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SSON's PROCESS EXCELLENCE MARKET REPORT 2021



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Naomi Secor

Global Managing Director, SSON

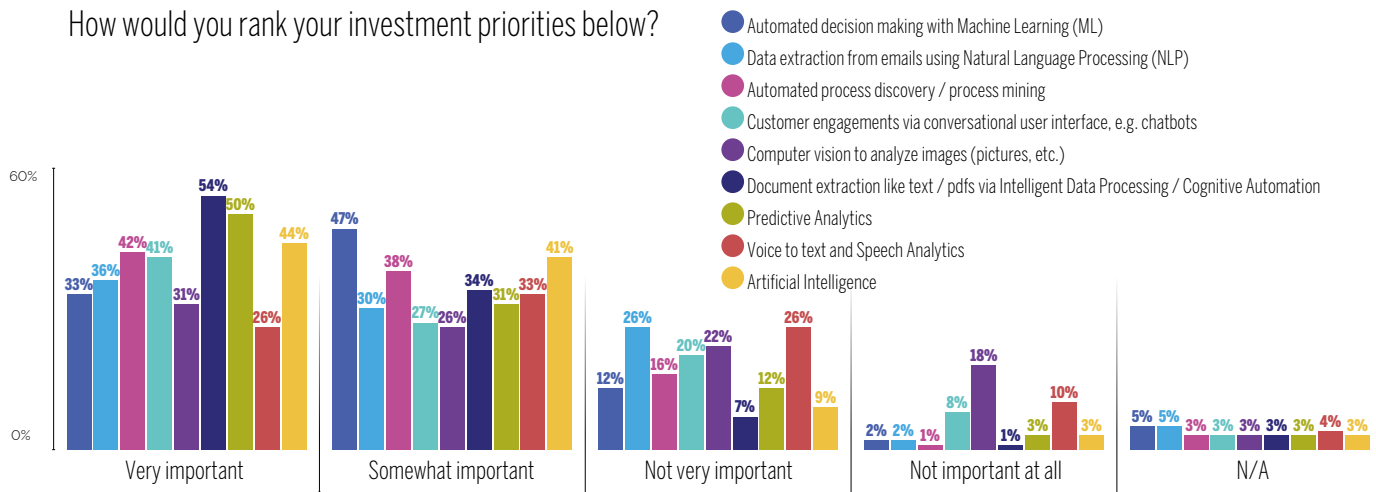
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INTRODUCTION

There's no doubt that the 'age of disruption' is challenging organizations of all stripes and sizes to rethink and rebuild to ensure businesses survive and thrive. And it's even more of an imperative for shared services organizations (SSOs) charged with making their enterprises resilient and agile.

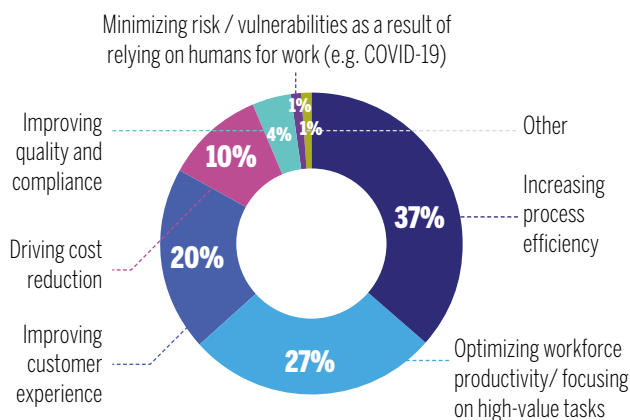
Shared services leaders are focused on moving to digital as evidenced by the investments they are making in a range of tools as shown in the chart below. The theme of these investments is better, automated processes facilitated by investments ranging from machine learning to artificial intelligence.

How would you rank your investment priorities below?



Process excellence is a key enabler to deliver quality, productivity and efficiency targets, ensuring that investments in automation pay off. The following chart indicates the **SSO leaders are convinced that process excellence is key to delivering**.

What drives Intelligent Automation in your organization?



And let's not forget about the imperative to operate effectively in a virtual world; **process excellence can be the bridge between office-based and virtual workforces, connecting delivery end-to-end.**

In the current environment delivering process excellence requires an agile approach. And yet, agility is elusive as SSOs remain embedded in inefficient process landscapes. While it's fair to say that enterprises are committed to embedding automation in their business services organizations, there are a number of challenges starting with the ability to identify the right processes, those that can deliver the greatest amount of value, and augment work done by humans.

Here's the current state of play. According to SSON's State of the Intelligent Automation Survey, 67% of SSOs are only moderately satisfied with the results of their automation initiatives. Why? Because they don't start off by selecting the right processes and then do not optimize the opportunity. Without these tactics, automation software such as RPA will not deliver on its promise.

SSON's Process Excellence Market Report highlights five capabilities that are imperatives for success as companies –and their shared services organizations–move to an increasingly digitized enterprise platform.

SECTION 1: PROCESS DISCOVERY: SELECT THE RIGHT PROCESS

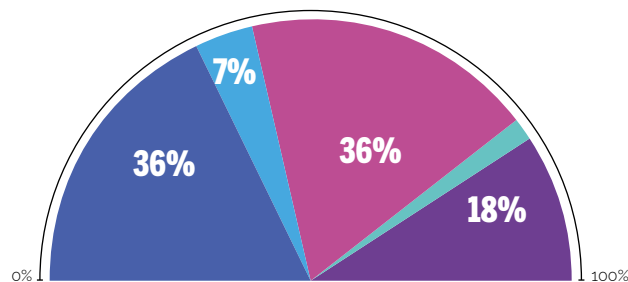
The Growing Need for Process Discovery

With **72%** of SSOs looking to increase their scope of work in terms of processes and geographic reach, adopting automation to enhance business processes will be critical to success, as shown below. Therefore, selecting the right work to move into a shared services environment and uncovering the full opportunity for automation makes process discovery more important than ever before.

Shared services operations cannot simply turn the switch on automation investments and expect to become digital; process discovery **ensures that the right processes are automated in the first place**, and evaluates the interplay between man and machine—how humans execute business processes. Increasingly, enterprises are prioritizing investment in automated process discovery as a first step to scale up solutions faster and extend beyond system impacts into what humans do.

As the following chart shows, the number one challenge SSOs are facing is the wrong process selection.

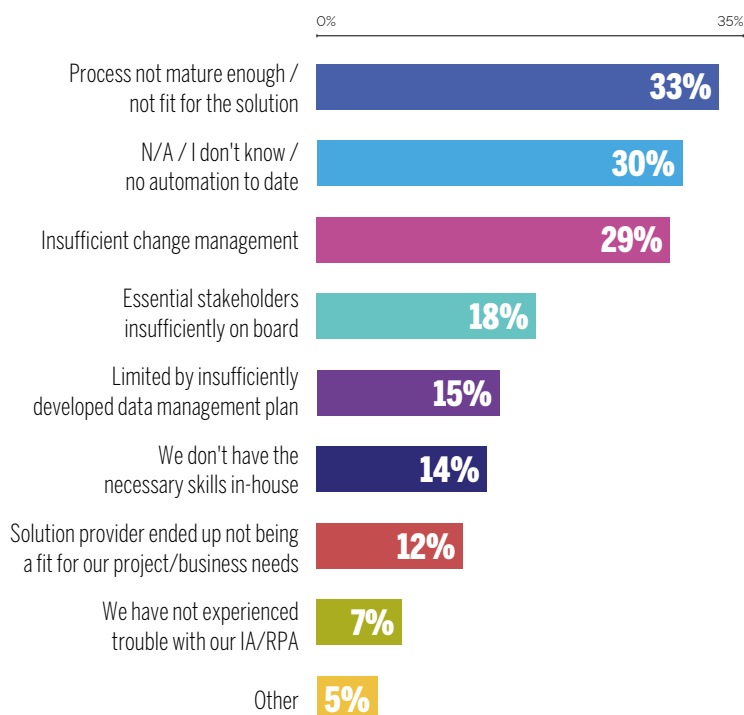
Are you planning to expand your scope of work next year?



