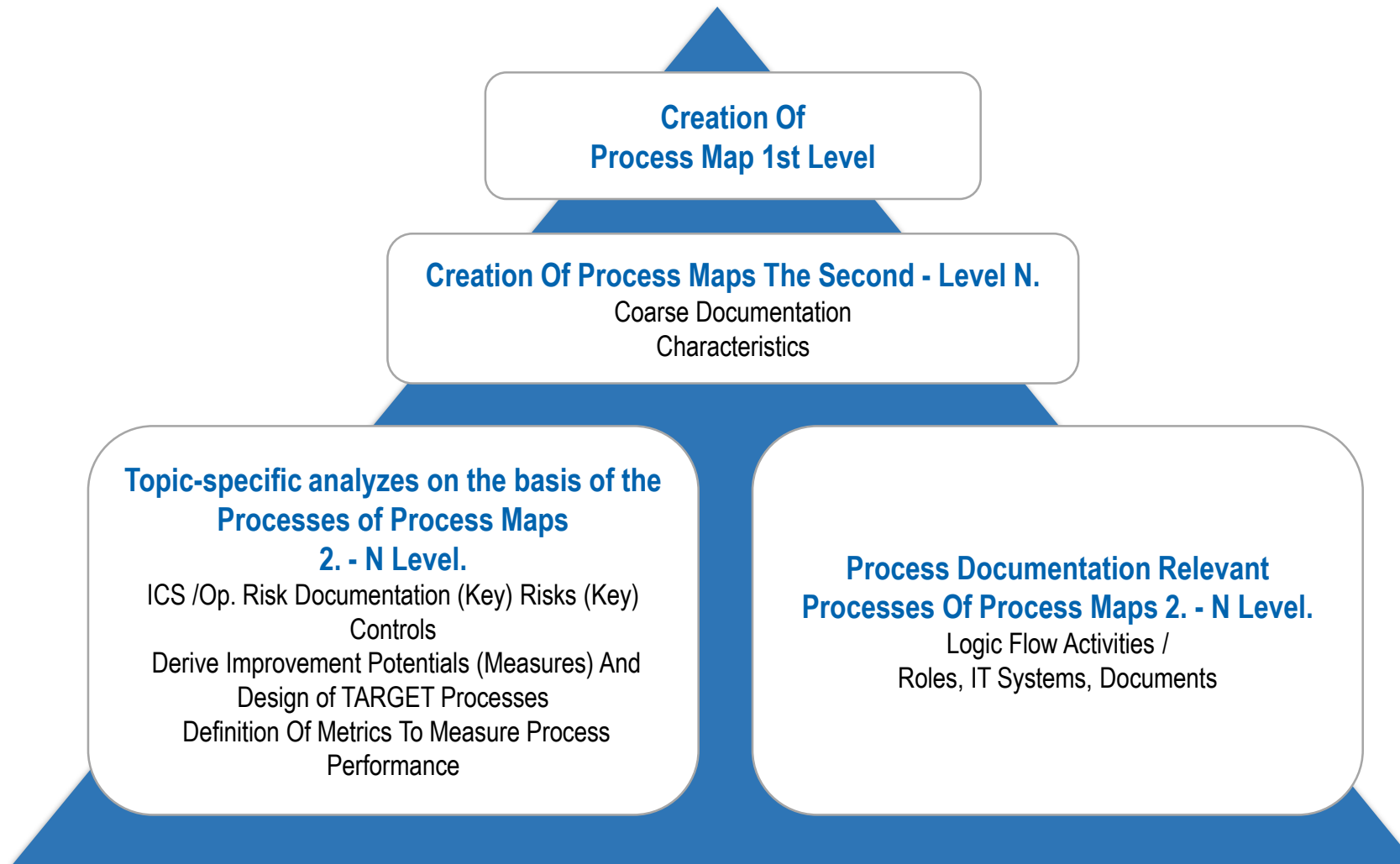


SUMMARY

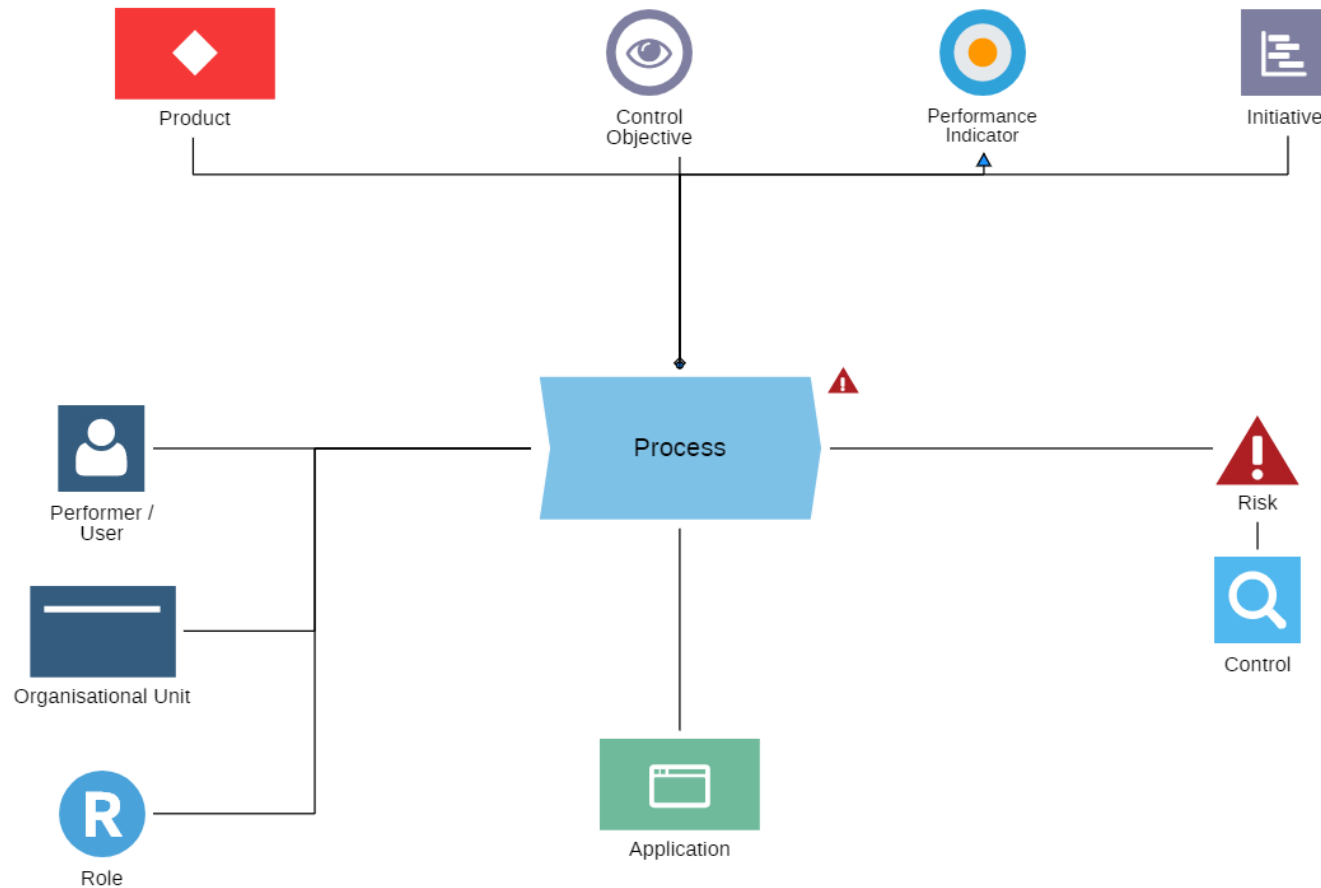
