

Process Transformation Planning & Analysis

Our Platform

Change the way you run your business forever. Create an agile, resilient, and continuously adaptable organization with the BusinessOptix Process Transformation Platform.

Whether you are looking to enhance end-to-end customer experiences, eliminate operational inefficiencies, manage risk, or create a digital twin, the BusinessOptix process transformation platform can help.

Use BusinessOptix to continuously adapt and improve

BusinessOptix takes you from a world full of silos, chaos, manual fixes, and poor performing operations into one where you are able to understand and continuously adapt and improve your business operations.

Using our mining, mapping, design, modeling, simulation, documentation, and planning capabilities, you can collaboratively improve your customer interactions, the way your employees work and the results your business achieves – all on a single platform that is rich in capabilities and easy to use.

Benefits of Process Transformation Planning, Modeling and Analysis

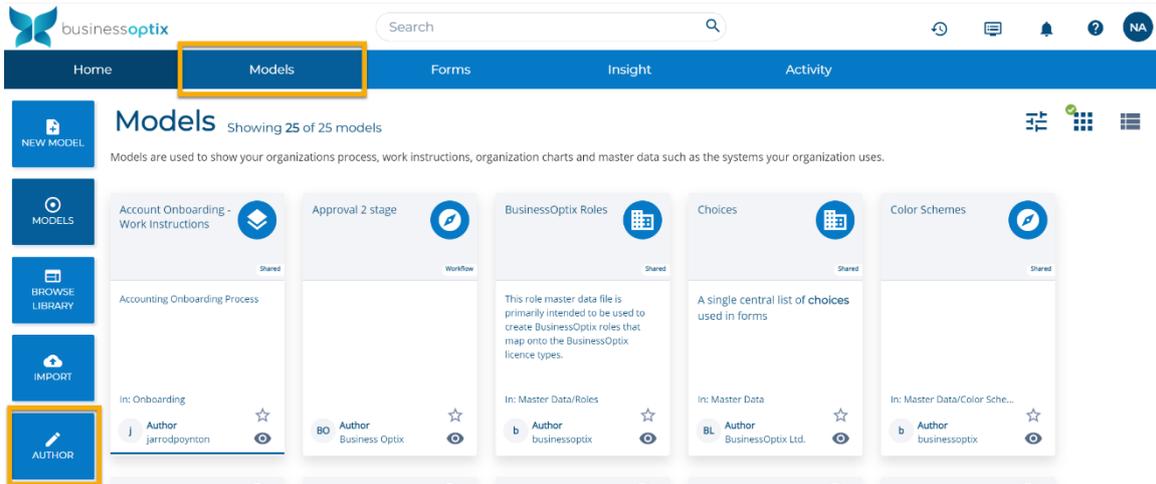
- More easily document a future state process from your current state process model.
 - Show process owners and other stakeholders the current, future and change state and quickly switch between them.
 - Capture high-level metrics on the costs and revenue associated with activities in the current state process model and how costs and revenue change in the future state.
 - Rapidly iterate and produce the information needed for your business case.
-

Process Transformation

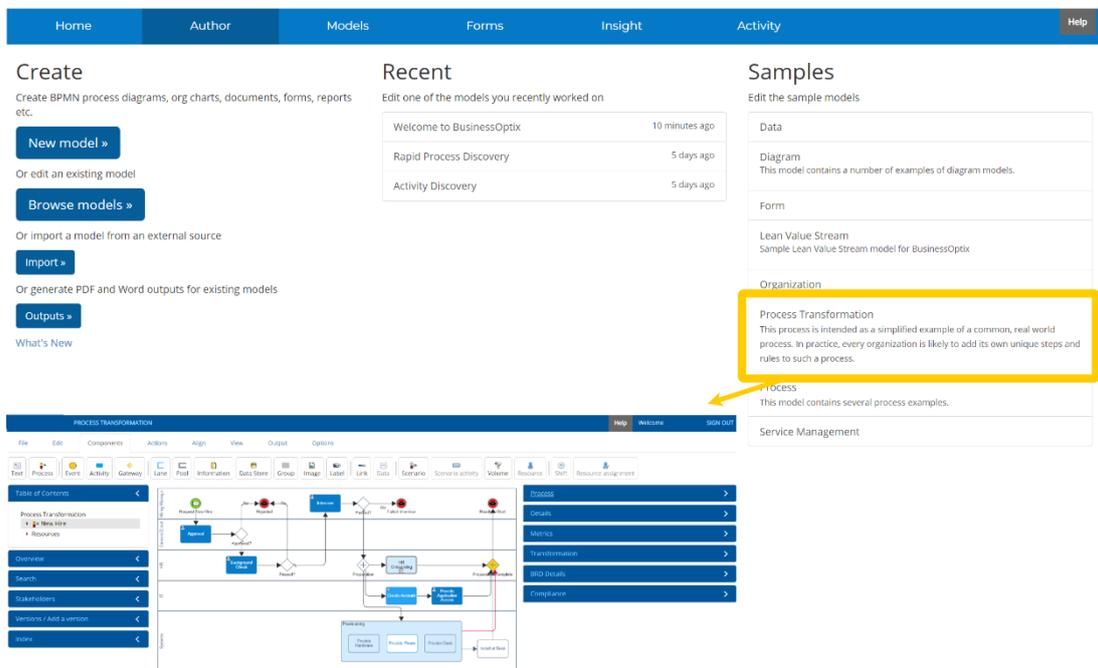
1. Getting started with Process Transformation

The following business process is a sample process that is used to demonstrate the features of process transformation available in the BusinessOptix application.

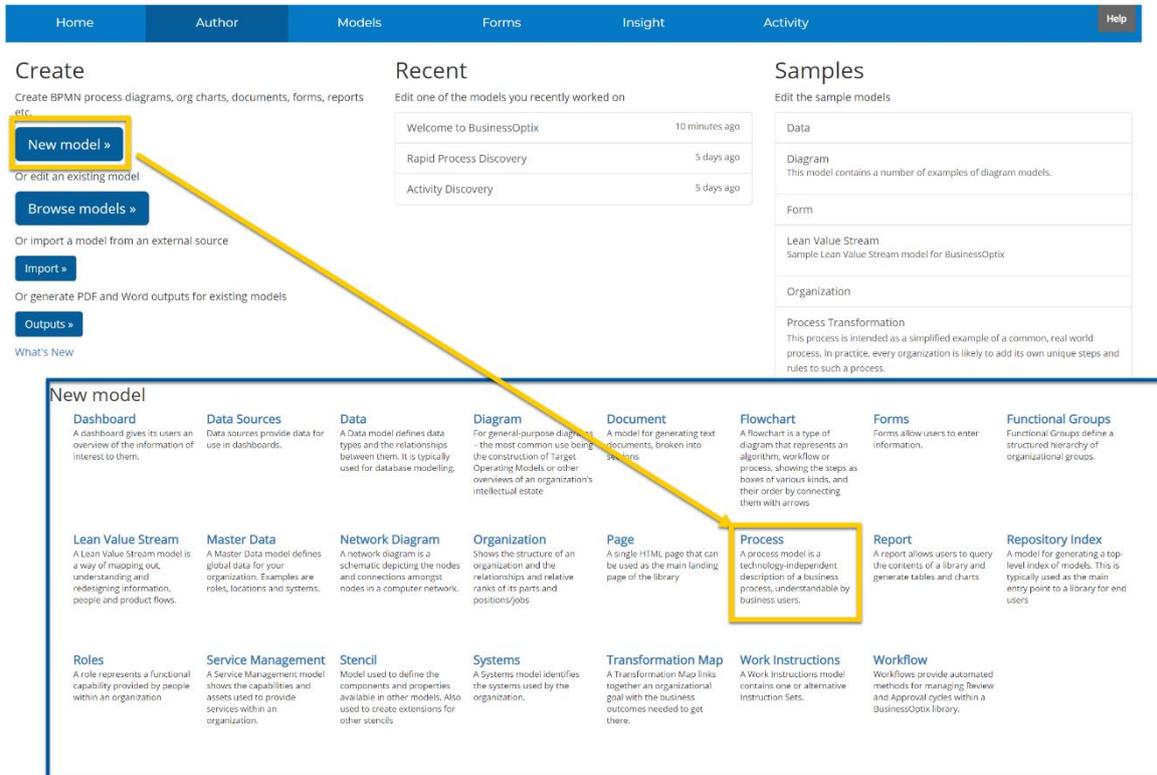
From the Home page navigate to Models (on the top menu). Click on the Author option on the left pane.



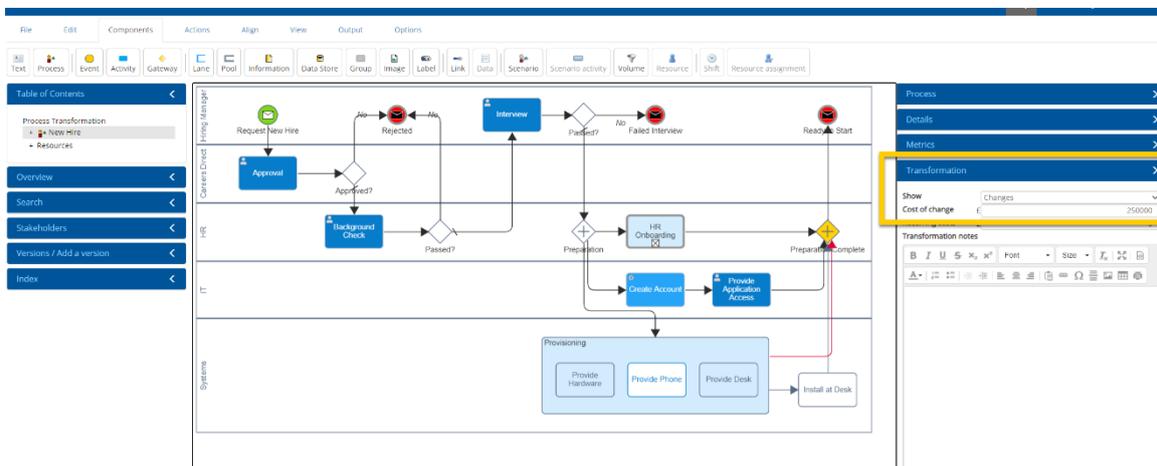
Choose Process Transformation option in Samples section on the right side. You will be moved to the process modeling module to observe transformation on the sample onboarding process flow.



Create a new process model or open an existing one and perform your own transformation exercise by clicking New model from the Model - Author menu.



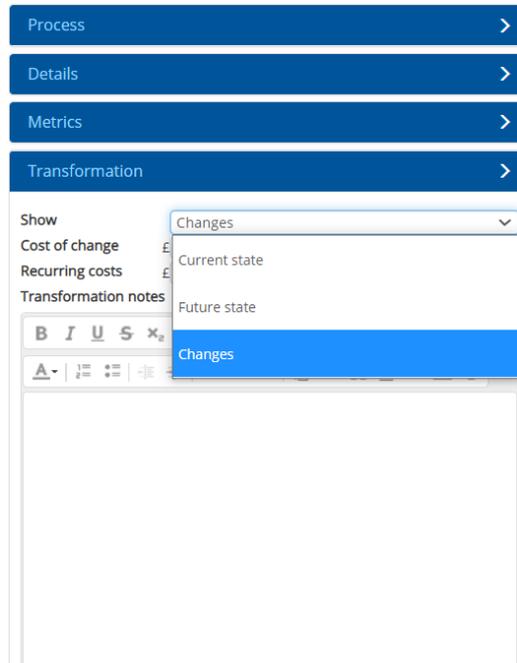
When the process model is initially opened, it shows the Change state view of the process.



