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# Driving Transformation & Operational Excellence with a Digital Twin of an Organization (DTO)

**Global Business  
Impact Series**

Webinar



**Michael Schank**

Founder and Managing Director,  
Process Inventory Advisors

# Welcome!



**MICHAEL SCHANK**  
Founder & Managing Director  
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Partner Success Director  
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# Trends in Enterprise Transformation

Organizations are Struggling to Transform

70% of Transformations Fail



Enterprise AI Solution Investment is Accelerating

92% of companies plan to invest more into Gen AI... with up to 95% failure rate

# Michael Schank



- Over 25 years consulting and in the financial services industry
- Extensive transformation background
- Founder and Managing Director of Process Inventory Advisors



[www.ProcessInventory.com](http://www.ProcessInventory.com)

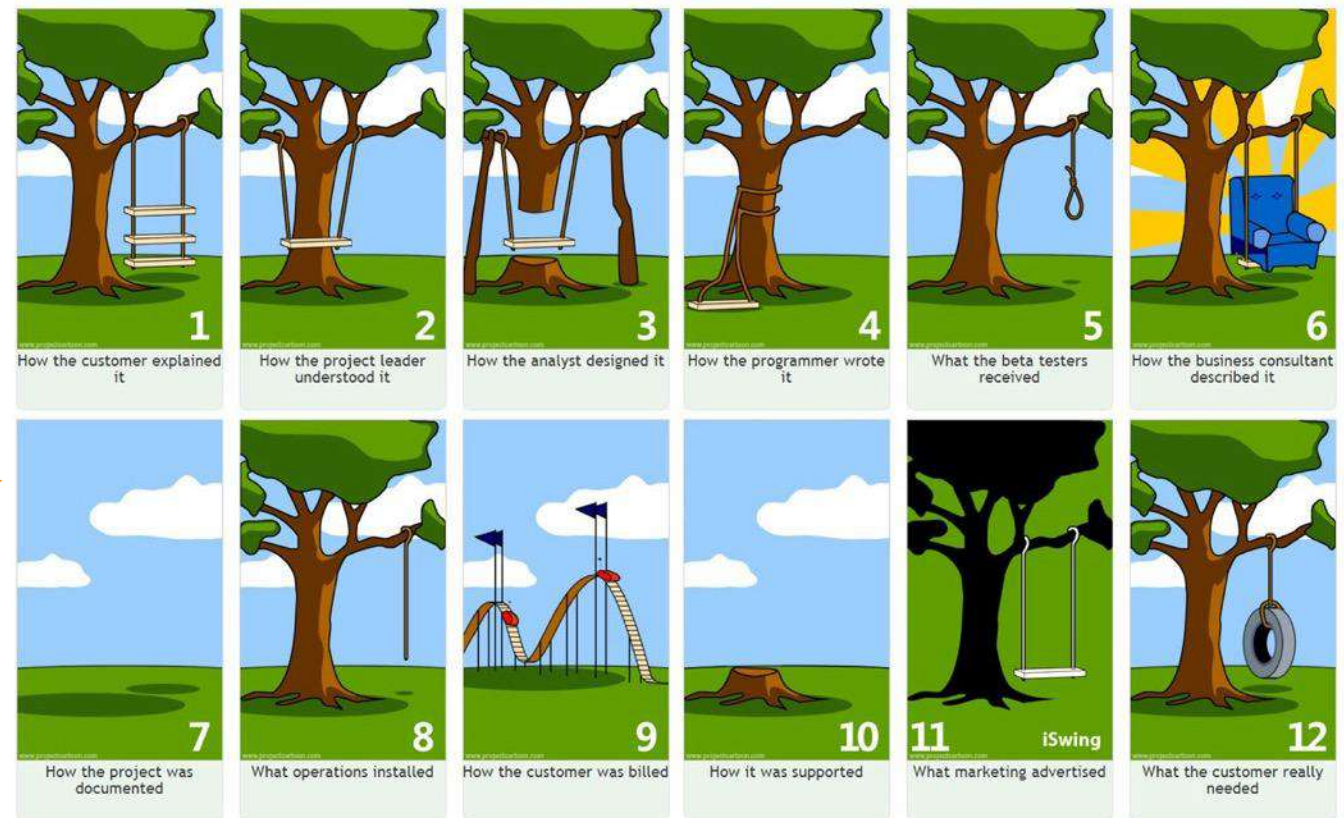
## Digital Transformation Success

The transformative power of the **Process Inventory Framework** to drive Digital Transformation success by aligning resources, organizational goals, and efforts, leading to unparalleled agility.