- Yes in terms of services
- Yes in terms of geographic reach
- Yes in terms of both services AND geographic reach
- No we are reducing services and/or geographic reach
- No, no change planned

Source: SSON's 2021 State of the Industry Report

Where your IA project has run into trouble, what do you attribute this to? [Multiple Choice]



Source: SSON Global Market Review: Intelligent Automation in Shared Services State of the Intelligent Automation



Process Discovery Deals with the Growing Complexity of Processes

As businesses grow and strive to differentiate themselves from the competition, processes have become more complex. This complexity can cause new events to occur which businesses may not be aware of.

Therefore, process discovery techniques are vital to understand it 'as is' and detect process deviations.

But there's a fix for this challenge. Today, automation solutions enable entire process flows to be automatically recorded and documented by the business user; process analysts are then able to review these recordings to identify automation opportunities, enabling RPA experts to build the relevant bots. The entire process of identification and deployment can be combined in a seamlessly integrated solution.

Interrogating raw event logs and extracting relevant

data to view actual processes is critical, but it doesn't tell the whole story. By using cause-and-effect analysis, connections to different events allow them to create up-to-date process models and understand variations. This allows SSOs to select the optimum processes for automation. Businesses can then unlock their automation initiatives' full potential, getting to market quickly and delivering on the case for investment.

How Process Discovery Minimizes Complexity:



Reducing costs:

helping businesses identify the best processes for automation, thus preventing variations and errors that cause unnecessary costs.



Extracting data:

collecting event logs and performance metrics from company enterprise systems.



Implementing process map events:

analyzing collected data and mapping each case from the event logs. Process deviations then become apparent, highlighting manual changes or errors caused by the variations in the process.



Combining events to create 'as is' processes:

visualizing process maps to illustrate the who, when and where each process variation originates from or its current state, including sub-processes.

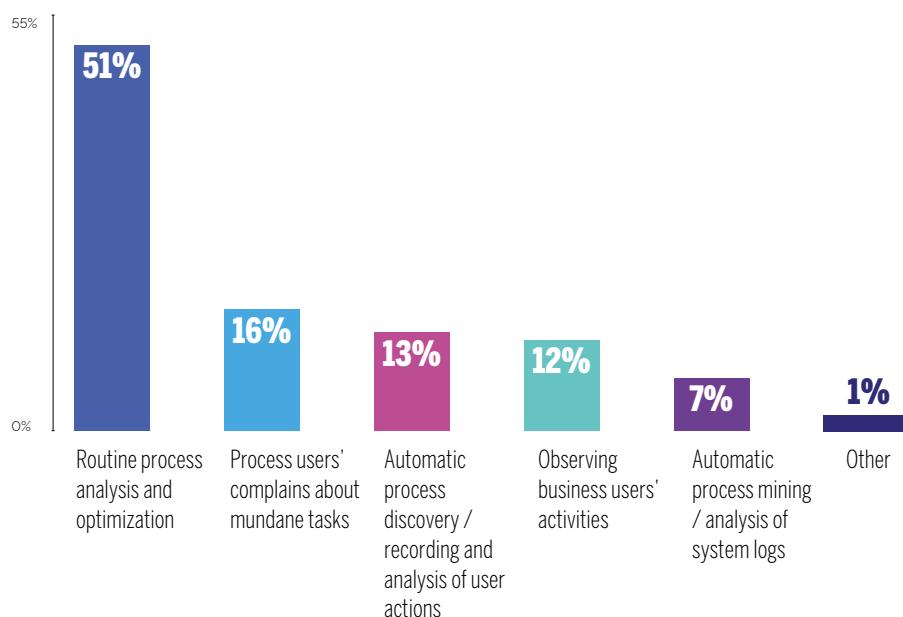


Avoiding common automation pitfalls:

By seeing the full picture, businesses can implement their RPA solutions in their desired timeline, unlocking the initiative's potential.

Yet SSOs still have some work to do. The current approach in assessing process candidates for automation sub-optimal behind with a majority of organizations conducting routine process analysis and optimization tasks, which is overly complex and time-intensive, as shown in the following chart.

What is your approach to assessing automation opportunities / process candidates?

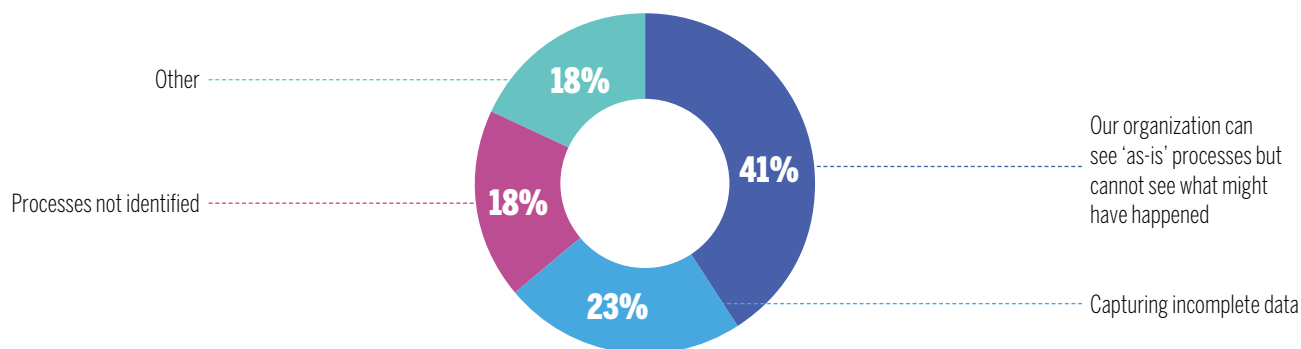


Source: SSON's Global Intelligent Automation Survey for SSO/GBS 2020

Overcoming Hurdles

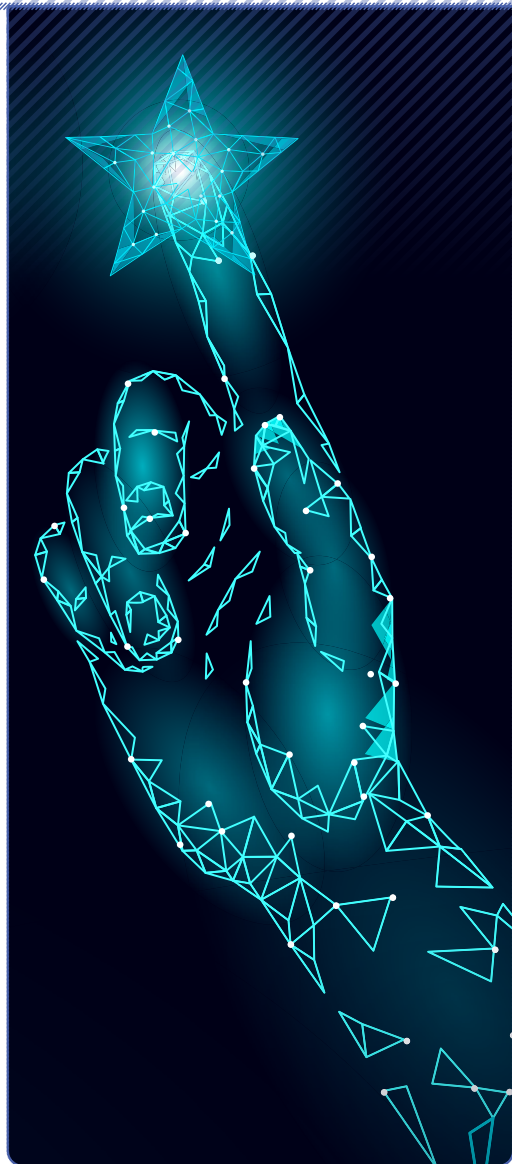
One of the greatest challenges with process discovery is that most organizations **can visualize 'as-is' processes but cannot understand their implications**. The root cause? Traditional process identification methods are extremely time consuming, prone to bias and disagreement, and entail a certain degree of risk, calling for a solution that can automatically identify, analyze and recommend which processes companies should automate. Process discovery delivers a more accurate and deeper understanding of processes, enabling maximum process optimization for a business and shortens the path to value for RPA implementation, making it the first essential step to automation success.