In this view, BusinessOptix uses color shading to indicate whether in the future state process model the activity is being kept, modified, dropped, or added.

It is easy to switch between Changes view and either the Current state or Future state – go to the Properties Inspector pane (on the right-hand side) and then from the Transformation tab select Current state, Future state, or Changes.

NOTE: To switch views of the process, make sure you have the Process selected in the Table of Contents and not a singular component.



2. Adding metrics to current state process model

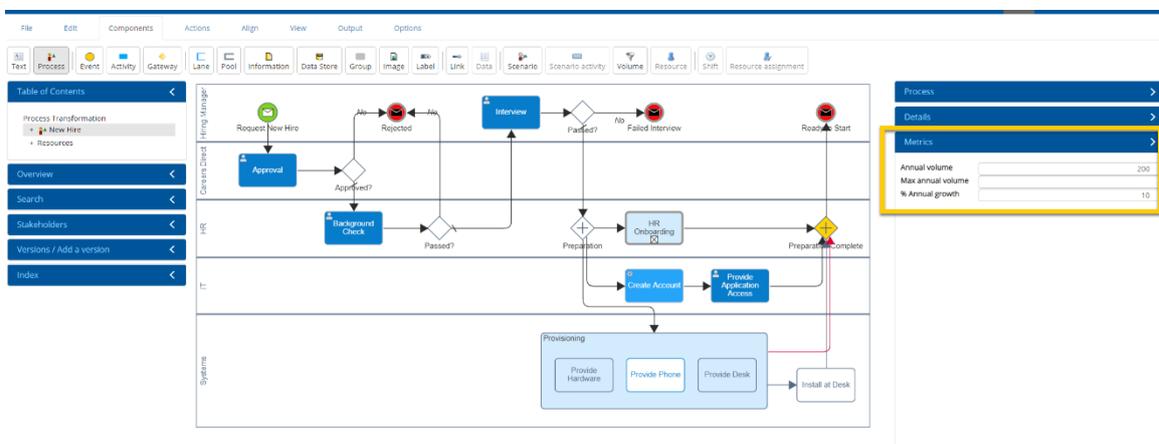
NOTE: Incomplete metrics may result in incorrect output calculations.

Metrics for entire process model

To calculate the benefits or /and costs of the process transformation, authors need to provide input regarding the amount of work per year for the whole process.

Select the process and in the Metrics tab complete:

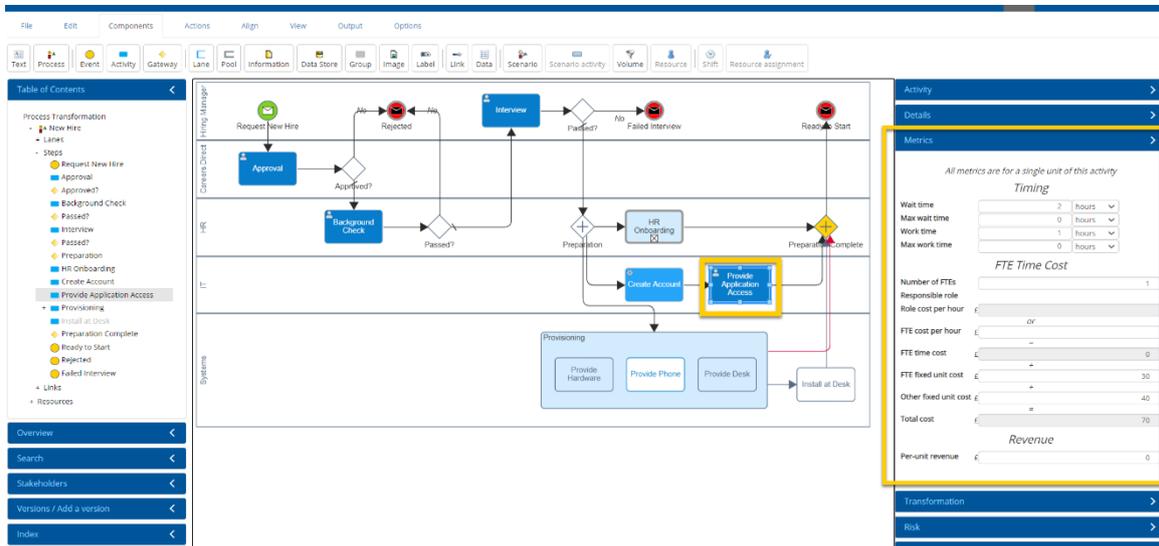
- Annual Volume – the number of process instances occurring on average per annum.
- Maximum Annual Volume – this metric is only required if you are also using BusinessOptix Process Scenarios.
- Percentage Annual Growth – what change in work volume is expected year on year. Enter a negative percentage if the process volume is anticipated to decrease.



NOTE: BusinessOptix Transformation is not a simulation and does not consider whether resources are available to complete the activity. Refer to [Process Scenarios and Simulation](#).

Activity Metrics (for each activity component)

Click on an activity in the diagram and go to Metrics on the right-hand side to check the available options.



For each activity, there is an option to record a variety of time metrics such as seconds, minutes, hours, days, months, or years. The metrics include:

- **Wait Time** – typical waiting time before the selected activity can be started
- **Max Wait Time** – the maximum wait time before the selected activity can be started
- **Work Time** – the typical amount of time to carry out the activity
- **Max Work Time** – the maximum amount of time allowed to carry out the activity

NOTE: Incomplete metrics may result in incorrect output calculations.

The financial metrics in BusinessOptix include:

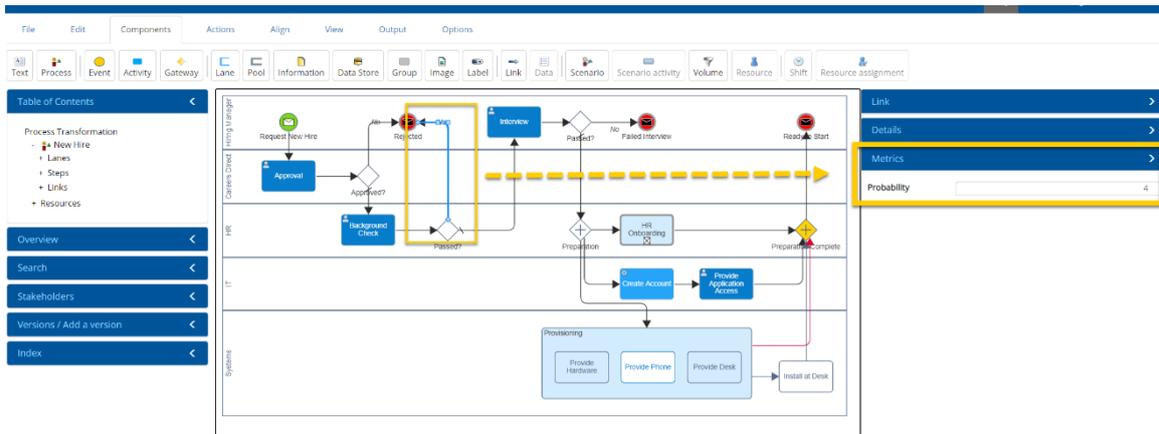
- **Number of FTE** – this refers to how many FTE (Full-Time Employees) are required to complete a single instance of the activity. For example, to provide an approval in the process usually one FTE is needed, a delivery that requires two people to move the good would be 2 FTEs, moving a patient in a hospital could be more.
- **Responsible Role** – to set a responsible role use the option under Details property. In case of a need of more than 1 FTE and they are different roles need to be used under Process Scenarios.
- **Role cost per hour** – this is the hourly cost set in Master Data for the role.
- **FTE cost per hour** – In case the role or role cost is not set up in Master Data or if there is a need to override the cost per hour then enter the cost here.
- **FTE time cost** – the calculated costs of performing this activity in mean working time.
- **FTE fixed unit cost** – along with time-based costs there is a cost per activity instance associated with the FTE. For example, this activity includes a fixed call-out fee of \$100 plus the time related costs.

- Other fixed unit costs – for capturing non-FTE costs associated with each activity instance. For example, postage, packing, delivery, printing.
- Per Unit Revenue – if by completing this activity there is any need to collect some revenue then enter it here.

Gateway Probability

When there is a gateway with alternative paths, there is an option to indicate the probability of the process following each of the paths. Enter the probability percentage with a value between 0 and 100 on the links coming from the gateway.

NOTE: Probability must equal 100% for each gateway for accuracy of modeling. Do not enter a probability on the last path as BusinessOptix will calculate the remainder.

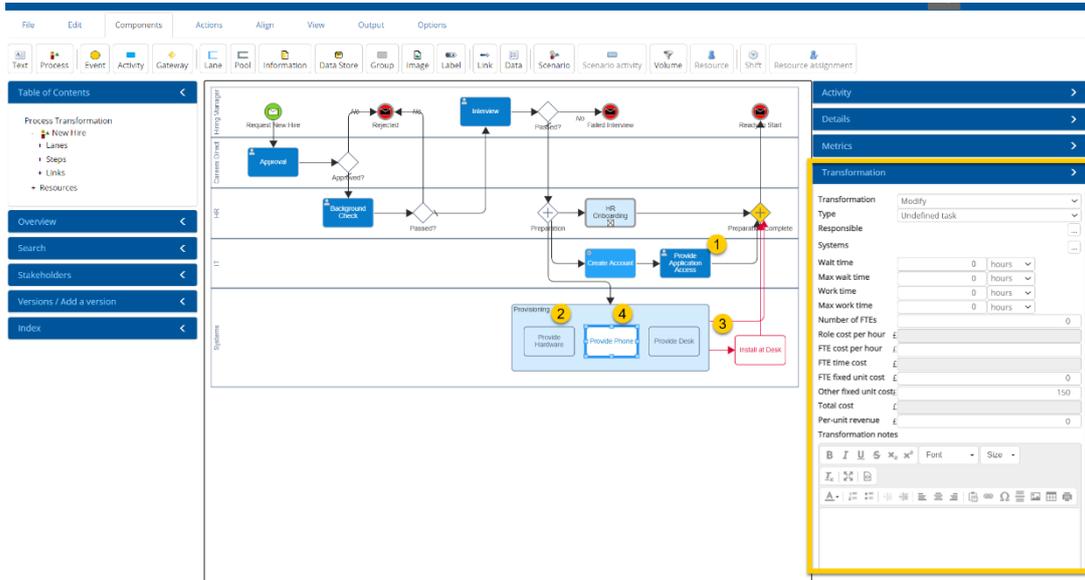


3. Documenting future state process model

In the Future state business process, decisions are made about which activities are staying the same, being modified or are no longer required.

Changing a Process Activity

For any process activity that is being changed in the Future state, select the activity and on the transformation tab select the appropriate transformation:



- (1) Keep – *no color change* – this activity remains unchanged in the future process state.
- (2) Drop – *grey* – this activity is no longer required in the future process state. There is an option of entering some free text information on why this activity is no longer required.
- (3) Add – *red* – if there is a new activity then it should be marked as an Add. For new activities, do not enter any current state metrics, but enter future state details.
- (4) Modify – *blue* – when making changes in the activity select this option. Enter only the attributes that are changing.