# Chaos is the Root Cause

- **Complex dominates** our people, process, and technology environments
- **Composed of diverse teams** that have unique languages and perspectives.
- **Our Silo's** hinders communication and collaboration



**Famous Tree Swing Cartoon**

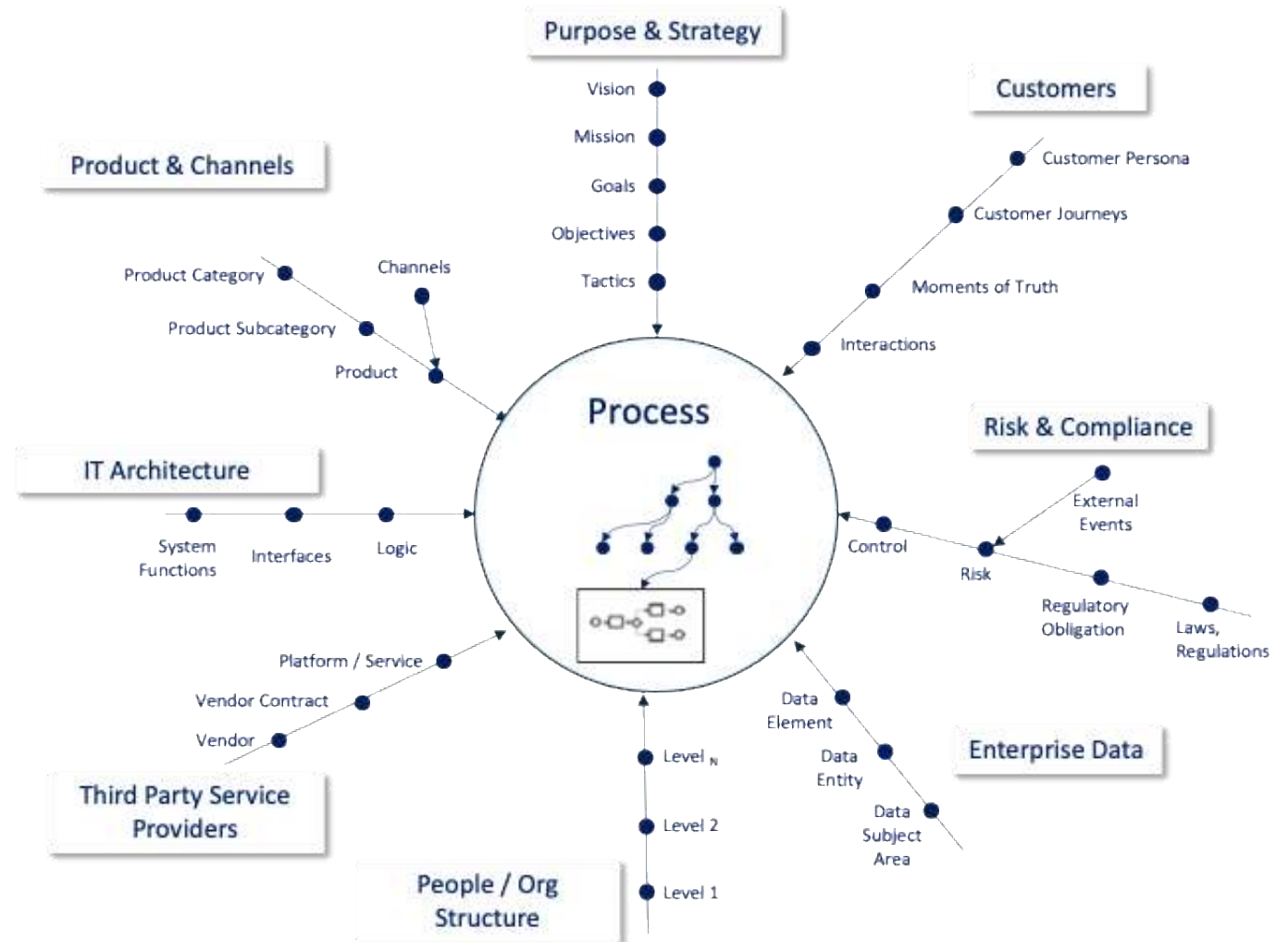
**Common thread** -> Lack of Quality Data about Our Organizations

# Systems Thinking Enables Transformation Success

Systems thinking views the organization through its connected parts and how they collectively impact performance

## Process is the ground truth

- ✓ Unlock all organizational knowledge
- ✓ Provide a common language to facilitate alignment
- ✓ Enables clear accountability
- ✓ Break organizational silos
- ✓ Enable Enterprise AI Value