WHAT ARE THE MAIN CHALLENGES WITH PROCESS DISCOVERY?



Source: SSON's Process Excellence Survey 2021

As organizations strive to become digital businesses, they must increase their ability to investigate and analyze processes. The adoption of automation technologies, such as RPA, machine learning and natural language processing, has proven that business leaders want to invest in technologies that improve business performance. Process discovery is yet another tool that organizations are increasingly leaning on to achieve their business outcomes.



And there's an even greater benefit:

Enhanced Customer Experience

If frictionless processes are at the heart of customer experience, process discovery is key to identifying the bottlenecks, variations, and lack of speed that drives a suboptimal experience. By commencing the automation process with discovery, SSONs and the enterprises they serve are able to:

- Reduce variations in process caused by exceptions that are driven by cultural or regional preferences or other factors, leading to increased standardization
- Reveal problems in the processes that touch the customer or employee early on so they can be corrected
- Identify up and downstream challenges in end-to-end processes

SUMMARY

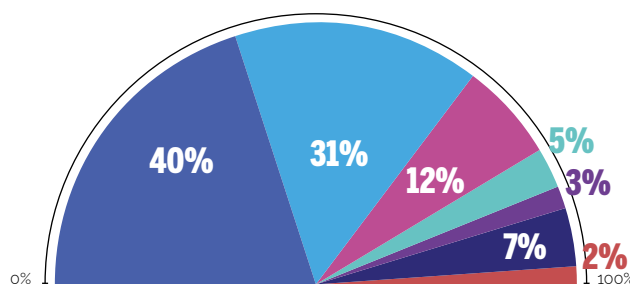
The ability to automate the process of discovery is a game-changer in terms of speeding up what was a manual process. SSON market data confirms that process selection remains one of the leading challenges to successful automation. Process discovery makes this possible.

SECTION 2: PROCESS MINING: KNOWING WHAT TO FIX

Unlocking Value

Now that your SSO has focused on the right processes, knowing what to fix is of paramount importance. And the industry is taking this seriously; in the last year, process mining has become the hottest topic in the shared services industry, replacing RPA. With approximately a **quarter of shared services already implementing mining solutions** (with impressive results) and **another 31% currently planning to implement**, it is imperative to identify the processes ripe for automation to unearth bottlenecks, accelerate digital transformation and create flexible processes. These insights are helping SSCs add **never-before-seen value** back to their processes.

Where do you stand on Process Mining / Process Discovery?

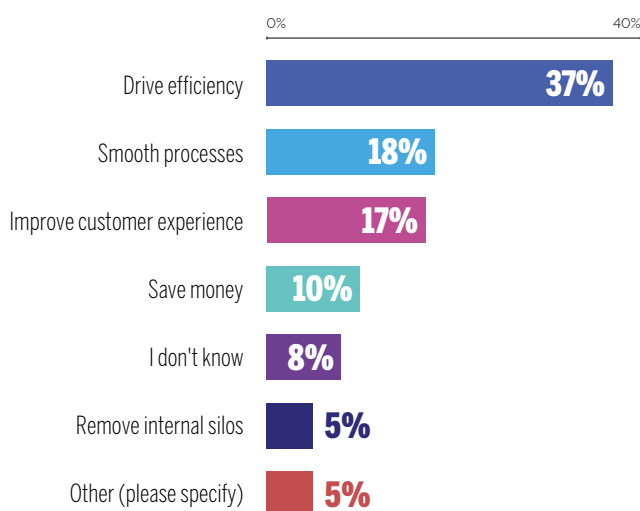


- We have not broached this yet
- We are currently investing in / planning to invest in tools that offer this capability
- We already use such tools and have had great results in terms of optimizing automation/RPA
- We already use such tools and have had great results in terms of optimizing the process itself (i.e. not RPA driven)
- We already use such tools but results are disappointing / negligible
- We are not familiar with Process Mining
- Other

Source: SSON's GBS and Shared Services State of the Industry Survey 2021

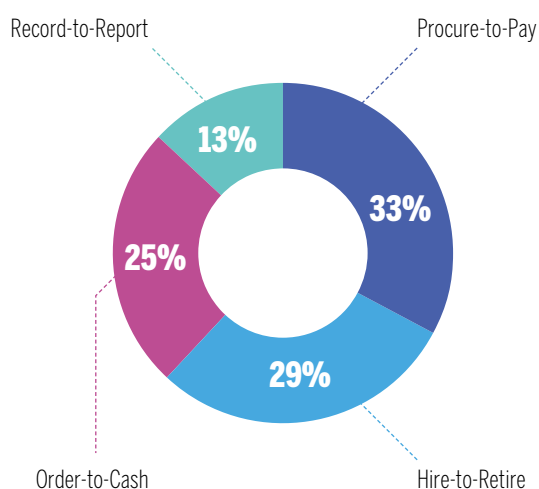
Process Mining Emerges as an Essential Tool to Drive Efficiency and Combat Disruption in END-TO-END Processes

The Main Reason for Using Process Mining is to Help My Organization:



Source: State of Process Excellence Report, PEX Network

Which of these processes has experienced the highest level of disruption as a result of the pandemic?



Source: SSON's Impact of the Pandemic One Year on Survey

Well into a year of coping with the pandemic, SSON asked our community about the drivers of Intelligent Automation. Increasing process efficiency and optimizing workflow productivity take the lead.

The opportunity for SSOs to adopt process mining is substantial, particularly when it comes to end-to-end process management and optimization. According to SSON's Impact of the Pandemic One Year On Survey, respondents confess that operations were not smooth sailing. Hire-to-retain (H2R) was cited under the most pressure from COVID-19 as a result of layoffs, work from home and tax compliance. Order-to-Cash was close second. Given the fact that for most enterprises the pandemic made cash king, processes were under great pressure.

Shared services and global business service (GBS) organizations are often at the heart of end-to-end process ownership with the promise of harmonizing processes and breaking down functional silos to create a "boundaryless" experience. But reality shows that very few organizations have yet to crack the code for effective end-to-end process management. Even most multifunctional GBS organizations still operate within their individual functional silos.

Success in end-to-end process management hinges on two fundamental factors that process mining can support:

1. Establishing an effective process management organization, talent, and governance model to break down barriers and drive optimization
2. Equipping those individuals accountable for process management with the right capabilities, methods, and tools among a myriad of choices.

How Does Process Mining Improve Performance?

If SSOs focus on processes **as they actually run as opposed to how they are prescribed**, it's possible to spot bottlenecks, delays, inefficiency and redundant activities, and immediately course correct. This allows shared services organizations to optimize process flows, which translate into cost savings, shorter processing times, higher efficiency and improved customer experience.