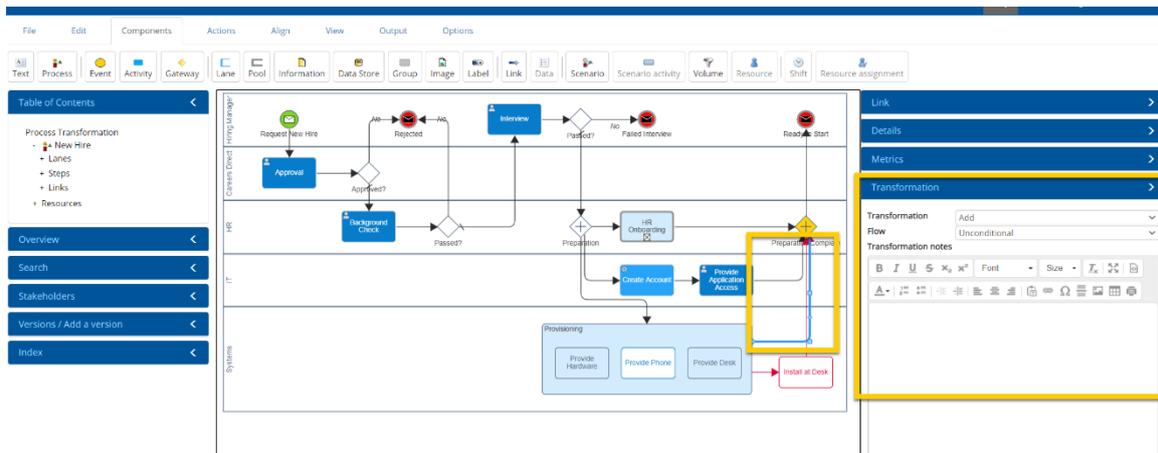
While adding or modifying the activity in the future state, enter details on what is being changed. An activity in the future process state can be modified by for example:

- Activity Type
- Systems used
- Wait Time
- Maximum Wait Time
- Work Time
- Maximum Work Time
- FTE Count
- FTE Cost

- Per Unit Cost
- Per Unit Revenue

Changing a Gateway

In the same way that activities are changeable in a process transformation, edit the paths from a gateway by keeping them unchanged, dropping them if they are no longer relevant, adding them if they are new or modifying them if there is a change.



In the case of Modify or Add, enter the probability of the process following this path (as describes gateway probability above.)

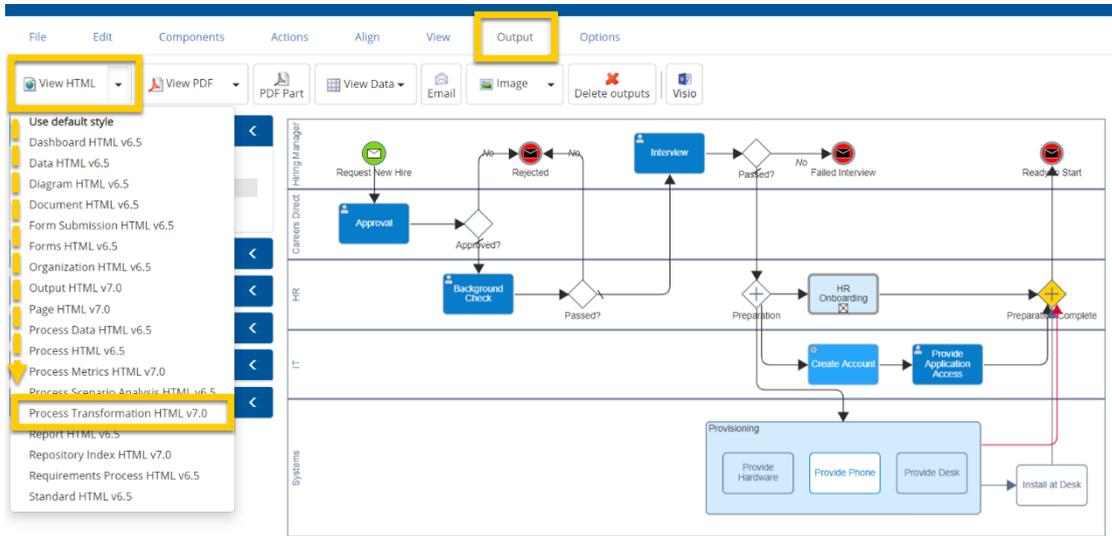
Cost of Change

The final piece of financial information to enter is the cost of carrying out the change. Select the Process in the Table of Contents then select the Transformation tab and enter both the cost of change and any recurring annual costs associated with the change.

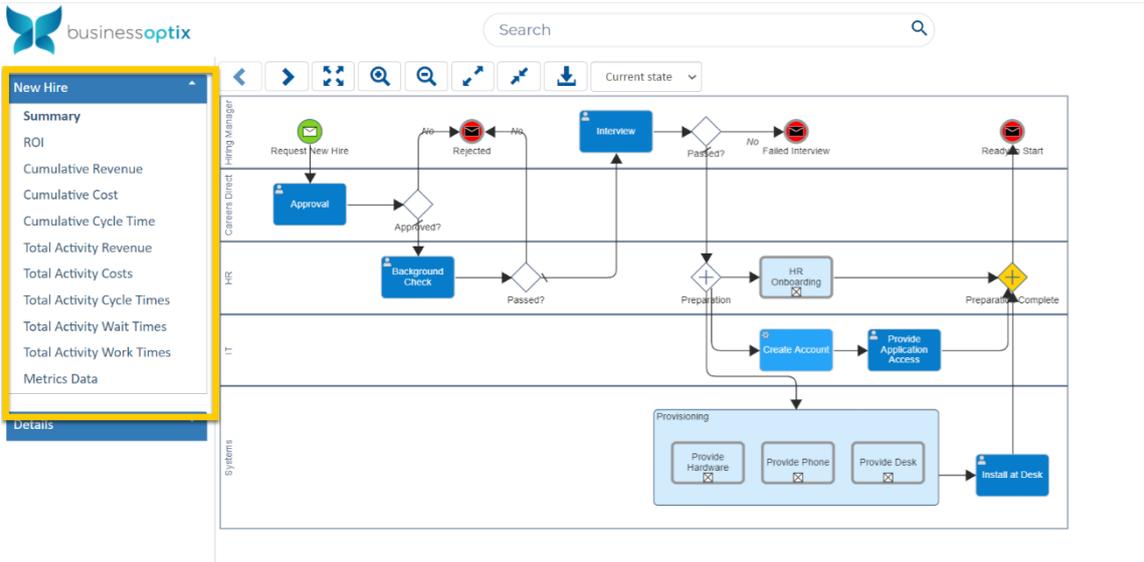
Transformation	
Show	Changes
Cost of change	£ 250000
Recurring costs	£ 0

4. Business case for Process Transformation

Once all the necessary columns / parameters are filled on the transformation front, to view the transformation output, choose Output > View HTML > Process Transformation HTML v7.0 option.

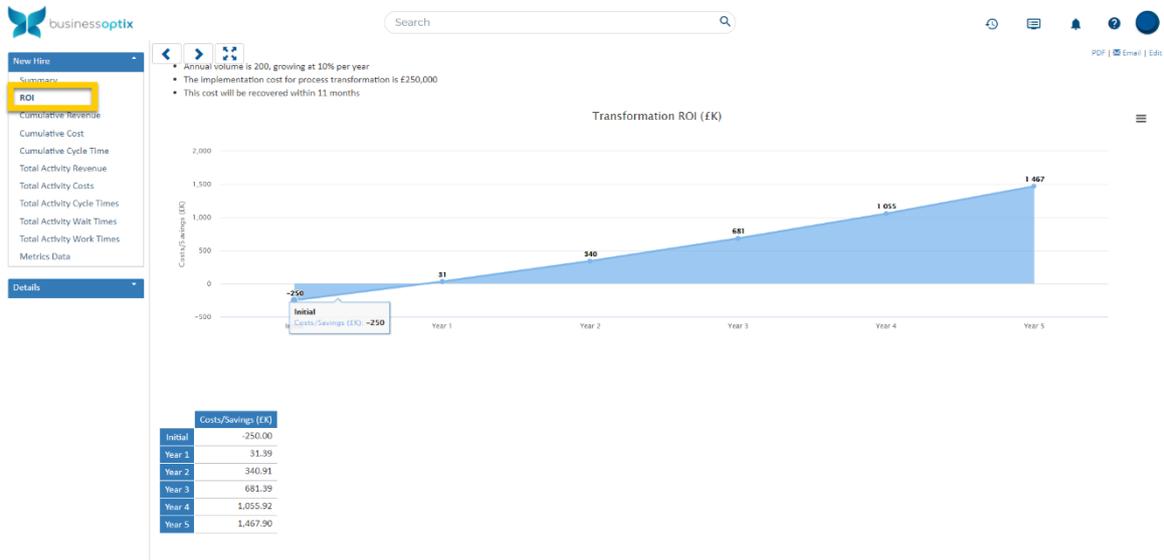


Upon clicking, a new page opens with the transformation output. The business process metrics can be presented on the charts for current and future state – click the required metric from the menu on the left to display details.



Return on Investment

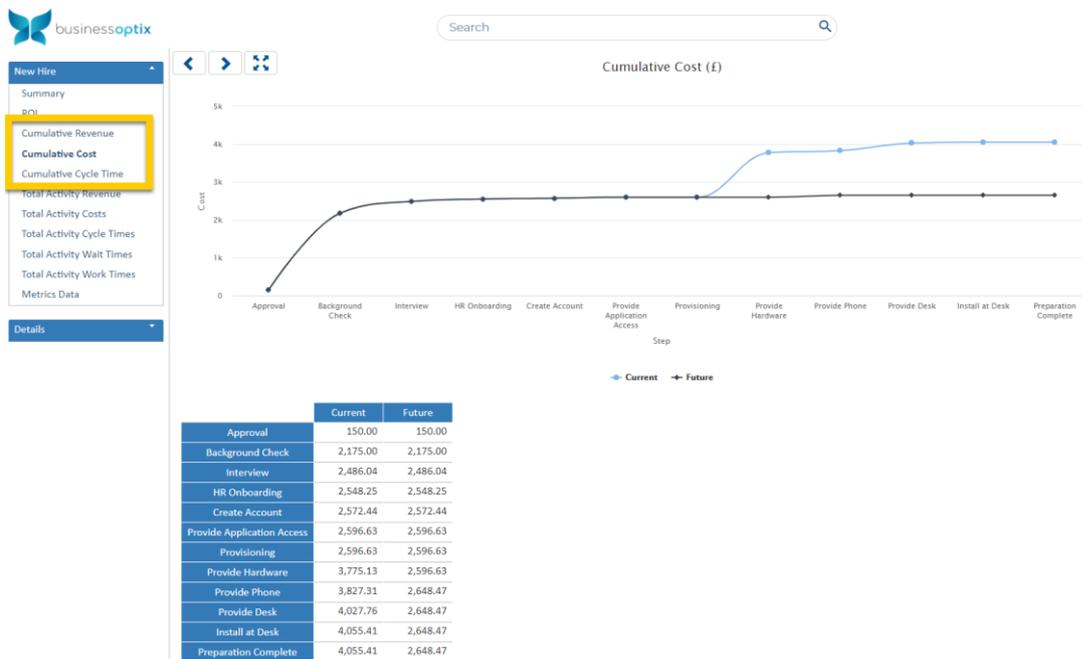
With the help of ROI, we can easily find out whether the proposed process transformation is going to be financially beneficial.