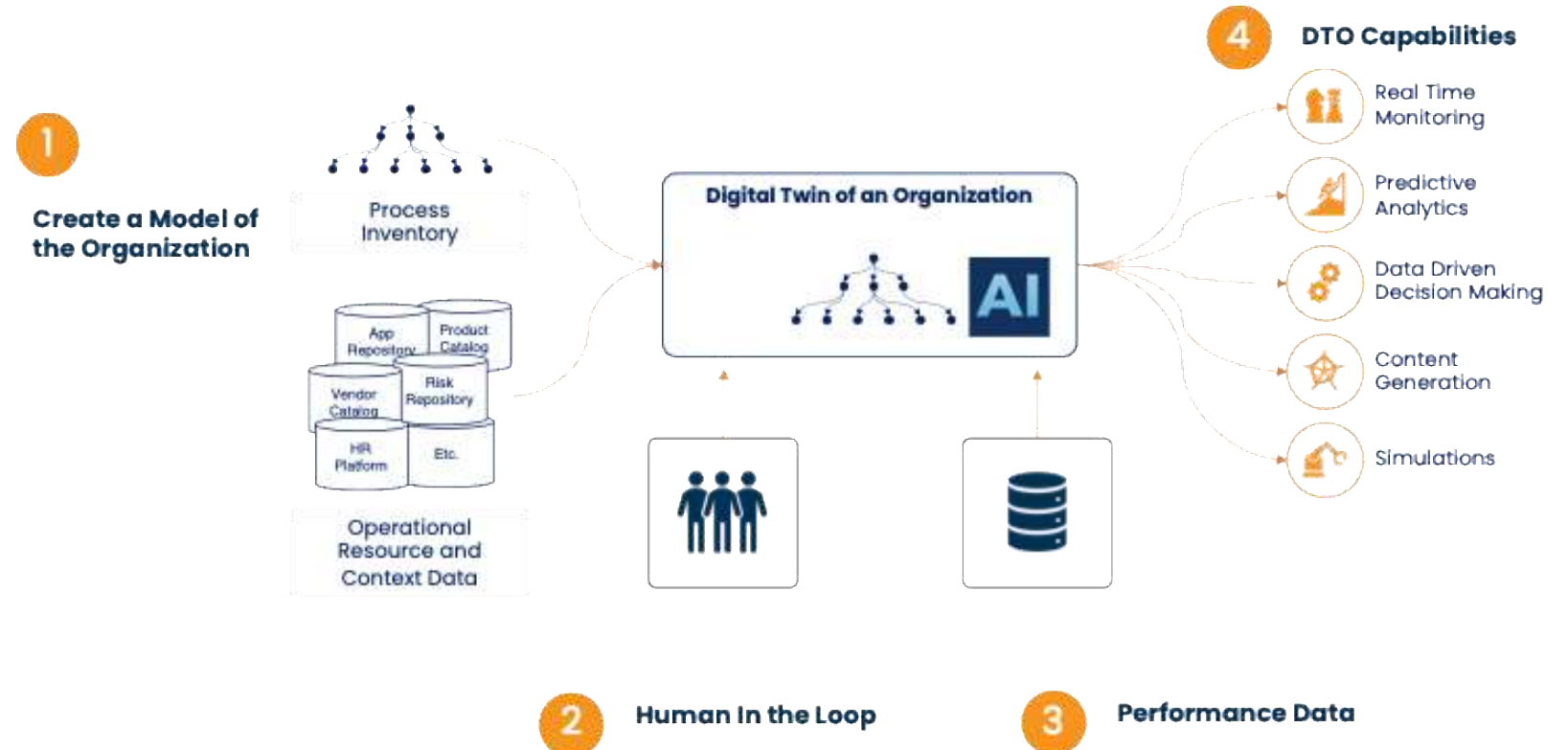


# Digital Twin of an Organization

A **Digital Twin of an Organization (DTO)** is a virtual representation of your business leverages AI insights to drive enterprise performance.

## Characteristics:

- Process as Semantic Core
- Comprehensive Representation
- Real Time Data Integration
- Human in the Loop Intelligence
- Customizes AI with Proprietary Data



# DTO Addresses All Transformation & Operational Excellence Needs



# Digital Twin of an Organization: From Chaos to Excellence

A Digital Twin of an Organization transforms critical use cases that frustrate organizations, turning fragmented operations into intelligent, high-performance outcomes.



## Transformation Management



## Operational Efficiency



## Risk and Compliance

### Status Quo

Transformations fail due to poor impact visibility and collaboration

Hidden waste, bottlenecks, and inefficiencies drain resources daily

Risks remain hidden until they materialize; compliance is reactive

### With Insight Twin

Success due to precise scoping and accountability

Transparent process view eliminates waste and optimizes performance in real time

Automated Risk Assessments, Clear Accountability, Precise Compliance Reporting

### Bottom Line

Up to **70%**  
lower transformation failure rate

Up to **50%**  
productivity gains

Reduce Risk Exposure by up to  
**30-50%**

# Data is King, but Context is it's Crown

Creating a DTO requires a mindset shift: Instead of just modeling processes, **model the organization through its processes** as the core semantic structure.