Process Management At Different Levels



Structured Process Management: From Rough To Fine

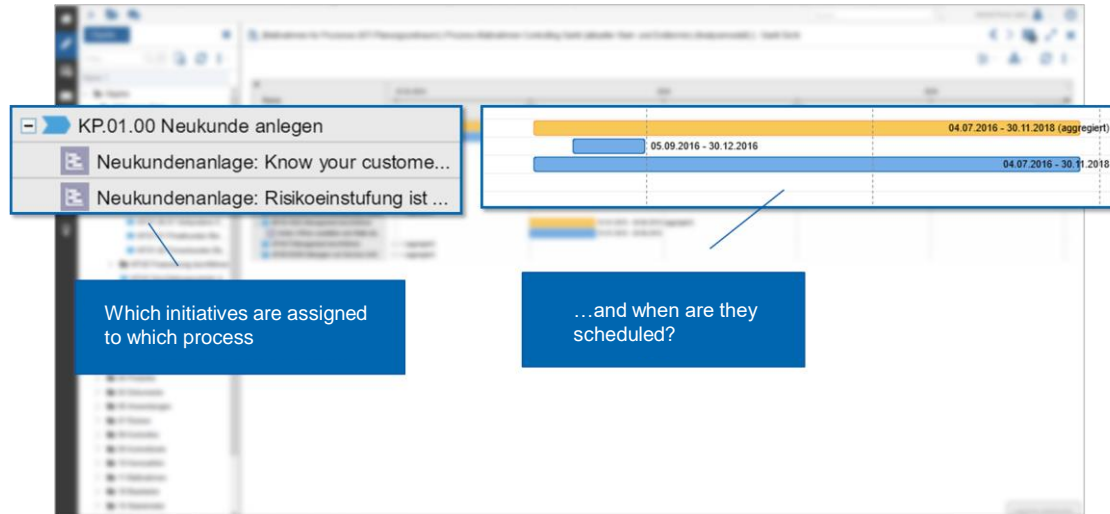