NOTE: In case the graph is going down, it does not always mean that there is no financial gain. It would be good to re-check on the steps & metrics added and make changes as needed.

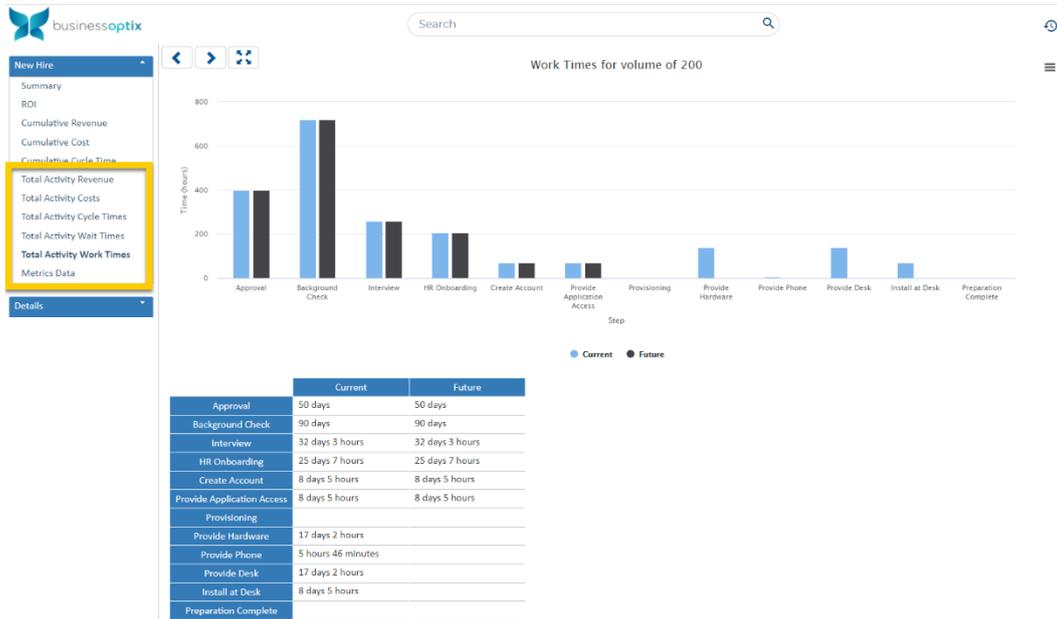
Cumulative Revenue / Costs / Cycle Time

The process transformation output provides an easy way to visualize how the revenue, costs and cycle times change through the business process.



Activity Revenue / Costs / Cycle Time / Wait Time / Work Time

For each of the activities in the business process the revenue, costs, cycle time, wait time or work time will be calculated to help understand how it has changed between the current state and future state.



Metrics Data

Under Metrics Data, BusinessOptix provides tables of all of the data about the current and future state process transformation. The tables either represent all the processes for a year or an average process. Example: Metrics per activity per item processed (current).

The figure shows a dashboard for 'New Hire' with a search bar and navigation icons. The main table is titled 'Metrics per activity per item processed (current)'. It has columns for Activity, Wait time, Work time, Cumulative work time, Cumulative cycle time, Total cost (£), Revenue (£), Cumulative cost (£), Cumulative revenue (£), Cumulative profit (£), Full time employees, and Probability. Below this is another table titled 'Metrics per activity per volume of 200 (current)' with columns for Activity, Work time, Cumulative work time, Cumulative cycle time, Total cost (£), Revenue (£), Cumulative cost (£), Cumulative revenue (£), and Cumulative profit (£).

Activity	Wait time	Work time	Cumulative work time	Cumulative cycle time	Total cost (£)	Revenue (£)	Cumulative cost (£)	Cumulative revenue (£)	Cumulative profit (£)	Full time employees	Probability
Approval	1 day	2 hours	2 hours	1 day 2 hours	150.00		150.00		-150.00	1	100
Background Check	1 day 6 hours	3 hours 36 minutes	5 hours 36 minutes	3 days 4 hours	2,025.00		2,175.00		-2,175.00	1	90
Interview	4 days 3 hours	1 hour 18 minutes	6 hours 54 minutes	8 days	311.04		2,486.04		-2,486.04	1	86
HR Onboarding	1 day	1 hour 2 minutes	7 hours 56 minutes	9 days 1 hour	62.21		2,548.25		-2,548.25	1	35
Create Account	41 minutes 28 seconds	20 minutes 44 seconds	1 day	9 days 2 hours	24.19		2,572.44		-2,572.44	1	35
Provide Application Access	41 minutes 28 seconds	20 minutes 44 seconds	1 day 1 hour	9 days 3 hours	24.19		2,596.63		-2,596.63	1	35
Provisioning											
Provide Hardware	1 day 6 hours	41 minutes 28 seconds	1 day 1 hour	11 days 2 hours	1,178.50		3,775.13		-3,775.13	1	35
Provide Phone	3 days 4 hours	1 minute 44 seconds	1 day 1 hour	14 days 5 hours	52.19		3,827.31		-3,827.31	1	35
Provide Desk	1 day 6 hours	41 minutes 28 seconds	1 day 2 hours	16 days 4 hours	200.45		4,027.76		-4,027.76	1	35
Install at Desk	1 day	20 minutes 44 seconds	1 day 2 hours	17 days 5 hours	27.65		4,055.41		-4,055.41	1	35
Preparation Complete	2 hours 46 minutes		1 day 2 hours	17 days 7 hours			4,055.41		-4,055.41		35

Activity	Work time	Cumulative work time	Cumulative cycle time	Total cost (£)	Revenue (£)	Cumulative cost (£)	Cumulative revenue (£)	Cumulative profit (£)
Approval	50 days	50 days	250 days	30,000		30,000		-30,000
Background Check	90 days	140 days	700 days	405,000		435,000		-435,000
Interview	32 days 3 hours	172 days	1,596 days	62,208		497,208		-497,208
HR Onboarding	25 days 7 hours	198 days	1,830 days	12,442		509,650		-509,650
Create Account	8 days 5 hours	207 days	1,856 days	4,838		514,488		-514,488
Provide Application Access	8 days 5 hours	216 days	1,882 days	4,838		519,326		-519,326
Provisioning								
Provide Hardware	17 days 2 hours	233 days	2,244 days	235,699		755,026		-755,026
Provide Phone	5 hours 46 minutes	234 days	2,936 days	10,437		765,463		-765,463
Provide Desk	17 days 2 hours	251 days	3,299 days	40,090		805,552		-805,552
Install at Desk	8 days 5 hours	260 days	3,515 days	5,530		811,082		-811,082
Preparation Complete		260 days	3,584 days			811,082		-811,082

NOTE: When reading the timings for an average process that is after a gateway, the activity time will not be the same as entered in the process model. This is because we are reflecting the average across all process instances and if only 60% of process instances follow this path then the activity time will be 60% of the work time entered on the activity metrics.

Transformation Planning and Analysis

1. Transformation Map

A Transformation Map is a one-page visual depiction of the plan for implementing a strategy or goal. The map should describe the major results, actions and milestones required to achieve the strategic goal, along with the expected timing of each of them. It is a presentational tool to build alignment between project and leadership teams. It is used to convey measurable steps or individual outcomes behind a project plan to remove the conjecture and create an achievable timeline of strategy to goal.

Objectives of a Transformation Map

Transformation maps are best created with a group to build consensus. The process of developing the transformation map with the appropriate stakeholders is as important as the map itself.

Presenting a finished map without significant stakeholder input and involvement will not have nearly the same level of ownership or understanding, and therefore may not achieve the same results. It is important that everyone on a project team shares the same strategies and believes in the same goal.

A transformation map will outline a strategy plan in an easily understood format to keep everyone focused on the final goal. By tracking results of individual outcomes, it can be used to guide future actions and priorities.

The transformation map allows to set attributes at a macro level that everyone can follow and understand. BusinessOptix helps create relevancy by linking into artefacts not only within the library but externally so if a user were viewing this map, that user could click hyperlinks and drilldowns to understand the context of the objectives.

Purpose of a Transformation Map

Transformation maps are predominantly used during the below scenarios:

- To agree and communicate multiple components of your strategic plan with the key stakeholders.
- As part of the company's strategic planning and prioritizing process.
- To define and agree on how to reach our strategic goal.
- Outline the major results, actions and milestones required to achieve our strategic goal, along with the expected timing of each of them.
- It includes the reasons we want to define and measures success towards the goal.

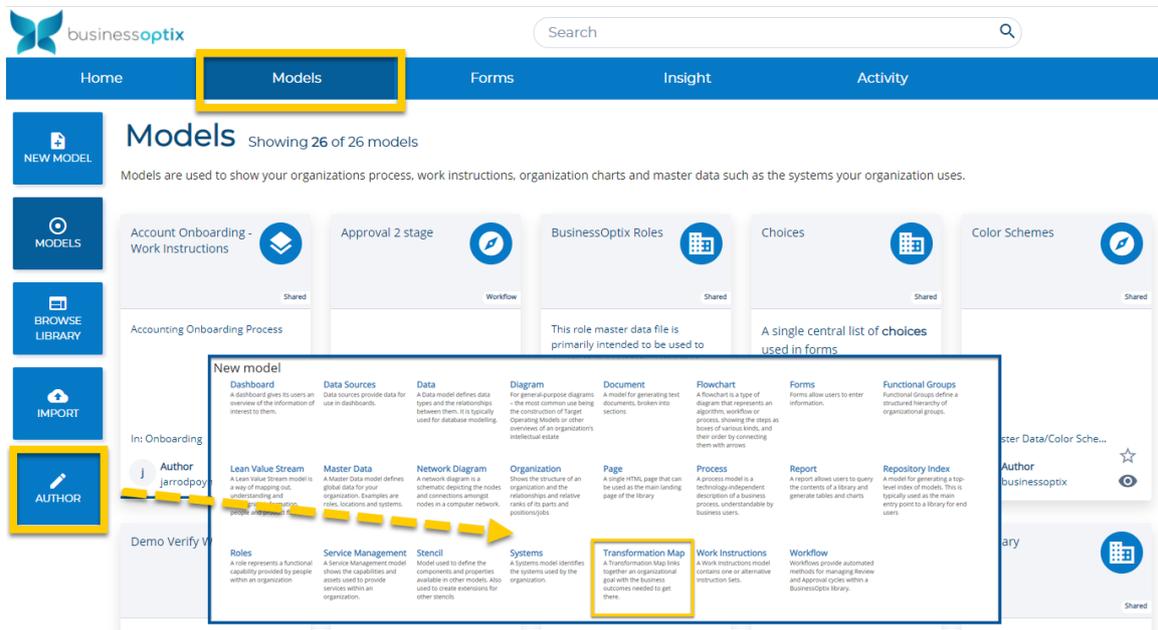
Pre-requisites of a Transformation Map

Before the creation of a Transformation map, it is very important to make sure the below pre-requisites are captured to help increase its effectiveness:

- Draft the goal or vision statement that will go in the top right corner.
- Determine the length of time when this goal or vision is to be achieved. i.e., 3 months, 3 quarters, 3 years, etc.
- Determine the timeframes for the Transformation Map.
- Clearly state the actual dates or use quarterly timeframes to define start and end cycles.
- Break down the milestones into shorter timeframes at the beginning.
- Determine the measurable objectives to track for objectives or outcomes.