## Break processes down by organizational unit

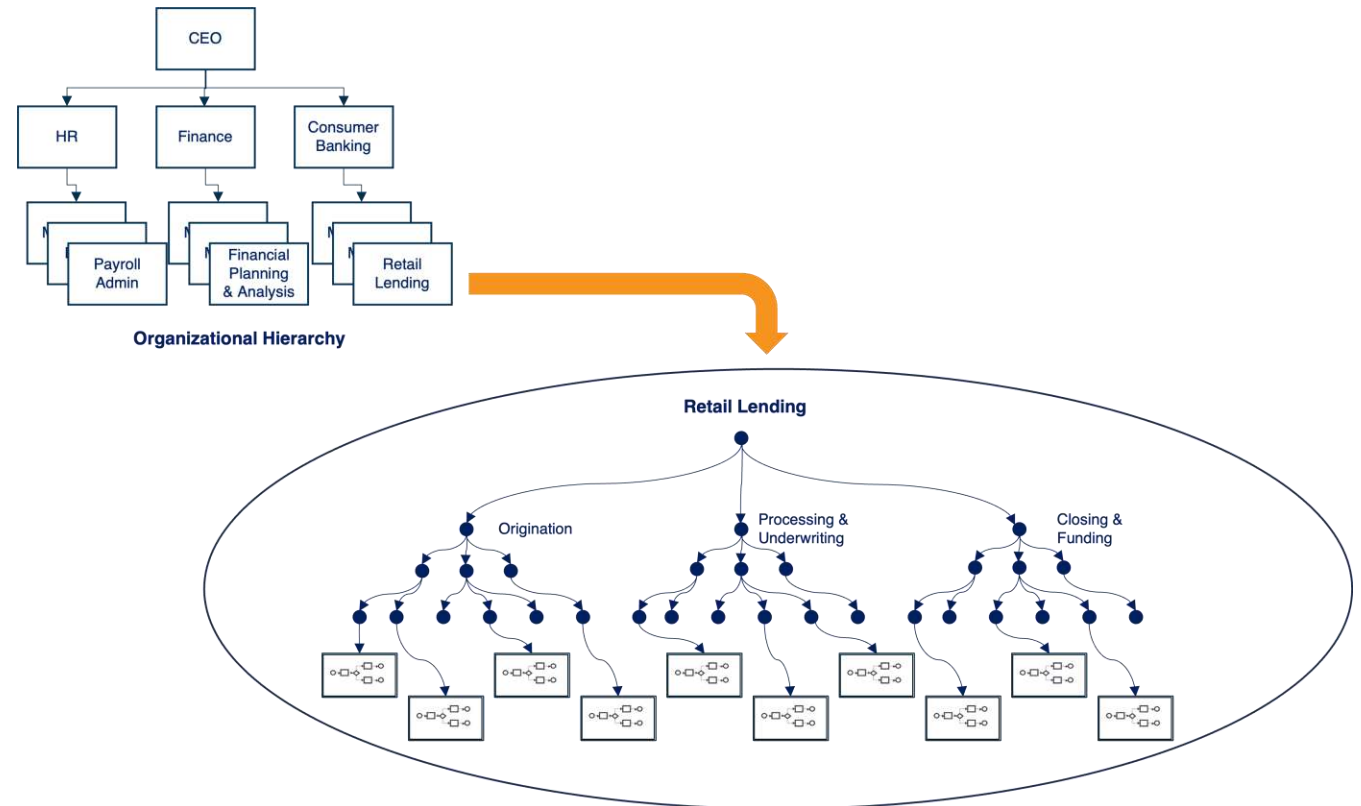
- Processes aren't abstract, they belong to specific teams, roles, and hierarchies for accurate context.

## Connect every process to the org hierarchy

- Insight Twin enforces this linkage — no orphaned processes, full traceability across the enterprise.

## Deliver transparency & comprehensiveness

- Achieve end-to-end visibility: who does what, where bottlenecks hide, and how changes ripple through the organization.