Some of the **specific areas where shared services organizations are benefiting from process mining** include:

- Improved cycle times
- Making better workflow handoffs
- Improved insight into where work is getting stuck
- Data aggregation to improve decision support
- Process lead time improvements
- Gaining productivity through process standardization

One of the key lessons that we've learned in some of the process mining experiments, is you need a team on the business side who's invested in looking at the results and helping drive action and improvement. Where are your bottlenecks? Where are the problems? You're not going to get the value out of process mining unless you have the people with the capacity and the bandwidth to actually go fix the problems.

Camille Ready, Director Corporate IT, **Georgia-Pacific**

The value piece is important, making sure that your business case and proof of value are accurate. We've had situations where some pretty unrealistic values come to us. Having realistic proof, the values or business cases are very important because you don't want any surprises on the back end.

Shaun Kessler,

Associate Director, Intelligent Automation, **Colgate Palmolive**

SUMMARY

Shared Services Organizations at their core are founded to increase corporate productivity. Process mining gives them the continuous visibility to understand how their processes truly operate, and subsequently improve their execution.

Read on to hear how Celonis, the "market leader" in process mining is helping SSOs reach their full digital potential.



An Expert's Perspective

Q&A With **Lars Reinkemeyer**, VP Customer Transformation at **Celonis**

Q: Why now? How has process mining changed in recent years?

A: Companies are maturing and starting to embark on projects to bring together previously disparate technology projects such as process mining, process simulation, low-code app development, and automation. Process mining itself is critical to getting exponential returns for the other projects, which is why the Celonis Execution Management Systems (EMS) combines all of these capabilities and embeds process mining derived intelligence throughout.

While the focus of the last decade had been on process "insights", we are now concentrating on the "action" part to enable companies to generate value. Our innovation from process mining to EMS reflects this evolution, as it combines intelligent capabilities to identify execution gaps in real-time and enables users to work more efficiently.

Q: Why does process mining matter so much to SSOs?

A: Shared service organizations at their core are founded to increase corporate productivity. Process mining gives them the continuous visibility to understand how their processes truly operate, and subsequently improve their execution.

Q: Lack of knowledge and expertise are barriers organizations face when implementing process mining models. What are your tips for addressing this issue and how would you overcome this?

A: Look for process mining vendors, like Celonis, that have distilled this expertise into pre-built system connectors and analyses. There are many commonalities between processes across different industries (Accounts Payable as an example). Ensure that the intelligence is packaged and available to reduce the time commitment needed from data scientists and subject matter experts.

Q: How does process mining drastically improve performance?

A: Process mining automatically identifies the gaps in business execution, measures their impact on the most critical business outcomes, and then prioritizes them to get the biggest return on investment for operational changes. When this intelligence informs automation capabilities, such as in the Celonis EMS, the gains are multiplied exponentially.

Q: What is required to make it work?

A: The first step requires access to the relevant event logs, using our standard system connectors. Step two focuses on proven use cases, with quick value realization. Step three enables the users to derive action from insights and thus eliminate execution gaps and realize value.

It also depends on the overall scope of the project, but at minimum you need access to the underlying systems to generate the process intelligence from the data. OPEX, IT, and line of business teams should all be involved to work towards a common goal.

Q: What can go wrong and how would you avoid it?

A: Experience shows that the human factor is most critical, beyond the technical deployment. Reluctance to change is a critical factor, which needs to be considered. Our change management approach is focused on generating an appetite for using the EMS solution. Taking people along the journey, providing dashboards which are intuitive and easy to use, as well as, intelligent tools and support are crucial to avoid failure and assure adoption for an ultimate value.

As with any enterprise technology initiative, there is a risk of going over time, over budget, and not delivering the expected ROI. You can avoid this by using aforementioned pre-built system connectors and analyses, and by ensuring that the process mining solution is not just looking at process efficiency, but is tied into business outcomes from day one.

How Deutsche Telekom's Shared Services Center Saved Over €66M

Celonis helped Deutsche Telekom Services Europe save over €66M by maximizing the execution capacity of their Procure-to-Pay process to tackle duplicate payments and cash discount losses.

Success isn't a goal or destination. It's a journey.

For Deutsche Telekom Services Europe (DTSE), a subsidiary of Deutsche Telekom, success means providing innovative, high-quality, end-to-end shared services across the company.

The Shared Services Center combines the Finance, Reporting, Procurement and HR functions to deliver a highly digitized Procure-to Pay process for the entire Deutsche Telekom group. They handle everything from negotiations over requests and order management, to invoicing and payment, so that other departments can focus on their core business.

The structure is quite innovative, says Peter Tasev, Senior VP of Procure-to-Pay at DTSE. "Having Procurement and Accounts Payable under one roof is not very common, or at least not as common as it should be."

Digitalizing the end-to-end value chain — from purchase requisition in Procurement to checking payment status in AP — is a mammoth task that requires not only the right mindset but the right technology, too. "We wanted everybody to work with the same standardized structures, processes, and data," says Tasev.

Getting to the root causes of execution gaps

DTSE's Procure-to-Pay process handles over 2M order items — with an order volume of more than €7B — and processes almost 9M invoices a year. It needs to run like a well-oiled machine. The slightest hiccup in their value chain could mean millions of dollars in losses.

One of the main challenges Peter Tasev and his team faced was to leverage the vast amount of data generated every day in the Shared Services Center to eliminate execution gaps and inefficiencies. Though they had successfully digitalized all of their core processes and were aware of some pain points, DTSE struggled to zero in on the root causes of these execution gaps and, by extension, act on them:

- Duplicate payments to vendors led to high cash losses.
- Blocked payments prevented them from maximizing cash discounts.
- Suboptimal delivery date accuracy caused harsh penalties.
- Employees were wasting time on low-value transactional tasks.
- Discussions, and ultimately business decisions, were based on subjective experiences, not numbers.

That's why DTSE turned to Celonis.

CELONIS CASE STUDY

Scaling up data analytics with the Celonis EMS

By connecting data from more than 10 source systems — such as SAP Ariba and Salesforce — to the [Celonis Execution Management System \(EMS\)](#), DTSE gained unprecedented visibility into their process flows. "I was astonished when I saw what Celonis could do for the very first time. There is simply nothing comparable on the market," says Tasev.

"Once we had everything set up, we had this 'Wow' moment. For the first time, we saw our processes as they really are and could directly point out inefficiencies."

Armed with an always up-to-date knowledge of how their processes actually run, DTSE could now not only define new KPIs, but also develop an early warning system for the KPIs going off-track.

"Celonis is a game changer," adds Christian Unterbusch, VP of Operational and Strategic Steering for Procure-to-Pay at DTSE. "By using Process Mining, we established a fully data-driven organization within the Procure-to-Pay area." This was a goal that the Shared Services Center had been pursuing for almost a decade.

€40M
annual savings
through cash discounts

€12M
in tactical savings

€10M
savings within
Procurement in 2019

- 1. Maximizing cash discounts:** Real-time reports with open blocked invoices helped DTSE achieve a **cash discount rate of 96%** and led to additional savings of a staggering €40M per year.
- 2. Paying on time:** The Celonis [Automation Engine](#) automatically prioritizes invoices to drive on-time payments. With the help of real-time alerts and automated process steps, DTSE reached an **on-time payment rate of over 90%**.
- 3. Increasing automation:** DTSE increased their no-touch rate significantly, which freed up capacity for tactical sourcing and resulted in tactical savings of **€12M**. More efficient processes mean DTSE's Purchase Orders are now **right the first time, over 90% of the time**.
- 4. Avoiding duplicate payments:** DTSE also established a real-time analysis for duplicate payments. By leveraging both Celonis' [Core Mining Engine](#) and [Automation Engine](#) to compare all outgoing payments and flag duplicate payments to employees, DTSE has saved **€3M** — and blocked any future duplicate payments too.
- 5. Enforcing contractual penalties:** DTSE also systematically analyzes contracts for contractual penalty options. As a result, they received approximately **€1.6M** in penalties in 2019 alone.