Create a Transformation Map

To access this type of model, click from Home page on Models tab, then choose Author option a New Model a Transformation Map:

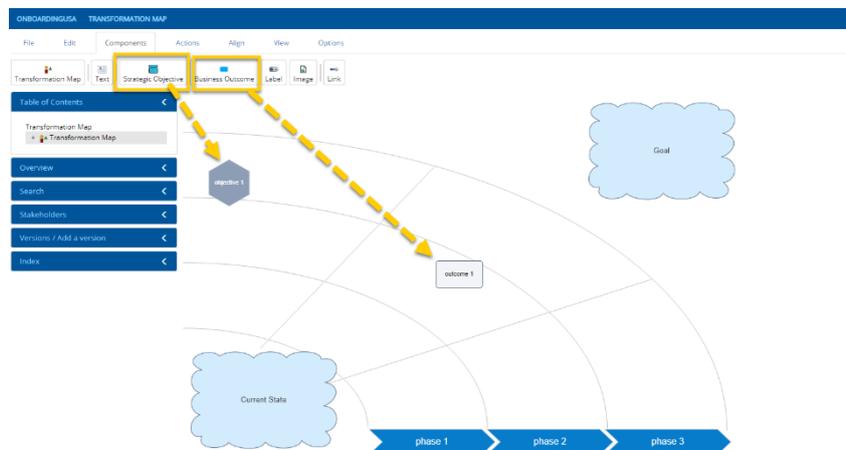


Framing a strategic objective

Strategic objectives are used when:

- There is a need to agree to the ultimate goal or vision with the stakeholder group
- Documenting goal using the concept components
- Confirming the timeframes, objectives to be used & document them as a part of the phase components with defined start and end dates
- Defining strategy tracks as specific areas of focus (the strategies should identify the key areas within the business for which to focus & achieve the ultimate goal)

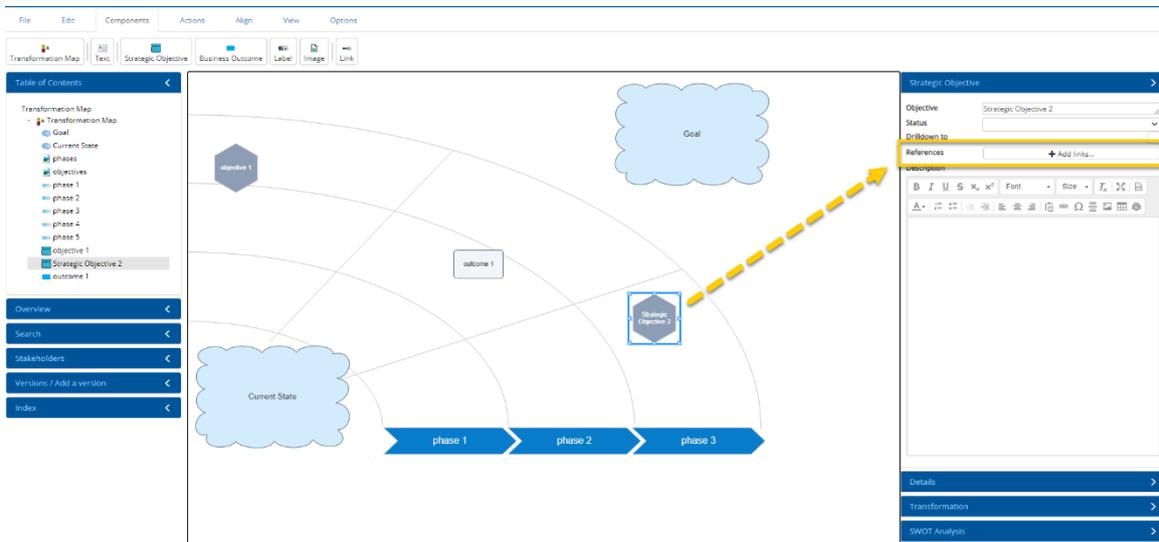
The Strategic Objective can be found under the Components menu:



NOTE: Timeframes and objectives are initially academic as the framework is not fully used yet. Modify the timeframes and categories as and when we define the actions and milestones.

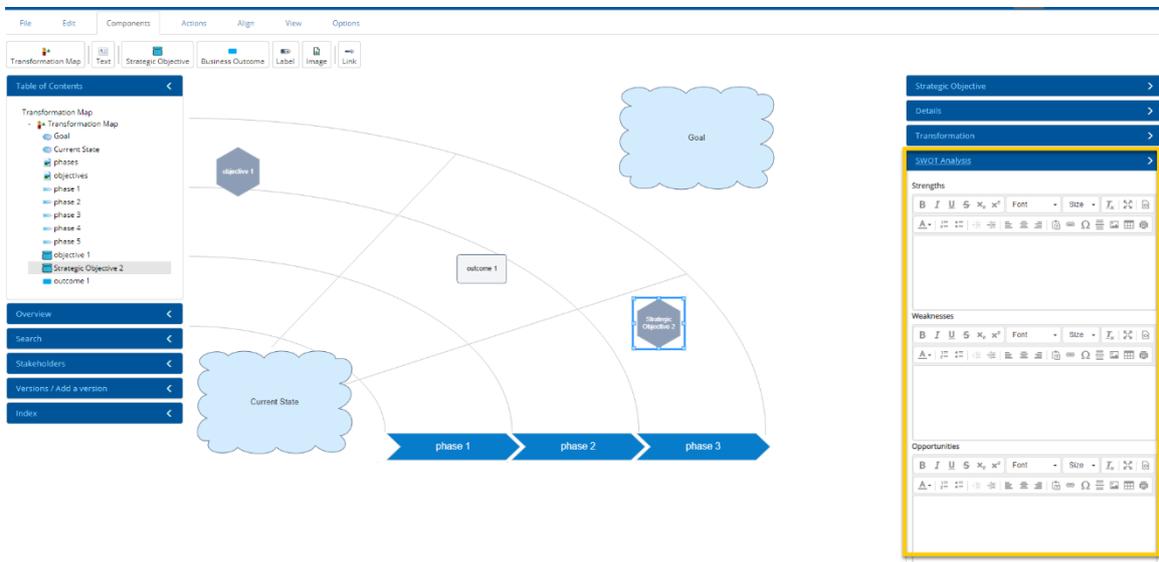
Link reference documents

Link reference documents to the strategic objectives by including anything that acts as a supporting document to substantiate the objective, use the References option in the Properties Inspector pane.



Performing SWOT analysis

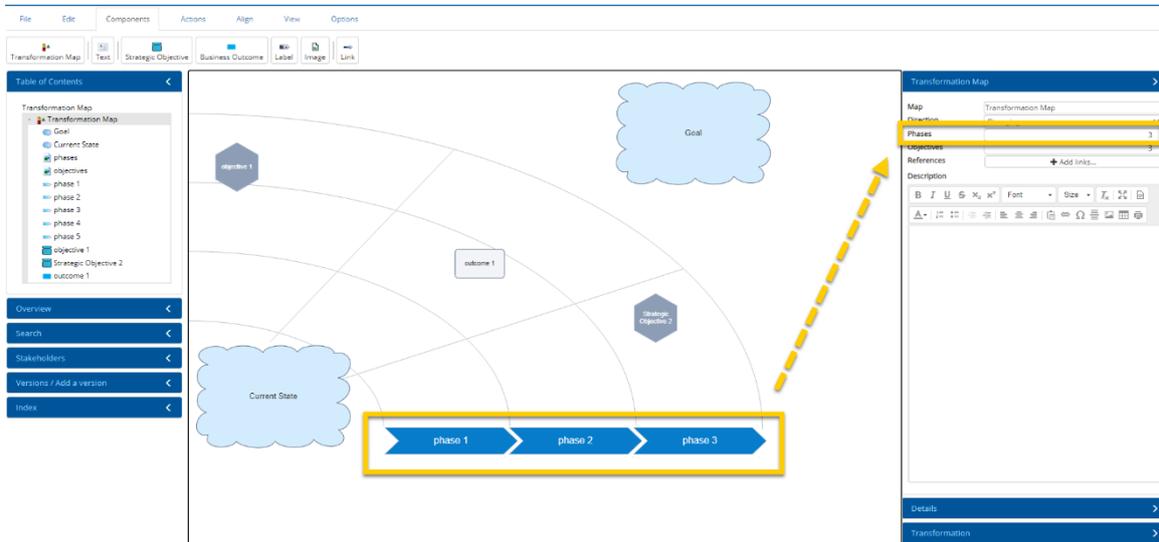
For any strategic objective, a SWOT analysis helps to identify its internal strengths and weaknesses, as well as the external opportunities and threats. To capture SWOT, refer to the SWOT Analysis option in the Properties Inspector pane.



Defining phases for each of the strategic objectives

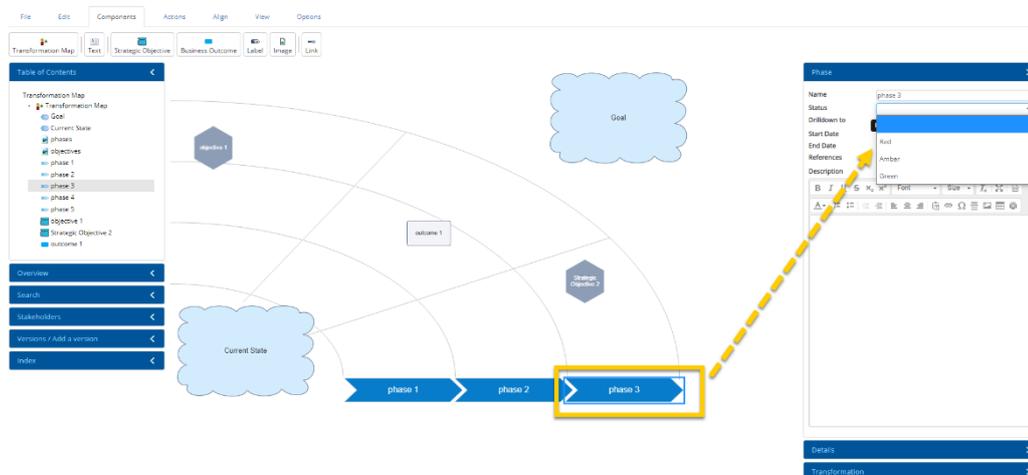
Phases help in categorizing the ultimate goal or vision of the stakeholder group. These phases are typically used to showcase time period (example, Short Term, Medium Term, Long Term) where the strategic objectives would be defined with specific start & end date.