# Source of Truth Data Integration

## Enterprises rely on multiple disparate data stores

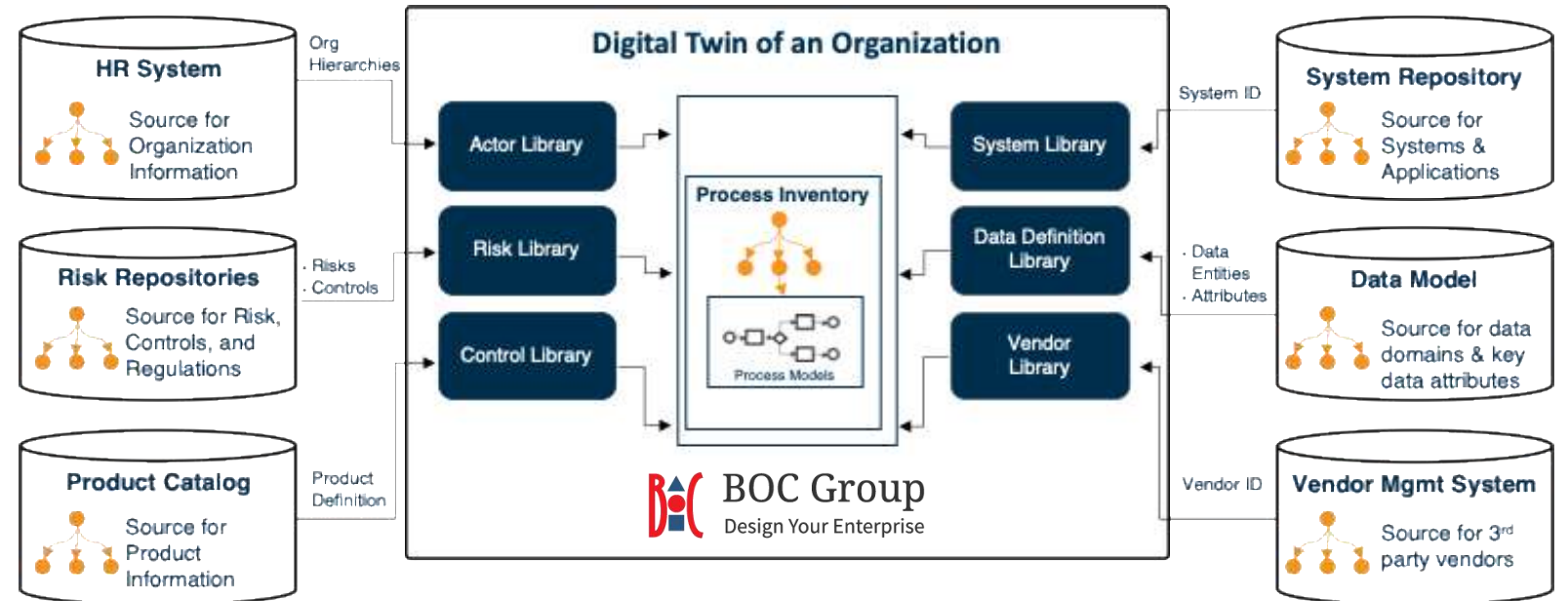
- to describe their full operating environment

## Silos fragment data

- making consistent analysis, alignment, and reliable AI grounding impossible.

## Insight Twin connects them to a single semantic layer

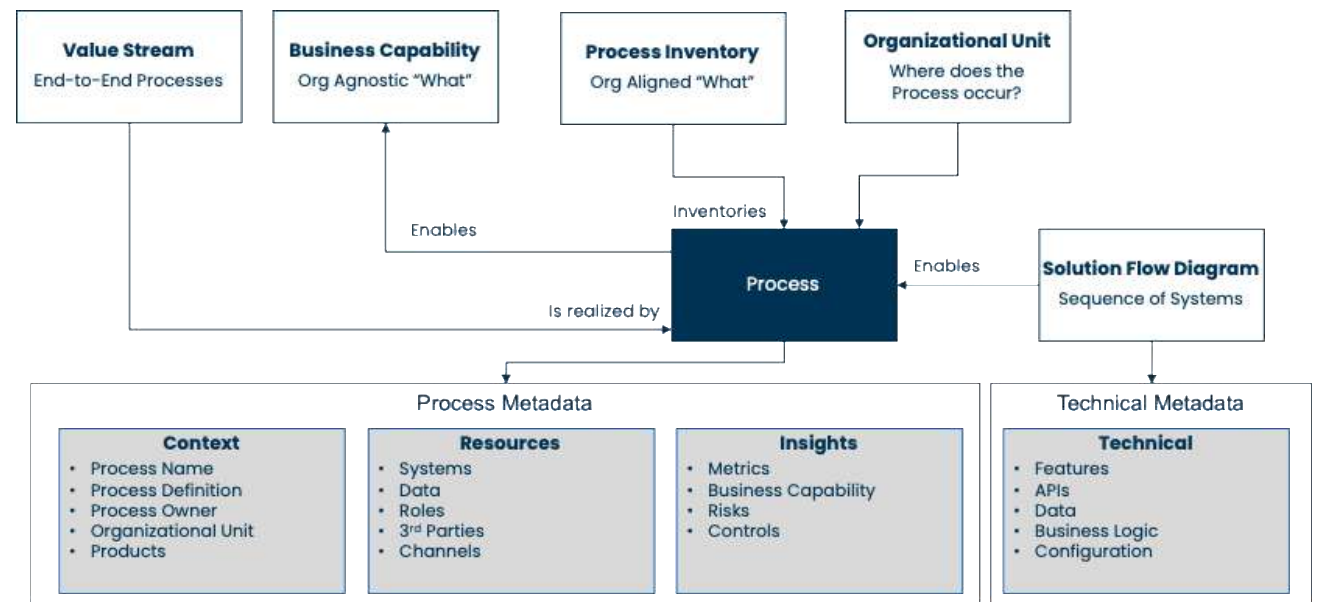
- creating a governed, real-time source of truth, enabling comprehensive visibility.