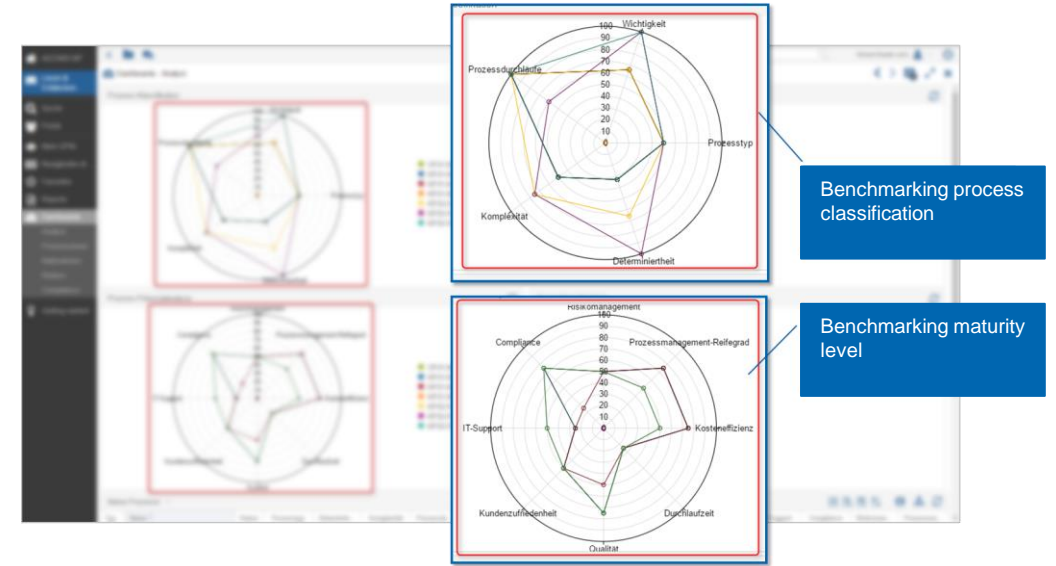
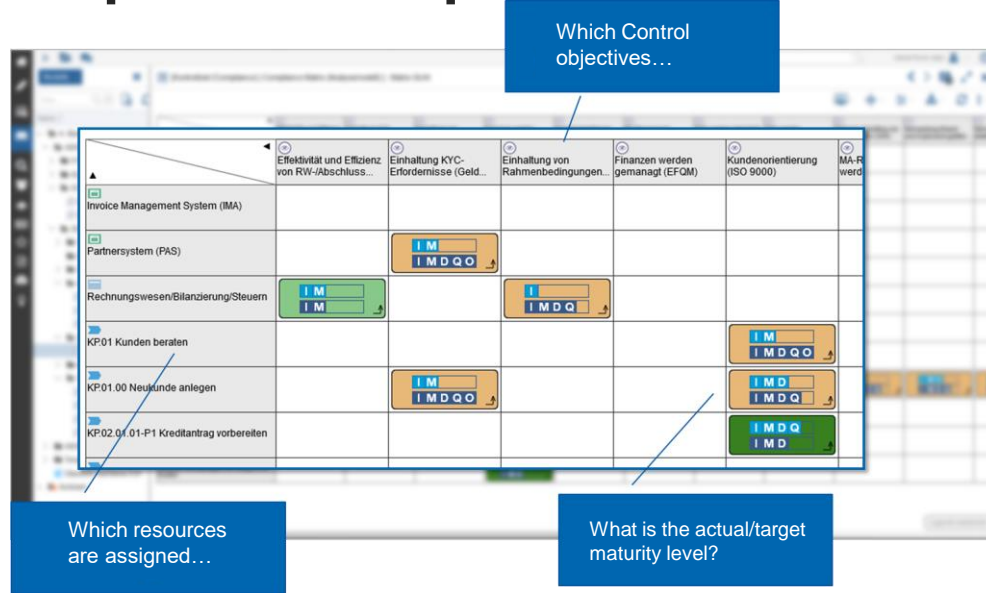