In the option Phases in the Properties Inspector pane select the number of phases required to complete the transformation map. Once added, the phases would be shown on the T-road map as an example below:



Each of the phases can be substantiated with:

- Status (Red, Amber, Green)
- Start Date
- End Date
- Reference documents
- Brief description



Framing a Business Outcome

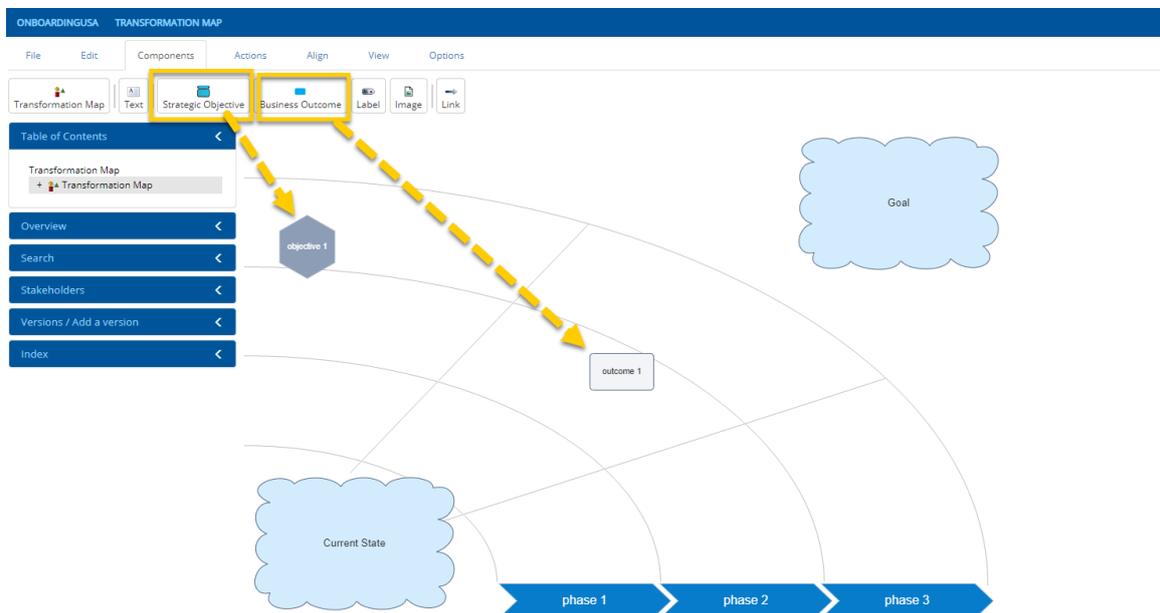
Outcomes help in defining which actions and milestones should occur and when. Every action and outcome should be aligned with a key strategy.

It is very important to be mindful of the interdependencies between outcomes. Refer to the below examples:

- A system may need to be in place before a training exercise can be arranged.
- If the dependency requires a significant timeline, cost or resources may have a large impact on achieving results within the timeframe of the map.

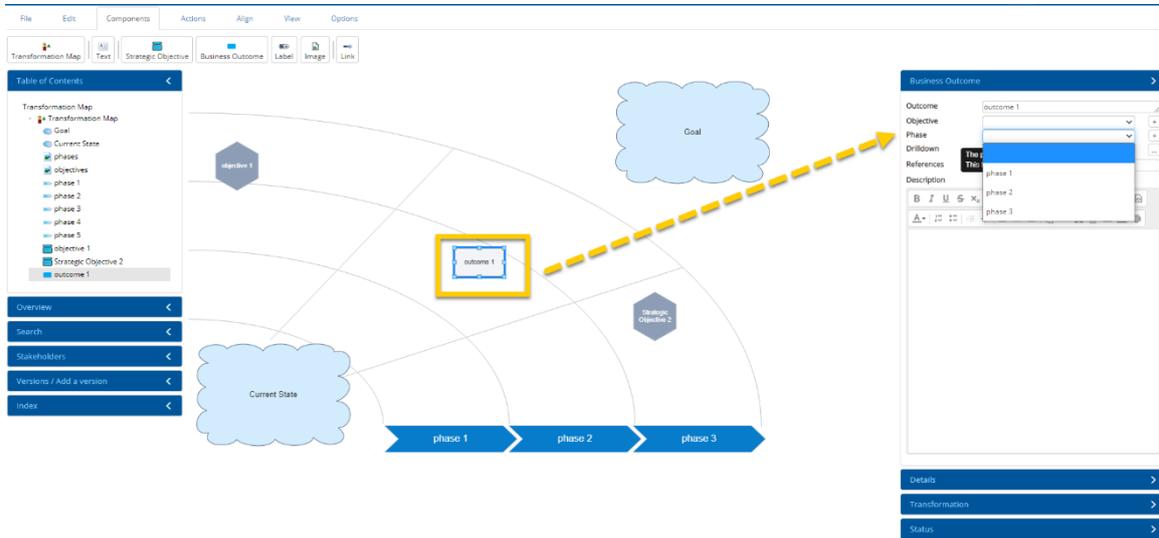
NOTE: Be sure to include projects that are already in progress or planned to start in the future which would help the transformation map to paint a realistic picture in turn resulting in maintaining balance for quickness & reasonability to achieve goals.

The Business Outcome can be found under the Components menu:

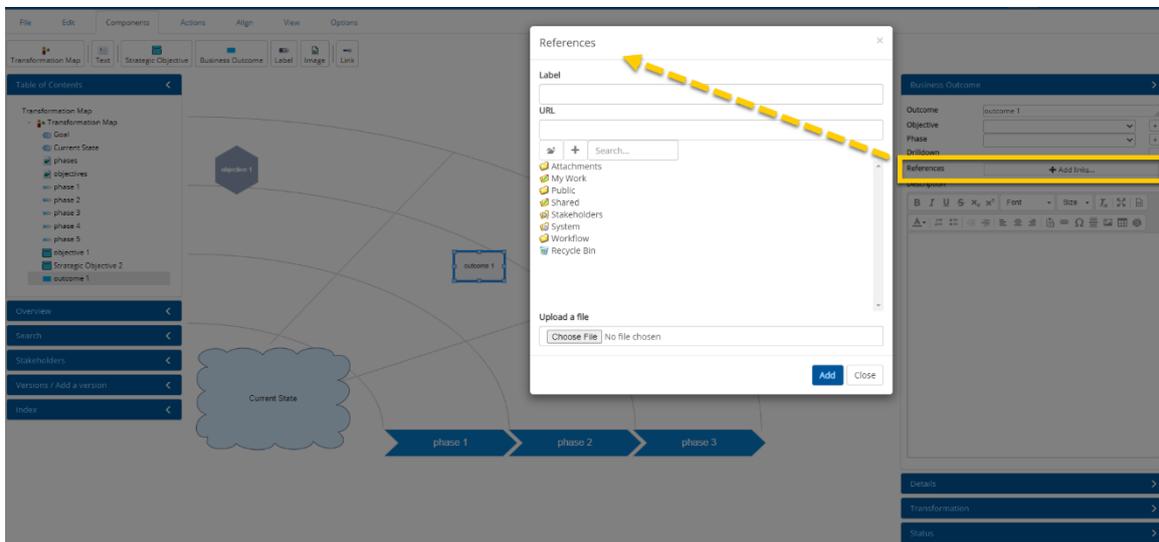


Linking business outcomes with strategic objectives & phases

Every business outcome needs to be linked to its respective strategic objective (1) & phase (2). Once linked, the outcomes can anytime be referred back to at a later point to enhance it with further information. This can be found under the Objective option in the Properties Inspector pane.

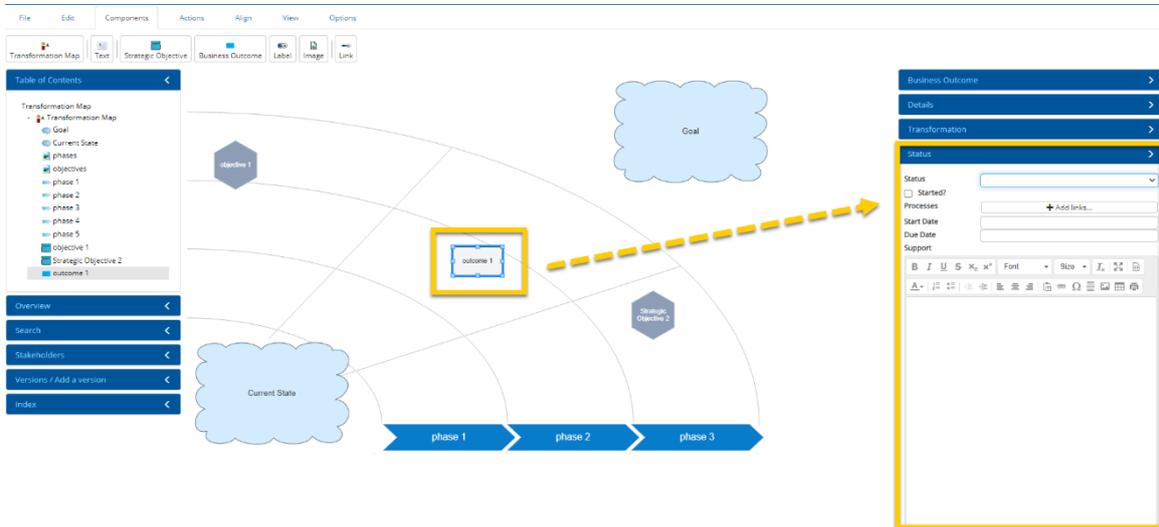


Similar to strategic objectives, the business outcomes can also be linked with reference documents which may include anything that acts as a supporting documentation to substantiate the outcome. Use the References option in the Properties Inspector pane.



Define status for each of the business outcomes

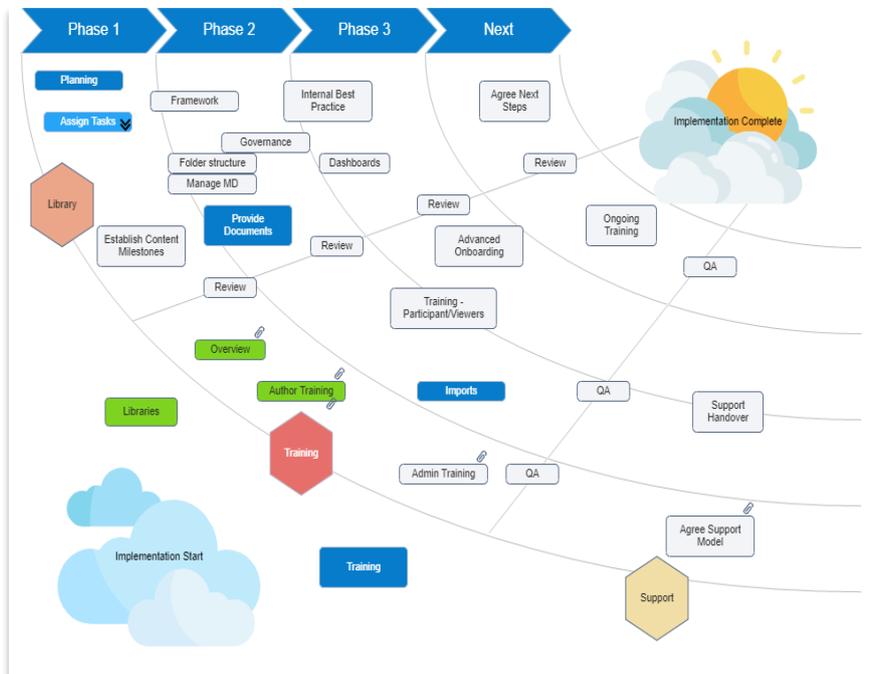
Each of the business outcomes should also be defined with a specific start and due date. Along with this, the status also needs to be defined for effective tracking and closure of business outcomes. The Start / Due date with the respective status can be found under the Status option in the Properties Inspector pane.