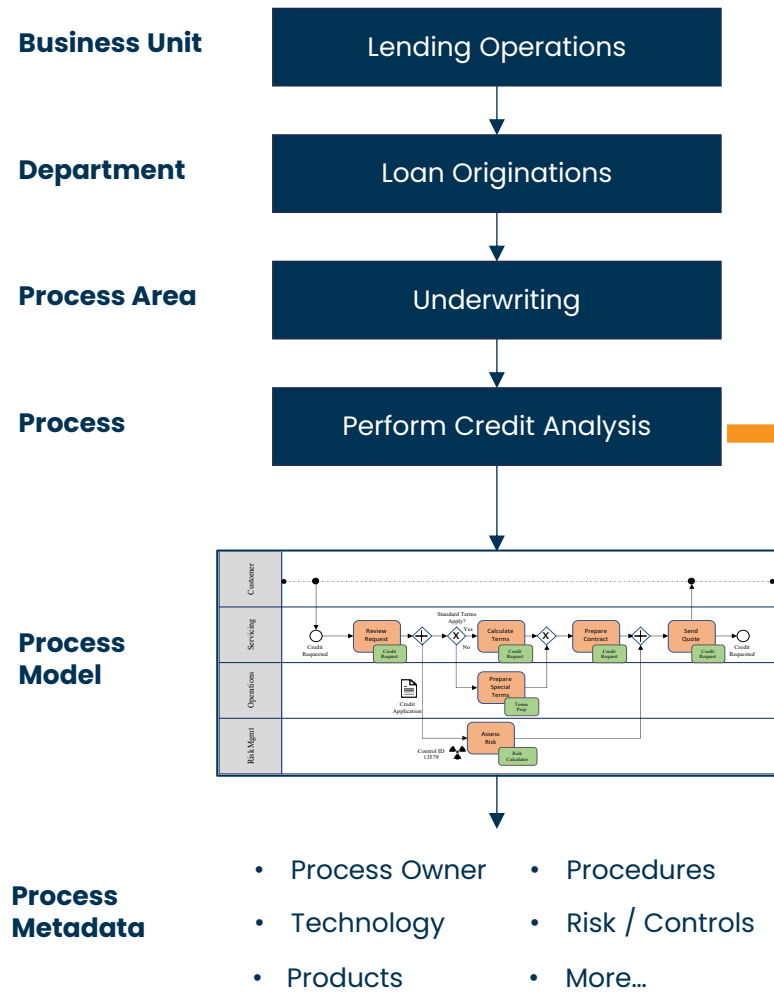
# Unified Model of Your Organization

## A comprehensive metamodel is needed to unified various perspectives

- Map Strategy through to Execution
- Apply Metrics Data to Make the Model Dynamic
- Connect multiple perspectives into a cohesive view



# Process Inventory Decomposition



**Sample Process Information**

**Process Owner**

- John Doe

**Regulatory Risk**

- Regulatory Obligations** – EEOC Reg B, Evaluate creditworthiness without discrimination based on protected classes
- Control** – Implement standardized credit evaluation process