"Our internal customers at Deutsche Telekom benefit tremendously from using Celonis," summarizes Unterbusch. "Employees who were doing low-value transactional tasks in the past, now have the time to select suppliers or negotiate better payment terms. This helps our teams achieve millions in savings throughout the year."

"In 2019, we were able to save over € 10M using Celonis within the Procurement area."

Christian Unterbusch, VP of Operational and Strategic Steering for Procure-to-Pay at **Deutsche Telekom AG**

CELONIS CASE STUDY

Maximizing execution through the company

To this end, DTSE set up a Center of Excellence for Process Mining. Serving as an interface between IT, data scientists, data analysts, and business analysts as well as executives, the team covers all areas within the Execution Management cycle from data collection to [analytics](#), [strategy](#), [management](#), [action](#), and [automation](#).

"Process Mining delivered significant added value by helping us identify inefficiencies, implement measures to improve processes in real time, define KPIs accordingly and continuously monitor them."

"What sets Celonis apart from other tools is that all employees have the same view on the data. Everyone has the same truth," says Michael Gudel, Project Manager for Celonis, DTSE, and Deutsche Telekom Group. By delivering an objective view of process flows and execution gaps, the EMS allows teams across the company to get behind a single goal.

No more subjective opinions, no more guesswork.

1,500

Celonis users

150

use cases

"We have people from ICS*, Audit, Finance, Controlling, and Technology coming together to discuss end-to-end process improvements using the Celonis technology," says Peter Tasev.

Nowadays 1,500 employees use Celonis for 150 use cases across the entire Deutsche Telekom Group.

"Everyone is using Celonis — from Accounts Payable to Accounts Receivable, Procurement, HR, Customer Service, and Audit Compliance", says Gudel.

Bringing AI to Deutsche Telekom

But if success is a journey, then DTSE's mission to achieve Process Excellence has only just begun.

DTSE is planning to implement Celonis in a number of other areas in 2021, including Supply Chain Management and their customer journey. Backed up by Celonis' findings, DTSE also wants to offer their internal customers prescriptive analytics. "We want to bring process intelligence to the next level and implement AI into our processes," says Michaela Drost, Co-Lead for DTSE's AI Incubator Program.

The Celonis EMS combines the power of Process Mining, Automation, and AI to do that for them.

"The vision I have for my business area is that in five years' time, nobody will need to touch our transactional system, unless Celonis requests or suggests it", says Peter Tasev.

A vision that proves once more that innovation is at the core of Deutsche Telekom — and that while success is an ongoing journey, DTSE are already well on their way.

**Deutsche Telekom AG's Internal Control System*



SECTION 3: PROCESS INTELLIGENCE: THE KEY TO UNLOCKING ULTIMATE VALUE





The Value Proposition

What if you could make data intelligence work for you? Disparate process data, when collected and used intelligently, can provide unlimited value and benefit opportunities, with the potential to generate exponential ROI over time.



How Does It Work?

Today's information systems generate an unprecedented amount of data from both digital and physical sources. Process intelligence is a technology which provides businesses with the tools necessary to improve the process—and the outputs—of strategic analysis.

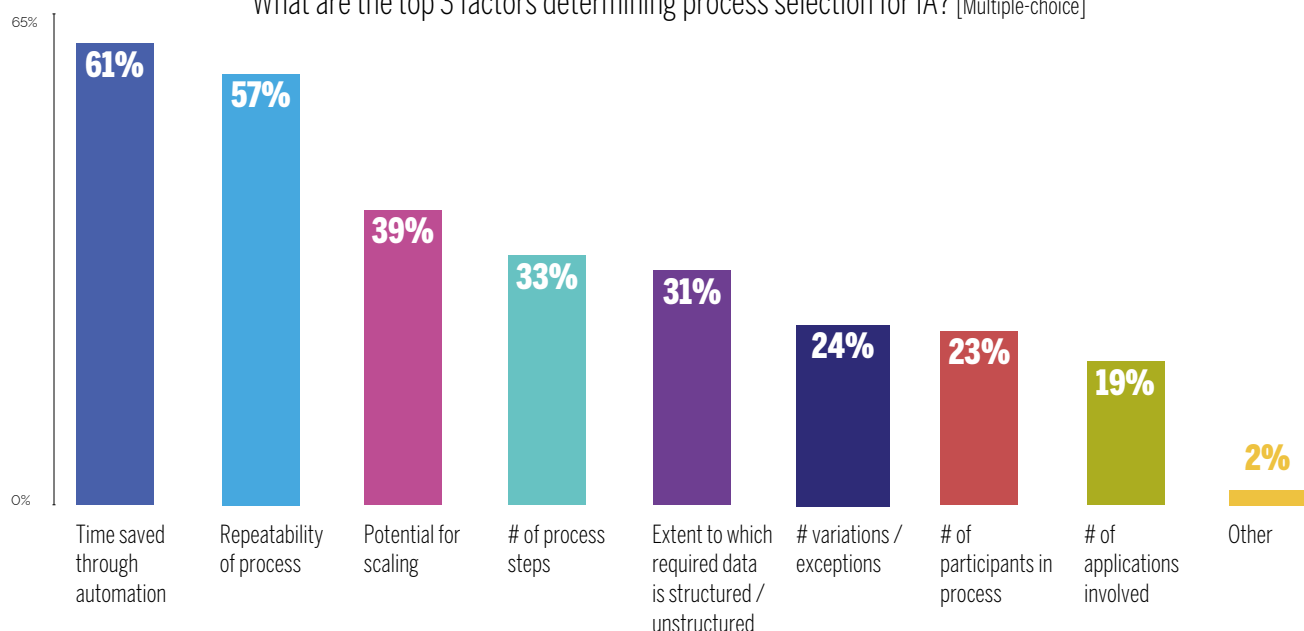
Process intelligence collects, merges, and analyzes a wealth of data to discover patterns and insights that improve customer experience and operational efficiency



Flawless Business Process Execution

Through process intelligence, organizations can more effectively identify deficiencies and opportunities to move the dial towards more efficient process delivery. It empowers enterprises with game-changing insights based on accurate process information about what already exists, who does the work, how long it takes to complete, and the specific gains that could be realized if positive changes were made.