NOTE: Agree on who will be accountable for each element of the transformation plan. Chart the decisions and agreed-upon actions. Also agree the communication and follow up plan. These can be actionable within the platform using commenting and assigning tasks.

Conclusion

This is typically how a fully completed T-road map would look like:



2. Kanban Board

Completing a Kanban exercise using whiteboards and sticky notes is a great way to visualize our workflows, create to-do lists and gather the metrics needed to measure and improve processes. It is also powerful towards workflow optimization by increasing communications and helps limit work in process. A Kanban board often leads to the capture of user stories and use cases that can be valuable to process transformation.

BusinessOptix helps to digitize the Kanban exercise and link the "cards" or forms within the platform to process maps and other stencils. Having a digital Kanban board allows users to collaborate in process creation, share the maintenance, track progress, and create transparency with business stakeholders and process owners.

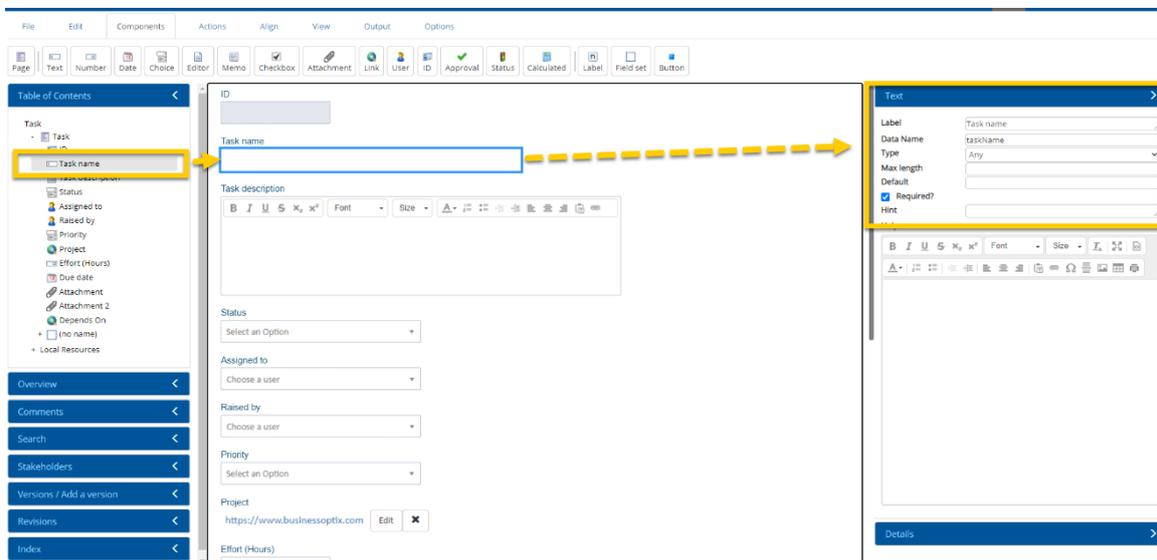
Create a Kanban "card" or form

Start by creating a form. From the Home screen, select Forms > Author > New Model > Forms.

New model

- Customer Journey**
A Customer Journey shows the touch points between a customer and the organization, arranged in sequence, and the emotional impact of each.
- Dashboard**
A dashboard gives its users an overview of the information of interest to them.
- Data Sources**
Data sources provide data for use in dashboards.
- Forms**
Forms allow users to enter information.
- Lean Value Stream**
A Lean Value Stream model is a way of mapping out, understanding and redesigning information, people and product flows.
- Master Data**
A Master Data model defines global data for your organization. Examples are roles, locations and systems.

When the new form opens, insert the desired components for the form, adding details for each one. For example, if task name is needed, add a text field to the form. This will open the text field details where the relevant sub fields need to be filled in.



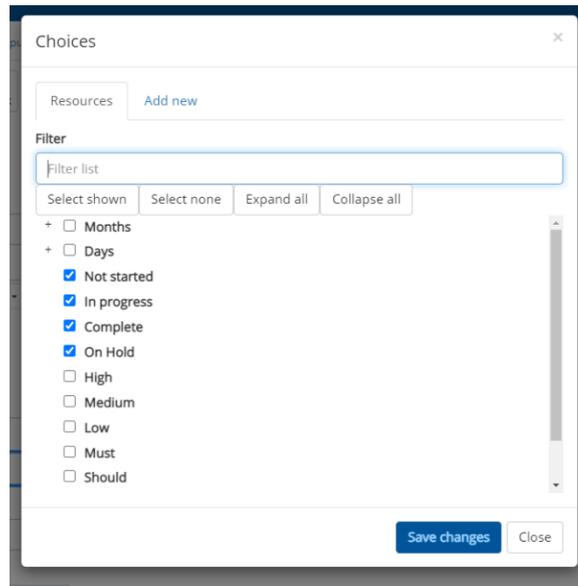
Once this is done, view the form as an HTML output.

The screenshot shows the BusinessOptix 'Task' form editor. The interface includes a top navigation bar with the BusinessOptix logo and a 'Task' tab. A left sidebar contains 'FORM' and 'TABLES' buttons. The main workspace displays a form titled 'Task' with the following fields: 'ID' (value: 9), 'Task name *' (text input), 'Task description' (rich text editor with a toolbar), 'Status' (dropdown menu, value: Not started), and 'Assigned to' (dropdown menu, value: Choose some users).

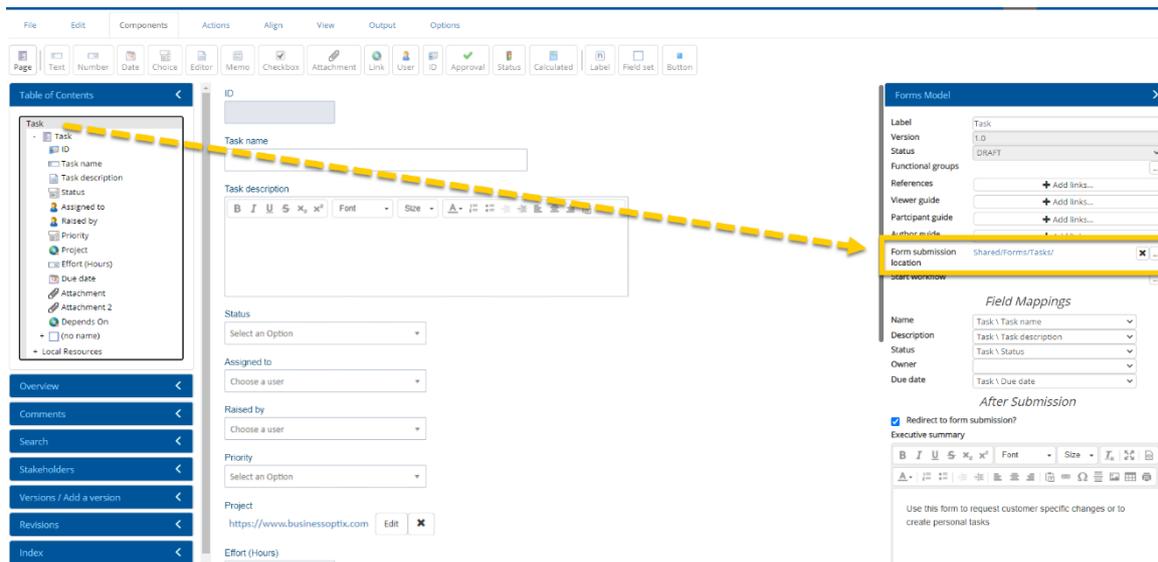
Add a new choice or select from an existing list under the choices section.

The screenshot shows the 'Choice' configuration panel. It includes the following fields: 'Label' (text input: Status), 'Data Name' (text input: status), 'Master Data' (dropdown menu: Choices), 'Choices' (list: Not started, In progress, Complete, On Hold), 'Default' (dropdown menu: Not started), 'Required?' (checkbox), 'Hint' (text input), 'Multiple selection' (checkbox), 'Display as' (dropdown menu: Dropdown list), and 'Show full name' (checkbox). A yellow box highlights the 'Choices' list. Below the configuration panel is a rich text editor toolbar.

By clicking on the 'Edit' button, a list of choices will open where a new choice can be added as a local resource.



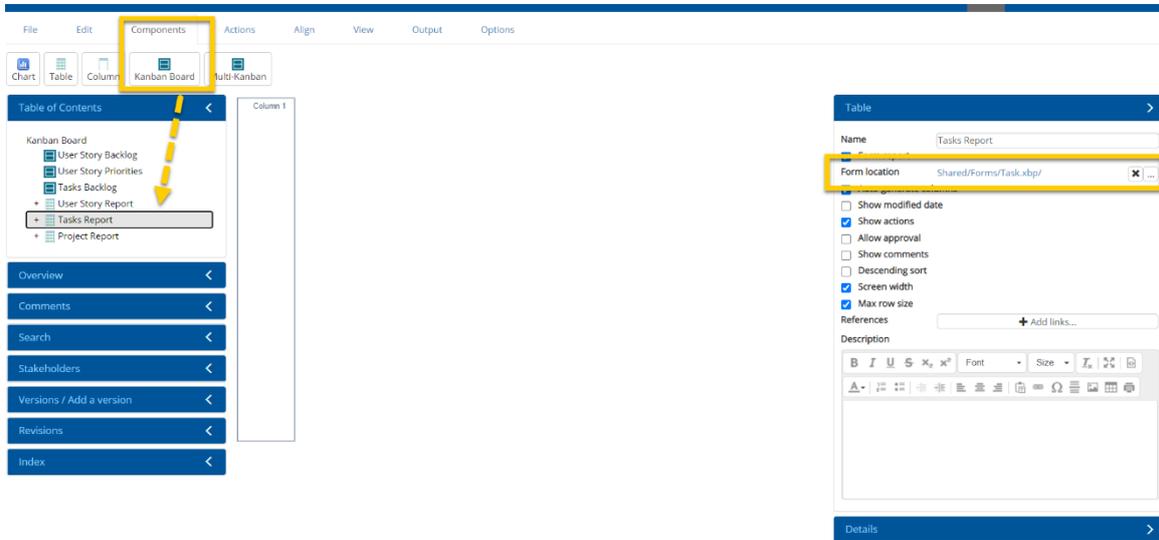
This can then be linked to a model or diagram by adding a link under the references. Specify where the form will be stored once it has been submitted. This can be done by clicking on the Model under the Table of Contents.



NOTE: Once the form has been completed, test the output by clicking on View HTML.