**Technology**

- Platform** – Loan Origination System

**Key Metrics**

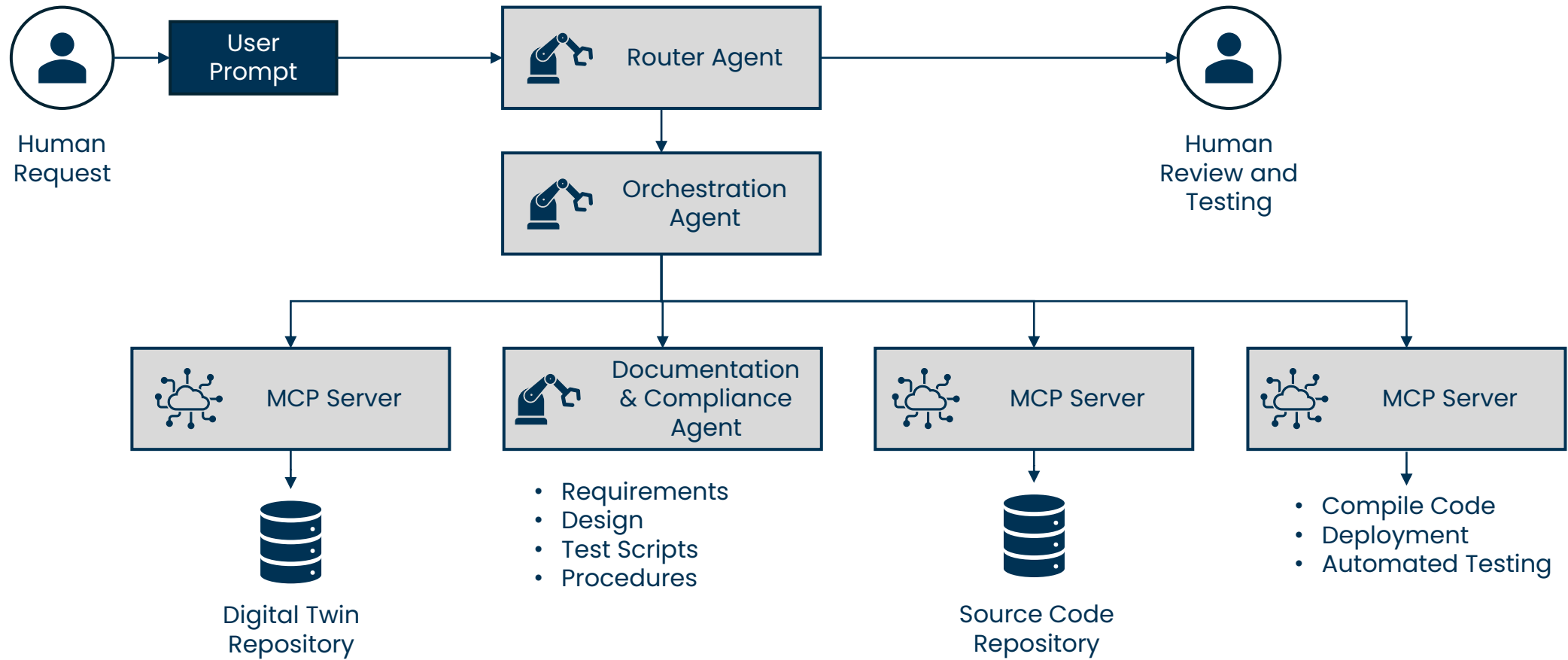
- Application to Approval Time (Cycle Time)
- Approval Rate
- Error Rate
- Member Satisfaction Score

**Opportunities**

- Provide digital first experience for seamless experience
- Increase automation to lower cost and increase quality