What are the top 3 factors determining process selection for IA? [Multiple-choice]



Source: Global Intelligent automation survey for SSOs/GBS

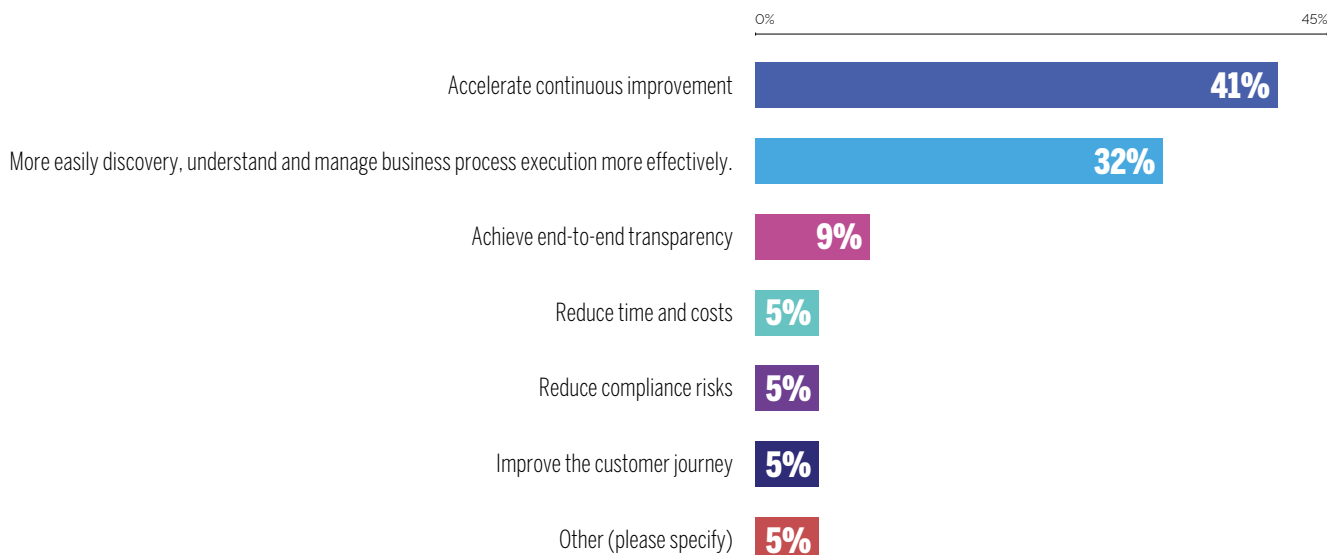
Process intelligence can help organizations iron out where there is repeatability of processes and uncover areas where too much time or not enough time is being spent in certain areas.

Making the most out of our Intelligence

Respondents to SSON's Process Excellence Survey 2021 rank continuous improvement as the top benefit followed by the ability to more easily discover, understand and manage business process

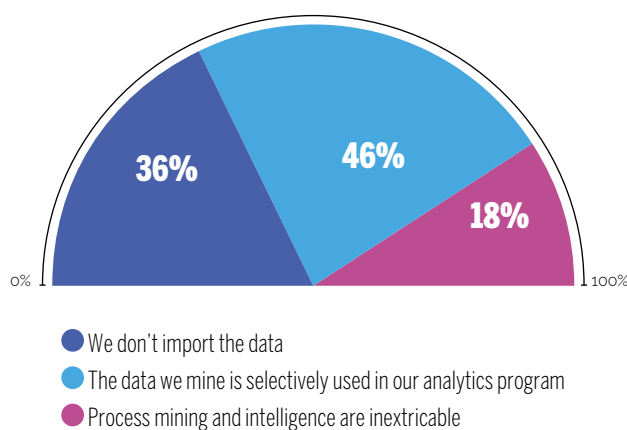
execution more effectively. We also see great opportunity to improve our analytics capabilities by increasingly utilizing the data we mine throughout our analytics programs.

The main benefit of process intelligence and analytics is to:



Source: SSON's Process Excellence Survey 2021

Process Intelligence: How does the intelligence you get out of your analytics feed your process mining program?



Source: SSON's Process Excellence Survey 2021



Top 5 Benefits Of Process Intelligence

Process intelligence has features and benefits that can easily be incorporated into enterprise processes, including:



End-to-end process visualization:

allows enterprises to visualize the flow of work through process stages by illuminating delays, bottlenecks and outliers that can be optimized.



Customer journey visibility:

helps enterprises gain insight into their 'as is' customer processes to understand challenges and discover exceptional cases. This insight can be used to make improvements to increase customer satisfaction.



Reduced time and manual effort:

allows enterprises to eliminate manual process evaluations by delivering faster time to value on process improvement initiatives.



Compliance risk management:

allows enterprises to receive alerts when rules which have been set in place have been broken and following up immediately to prevent the mistake from occurring again.

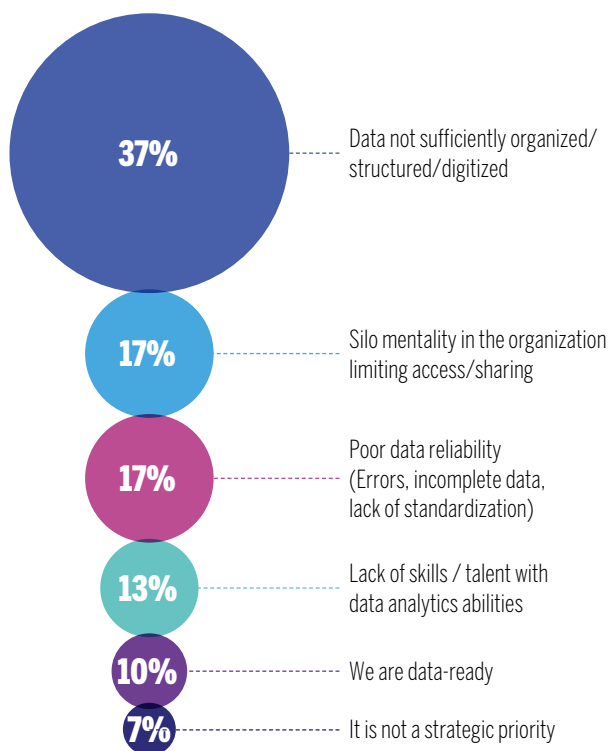


Continuous improvement:

allows enterprises to automatically monitor process performance in real time, assisting in triggering remediation processes or RPA technologies.

Process Analytics: The Secret Sauce for Excellence

If your organization is not currently data-ready, which option best accounts for this?



Source: SSON's GBS and Shared Services State of the Industry Survey 2021

Managing data is becoming an increasingly complex task – involving external, unstructured data, along with internal, structured data. A siloed mentality limiting the sharing of data coupled with unorganized data from multiple data sources prohibits organizations from solving the elusive equation of what to automate when and why.

Process Analytics has the power to gain better insight across your business processes to ensure the *right information* is visible to the *right people* at the *right time* and in the *right context*.

Through process analytics, organizations can drive tangible process improvement with 360° insights that combine and align process discovery data sources in one unified dashboard.

Six Ways Process Analytics Helps SSOs Drive Ultimate Performance:

1. See real results
2. Accelerate RPA strategies
3. Drive process improvement
4. Automate at scale
5. Build test automation
6. Speed digital transformation

Read on to hear how Worksoft, a market leader in process intelligence and analytics is helping SSOs deliver real-world insights to seize the benefits of process automation at speed and scale.



An Expert's Perspective:

Q&A with **Shoeb Javed**, Chief Strategy and Product Officer, **Worksoft**

Q: Why process intelligence and why now?

A: Right now, we're seeing the important convergence of three segments of the market: Digital Processes, Enterprise Applications and Intelligent Automation. The boundaries between these three segments are blurring, with the digital process being increasingly at the center of that convergence. Why is that?

In the past, enterprise applications were key, so you started with SAP or Oracle or Workday or Salesforce, and then designed your processes and automation around the application. Today, it's about starting with digital processes that deliver the right business outcomes and end user experiences, and then fitting enterprise applications and automation as necessary to achieve those outcomes.

Since your process is ultimately what delivers value, understanding, improving and optimizing the process becomes critical. And it doesn't matter whether the process is based on an enterprise application or if it uses automation that you built, or both. It has to be holistic. And there's where process intelligence comes in.

Q: Thinking about process intelligence five years ago and now, what are the differences and advancements?

A: Technology has evolved quite significantly. In the early days the insights gained from process mining and other forms of process discovery were rudimentary, with the technology simply mapping process flows and not much more.