Create a Kanban board

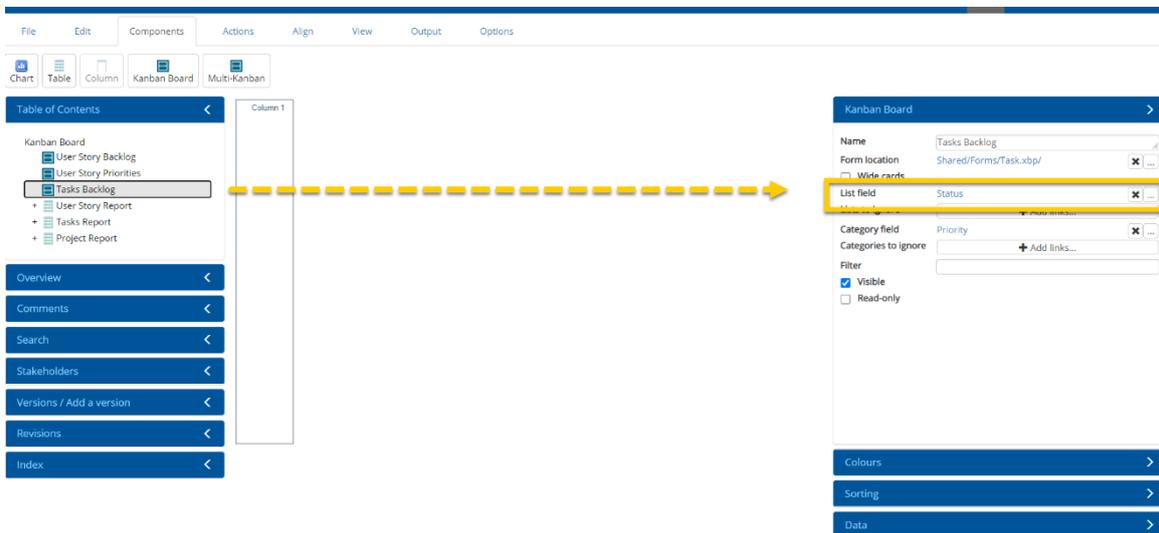
From the Components menu, click to add a Kanban Board to the model. Click the edit link button next to 'Form location' to add the form created to the board. This will link the "card" for use with the Kanban Board.



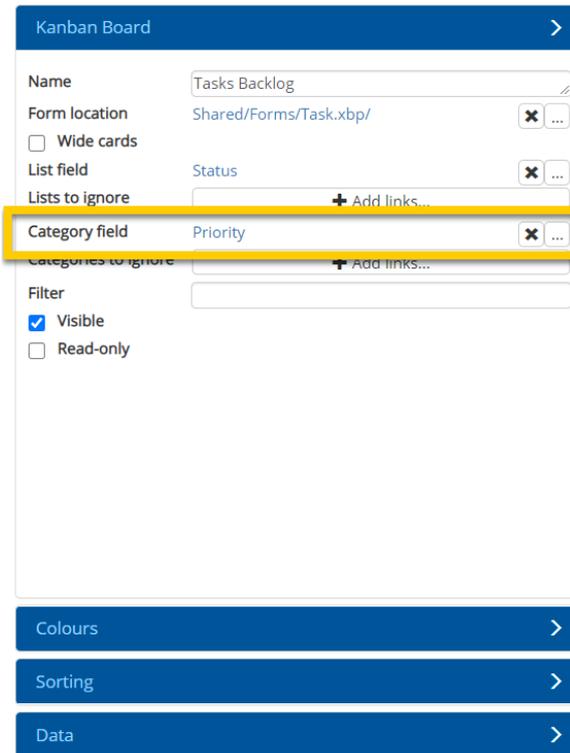
Create the visual columns of Kanban board. Simple boards have columns for:

- Waiting
- In progress
- Completed

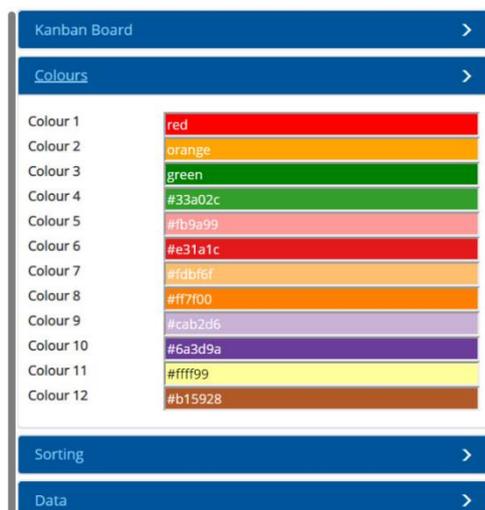
Click the Edit Link box in the List field area to link your selection.



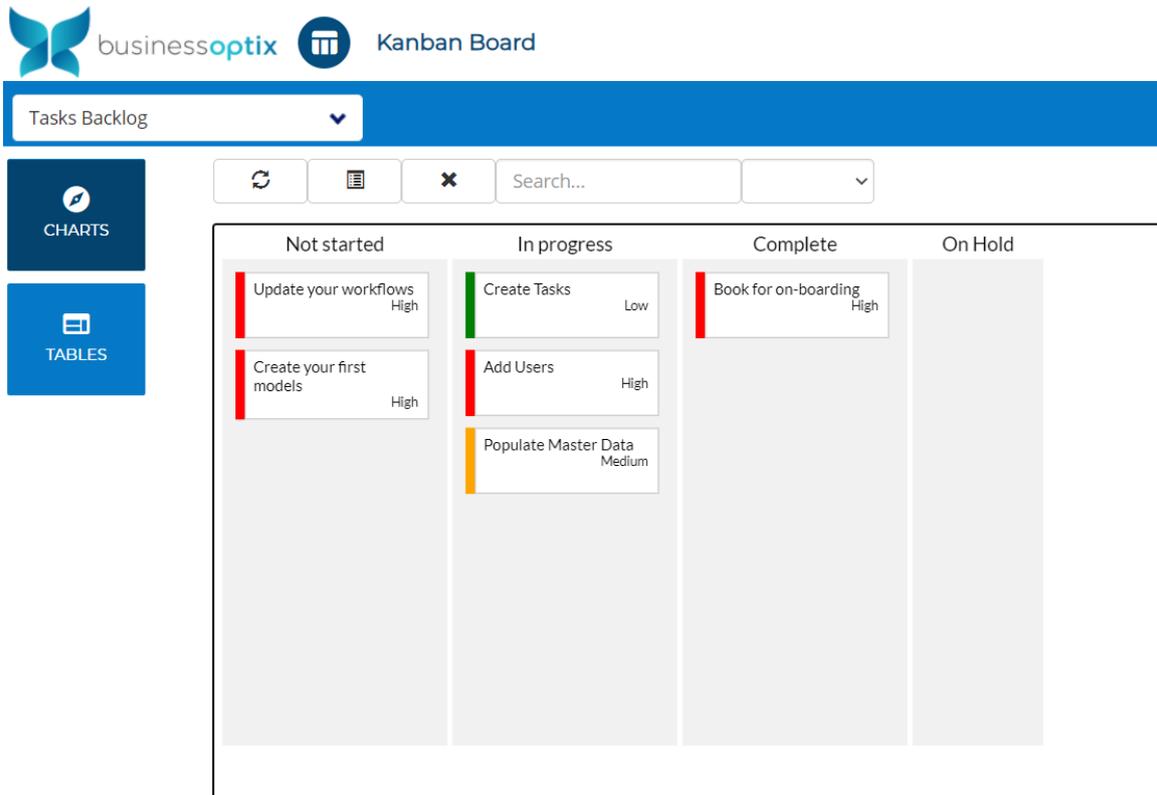
Select the Edit Link button next to Category field to select the data by which to prioritize, reflect impact to a project or to colorize groups of cards.



NOTE: Category Lists is connected to the Colors array in property inspector where users can choose up to 12 color categories for visualization based on order of choices in the linked selection or value of the selection itself. (e.g., if a list of choices is available from the data, the top choice in the list will reflect as the top choice from Colors array options. If only one value is chosen, all cards will carry the same color as the top choice in the Colors list.)



Once all the details have been entered/captured, click on 'Output' button to output the Kanban to HTML. Use the Sorting options to correctly sort cards on the board to properly reflect the visualization.



NOTE: The Data array allows to select extra data values for text placement inside of or around the Kanban card to view. Cards are moved from left to right to show progress and to help coordinate teams performing the work. Complex Kanban boards can be created that subdivide "in progress" work into multiple columns to visualize the flow of work across an entire process or value stream map. Cards are moved from top to bottom based on completion within a column to show progress.

3. Target Operating Model

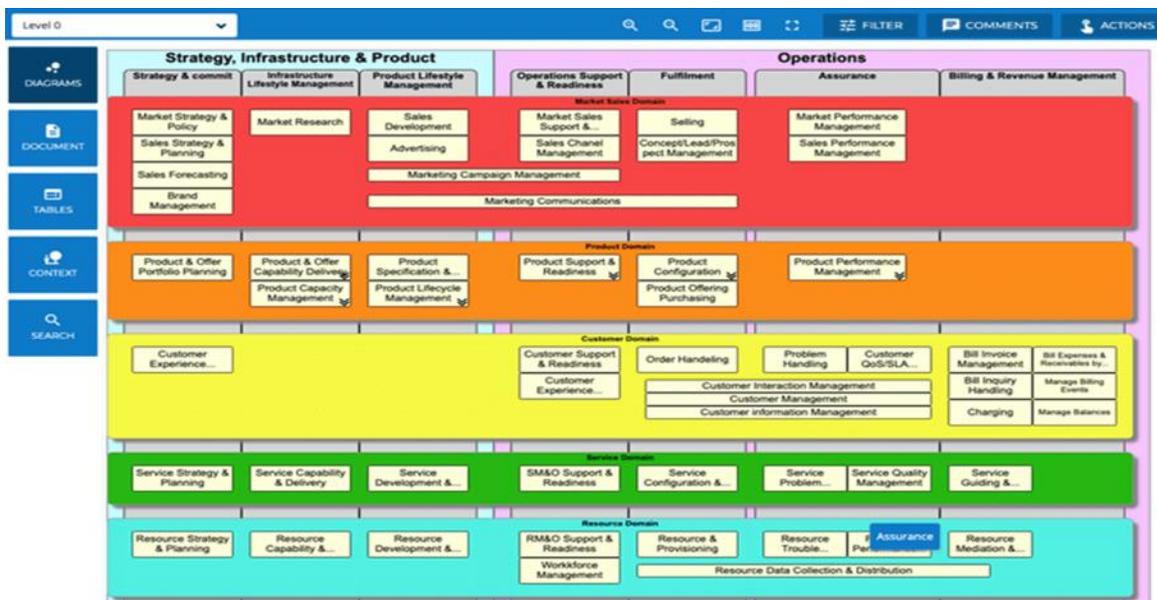
Overview of TOM Design

BusinessOptix helps to define, visualize, and optimize a broad range of operating processes, strategies, and workflows to the operating model, ensuring they are all aligned to the needs of the business. As the business climate changes, it helps manage transformations to the operating model, the same as processes, to ensure the business stays ahead of the competition.

Visualizing & Optimizing the Operating Model

Visualization helps to start working on the process layers – in doing so, creating an end-to-end view that links each function and illustrates the flow of processes across the organization.

Defining the target operating model before getting into the detail of process redesign allows organizations to understand the big picture and see how changes will fit together. The outcome is they are able to prioritize their efforts and move as one on their transformation journey.



At a functional level, BusinessOptix enables:

- Model the ‘as is’ and ‘to be’ operating model.
- Map people, processes, and systems at functional and organization wide levels, into the operating model.
- Prioritize and plan the change and transformation initiatives.
- Clearly document and communicate changes to all stakeholders.

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