The process map: Management Information



- ▶ Relevant control information generally moves more to the level of the process map
- ▶ Stakeholder-specific reports and dashboards increasingly important
- ▶ The process description -modelling BPMN never loses its relevance!

The process map: Management Dashboard



Typ	Name ↑	Status	Offene Fra...	Gültig ab	Gültig bis
Geschäftsprozessdiagramm					
🔍	KP.01.00 Neukunde anlegen 1.00	✓	0	01.01.2016	31.12.2017
🔍	KP.01.00 Neukunde anlegen 1.01	📅	0
🔍	KP.01.00.01 Verbundene Kunden prü...	✓	0	01.01.2016	01.01.2017
🔍	KP.02.01 Kreditantrag erstellen Priv...	✓	0	01.01.2016	01.01.2017
🔍	KP.02.01 Kreditantrag erstellen Priv...	✓	0	01.04.2016	01.04.2017
🔍	KP.02.01.01 Kreditantrag vorbereiten...	✓	0	01.01.2016	01.01.2017
Prozesslandkarte					
🔍	KP.01 Kunden beraten 1.00	✓	0	01.09.2016	01.09.2017
🔍	KP.02 Finanzierung durchführen 1.00	✓	0	01.09.2016	01.09.2017

Validity information for processes

Current values of process characteristics

Typ	Name ↑	Status	Begrenzun...	IST-Wert	Soll-Wert
🔍	Anzahl abzulehnender Kundenanfragen	🟢	beidseitig	44	50
🔍	DLZ Neukundenanlage	🟡	von oben	32	30
🔍	Gesamt-DLZ Kreditantrag PK	🟢	von oben	22	24

Questions?

We are happy to answer all of your questions

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