Current process intelligence combines multiple sources of information, including back-end system data, as well as end-user activity, to provide a 360-degree view of process that includes business insights that are truly actionable and valuable.

With this holistic approach, we can derive a much richer level of process understanding. Insights, suggested actions and tangible results that can be gained and tracked make this new level of process intelligence more meaningful for organizations, creating a viable business case to invest in these solutions. When making investments into automation or digital transformation, enterprises can now focus on how to better target their efforts and measure ROI along the way in a more consistent manner.

Q: What are some of the inhibitors when implementing process intelligence and what's your advice for overcoming the hurdles?

A: The information and knowledge of process intelligence exists, but it is siloed and fragmented by business functions and specialized actions. Skilled process experts are available that are pockets of excellence, where people understand the bigger picture, but a lot of companies inherently understand what a better process would mean for them.

It might seem like a daunting task to undertake, to implement process mining or other process intelligence solutions. The key is to pick the most important area first, make incremental progress and then feed upon the successes and ROI achieved to do more. By using knowledge you already have and combining that knowledge with information provided by automated process discovery applications, enterprises can break down silos and create cohesive solutions.

The way you approach process intelligence and automation, in general, is always evolving. The goal is to reach critical mass so that the benefits become significant and fuel further investments and progress.

Q: What are the economic and organizational benefits of the process platform versus combining point solutions?

A: The intersection of digital processes, enterprise applications and intelligent automation yields efficiencies and optimization across the entire process lifecycle. This intersection is critical to connecting intelligent automation with process mining, desktop automation, RPA, and low code for the right outcome.

Q: Do you have any predictions of where process intelligence is going to go in the future?

A: I see a convergence of intelligent automation and enterprise applications with process intelligence. Process Intelligence will be increasingly used to drive cognitive process automation.

This cognitive process automation is more about answering the question of "what does your end user experience look like?" What do your partner, supplier and employee experiences look like and how are you going to evolve your processes to continuously improve it? It is not just about taking the existing process and then automating some parts of it, but about continually rethinking the process itself.

More of the day-to-day operations within those processes will be taken over by the enterprise applications themselves. Therefore, process again, becomes key. Process intelligence and cognitive process automation now becomes more important than the underlying applications, because they can easily be replaced, but the processes itself will not be.



THE POWER OF PROCESS INTELLIGENCE

HVAC LEADER LEVERAGES AUTOMATION & PROCESS DATA TO DRIVE OPERATIONAL IMPROVEMENT

With seamlessly connected process intelligence, test automation and RPA all in one platform, Worksoft's Connective Automation empowers enterprises to take automation to the next level. A leading global HVAC manufacturer has experienced the benefits of engaging Worksoft to drastically improve efficiency and quality assurance, plus identify ongoing opportunities for continuous improvement that maximize ROI. The company's senior QA manager recently shared how Worksoft has had a positive impact.

Improved Process Visibility

Like most enterprises, the manufacturer has an abundance of complex business processes that comprise their supply chain and other mission-critical aspects of their business. Their QA manager says keeping these processes running flawlessly and as expected is not only important for quality assurance, but to support the larger focus of avoiding brand erosion as they consistently meet and exceed customer expectations.

But prior to engaging Worksoft's Process Intelligence, the company lacked visibility into their as-is business processes. They knew at a basic level how those processes flowed but were unable to gain insights into the complexity underneath. Worksoft's Process Intelligence dashboard aggregates information from multiple process data sources to deliver a visual representation of business processes, along with their variants and other key functional data that can be filtered and sorted to support true process understanding and decision making.



"The Process Intelligence dashboard gives us a clear picture of our processes and their performance. With this insight, we can literally see where the holes are. We also get suggestions of the actions we can take next, along with their related financial value. We can determine where to change, where to optimize, and where to automate for maximum returns."

Accelerated IT Initiatives

One of the key areas the company has found value from Connective Automation is in the ability to accelerate the delivery of key IT development initiatives. Using the Worksoft platform enables them to drastically increase productivity and efficiency, cutting the average duration of their large development projects. The manufacturer estimates an incremental cost savings of \$1.1 million from this project acceleration.

"Part of the advantage of automation is the speed in which you can execute. We're able to significantly reduce the time it takes to prepare to move major changes into production. For example, testing for a recent major migration effort that would have taken eight weeks to do without automation took us only a few days."

Collaborative Process Discovery

To maximize ROI from digital process automation, an enterprise needs the ability to scale. Worksoft's Connective Automation enables the global HVAC leader to engage both business users and IT teams in the building of automation with easy-to-use process capture. With no programming skills required, it's easy for the company's teams to quickly become proficient and essentially hit record to capture their step-by-step tasks.

WORKSOFT®

The solution is completely codeless and captures can be reviewed and modified and even used to generate process documentation. And the entire effort of capturing process data is streamlined, without the need for lengthy interviews or time and motion studies.

Most valuable, is that the captured process data seamlessly feeds the Process Intelligence dashboard, creating the instant visibility to their processes to support future action.

"Before we had automated process capture, we would have to conduct interviews and try to piece together the steps in process execution and map out our automation and hope it was accurate. But with Worksoft's process capture, we can record actual steps automatically. It's not only useful for process discovery, but also helps us have better line of sight into our overall process picture."

Drive Test Efficiencies

The organization originally engaged Worksoft to support automated testing, which aligns with their overall company goals to improve efficiency and enhance QA. Now, they can also leverage Worksoft's Process Intelligence to continuously improve their testing operations. The same dashboard enables them to drill down into performance data for automated tests.

"Having the ability to see at a glance how our tests are performing is incredibly useful, especially when we're looking for testing gaps. We have hundreds of tests out there and this technology allows us to visually see what we're testing, how long each test takes, and where we can expand our testing efforts."

For more information about the Worksoft Connective Automation Platform for process intelligence, discovery and RPA, visit worksoft.com.

KEY RESULTS

Global HVAC Leader Reports These Real-World Results from Using the Connective Automation Platform:

209%

RETURN ON INVESTMENT

\$2.7M

NET PRESENT VALUE

90%

PRODUCTIVITY INCREASE

(972) 993-0400

info@worksoft.com

worksoft.com

WORKSOFT®

SECTION FOUR: ROBOTIC PROCESS AUTOMATION...

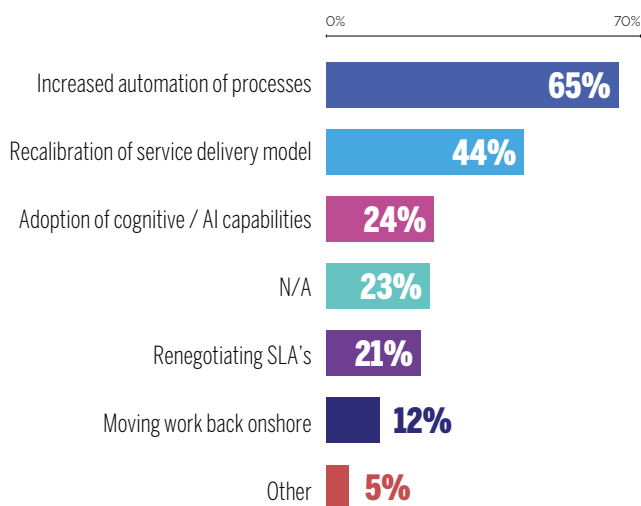


DELIVERING ON THE PROMISE OF PROCESS EXCELLENCE

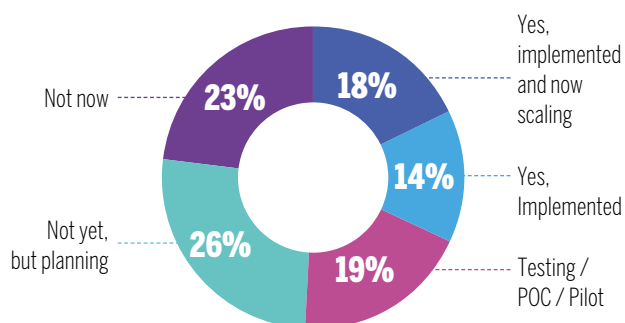
At the beginning of the pandemic, SSON conducted a survey to assess attitudes towards automation and featured the results within the COVID-19 Impact on Global Service Delivery Models Reality Bites Report. When asked what steps were being taken to ensure service levels were maintained, respondents overwhelmingly opted for the increased automation of their processes - almost six in 10 organizations consider this their top priority.