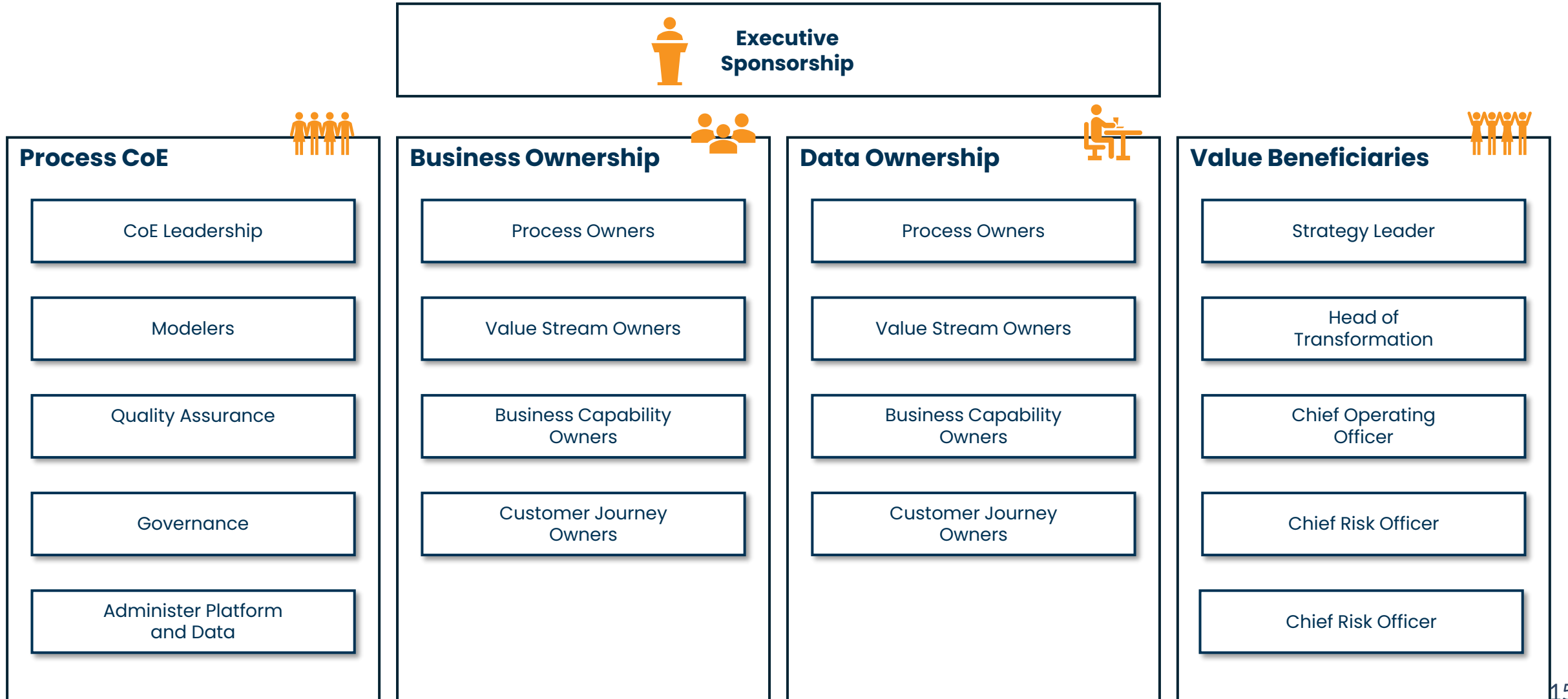
# DTO Support Agentic Workflow

## Agentic Workflow Example: Prompt to Code Deployment



# DTO Operating Model

Building and governing a DTO demands cross-functional alignment, the Process COE must lead the way.



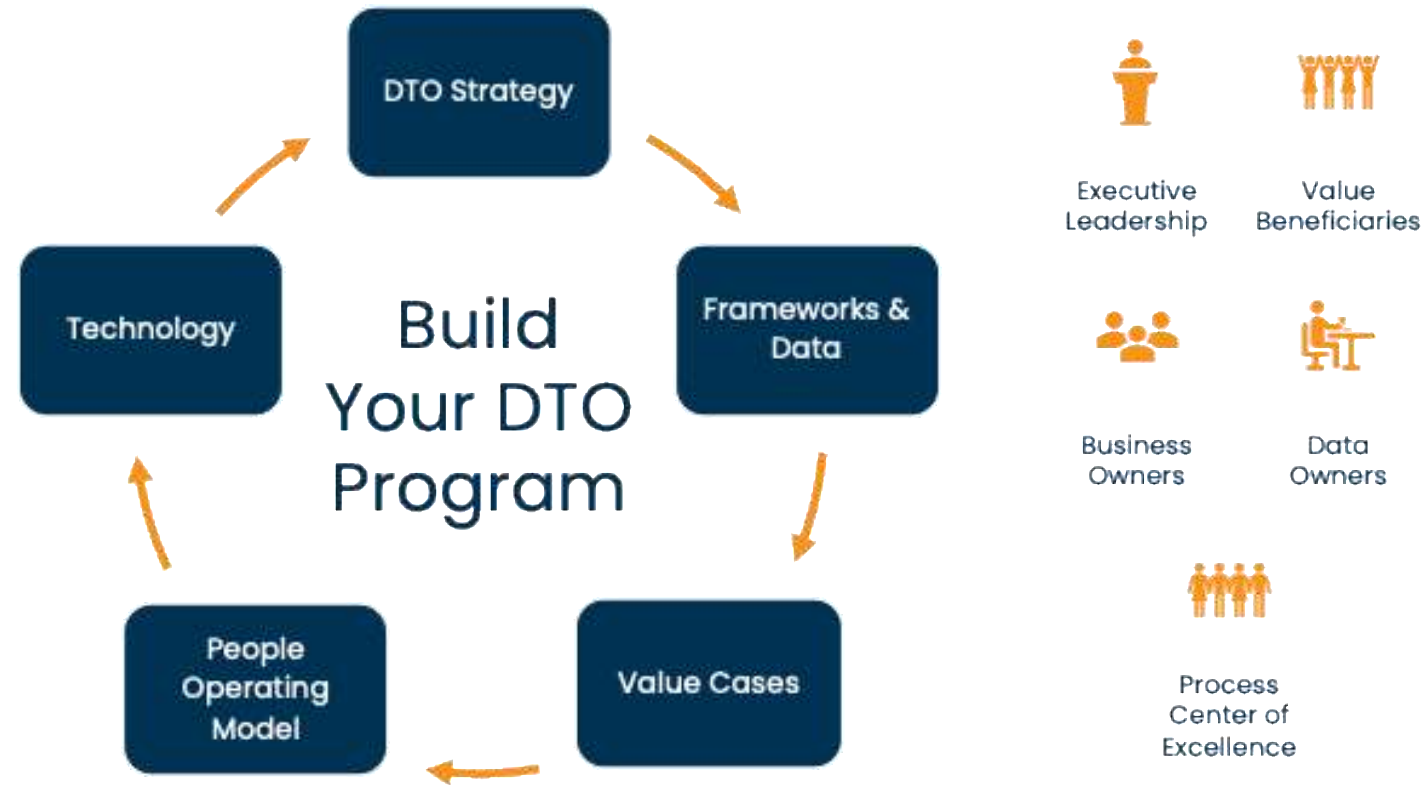
# Process Management Needs to Adapt



- Define & Drive Value
- Focus on Modeling Organization, not just Processes
- Don't use "Standard" Process Taxonomies
- Integrate Source of Truth Data
- Have Clear Quality Standards and Mandate
- Build Strong Governance

# DTO Playbook

The DTO Playbook: Your Blueprint for Scalable, Sustainable Success



# Questions?



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**KEEP IN TOUCH**  
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