Fast forward to 2021. RPA is now widely implemented in business services, with 51% of SSOs already implementing or currently in the testing/pilot phase. **Now, organizations are taking stock, assessing performance and seizing the opportunity to use process excellence tools to accelerate and scale RPA initiatives.** Since, in many enterprises RPA strategy sits within shared services/global business services, improving processes before automating them is the key to obtaining maximum benefit. The following charts emphasizes the role that RPA is playing—or is planned to play—in shared services organizations, and where the RPA strategy is currently owned.

To maintain service levels, which of the following are you currently considering? [Multiple-choice]

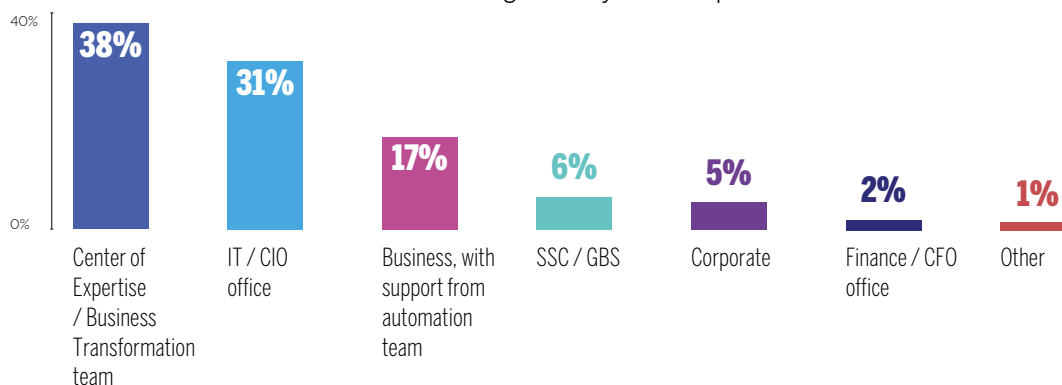


Is intelligent automation (eg. RPA) part of your operations?



Source: Intelligent Automation in modern shared services – a catalyst for opportunities, driving strategy and service excellence

Who owns the IA agenda in your enterprise?

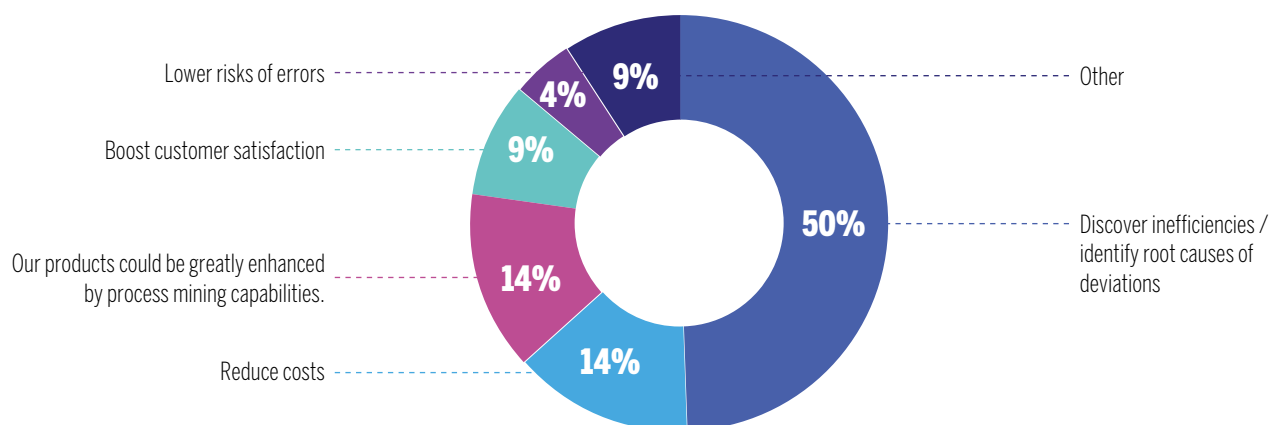


RPA & PROCESS MINING: THE PERFECT MARRIAGE

Organizations are increasingly leveraging process mining to select and optimize the right process to get the most out their RPA project. It's simple: the process of deploying bots is made easier if you have a template outlining the steps conducted by human employees. Process mining makes this possible.

The technology allows you to identify faulty/inefficient processes as well as identify root causes of deviations before automating, which is the greatest advantage for combining RPA with process mining as shown below.

The greatest advantage for combining RPA with process mining is to:



Source: SSON's Process Excellence 2021 Survey



SECTION FIVE: BUSINESS PROCESS MODELING AND DESIGN: VISUALIZING IMPROVEMENTS

Designing Collaboratively

There is a plethora of digital tools available that are more dynamic, transparent, fact-based, and multi-dimensional than the old ways of work shadowing, fishbone diagrams, and process mapping. A well-equipped end-to-end process management organization today has a suite of tools, including analysis and modeling - a key component to effective process management.

Process modeling is the graphical representation of business processes or workflows. It is a tool for designing collaboratively and links the modeling with the workflows. Process modeling provides effective ways to digitally capture business processes, allowing enterprises to take advantage of intuitive features when building process models as well as collaboration with colleagues when improving procedures.



Staying in Control and Improving Output

Because of the visual and graphic nature of a process model, it is a powerful tool that enables business analysts to communicate business rules and requirements in a clear, concise and common manner in a way that text cannot achieve. Users can easily create processes, add new activities, edit and then review models before publishing. Even with thousands of processes, users can stay in control and improve output with extensive editing functionalities.

What Are the Main Benefits of Using Business Process Modeling?

SSOs are increasingly turning to business process modeling for its ability to identify areas for improvement and provide agility and flexibility. SSON market data reveals that driving continuous improvement is a primary goal for business process modeling and that can be achieved through the technology's ability to:

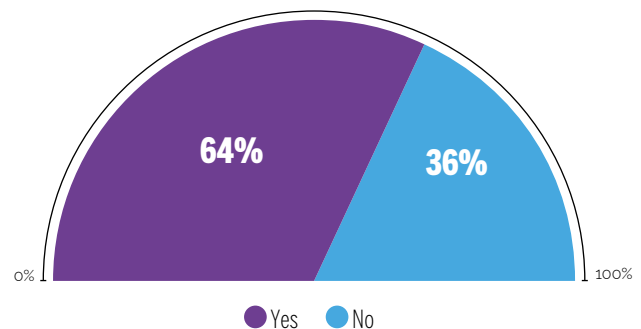
- Provide a transparent view of how the process works
- Provide consistency and control of the process
- Spots and eliminates redundancies and inefficiencies.
- Provide a starting and ending point

When a user has transparency over the full process from beginning to end, it makes it easier to identify areas for improvement and change course as needed.

Process modeling is a vital component of process automation, as a process model needs to be created first to define tasks and optimize the workflow before it is automated.

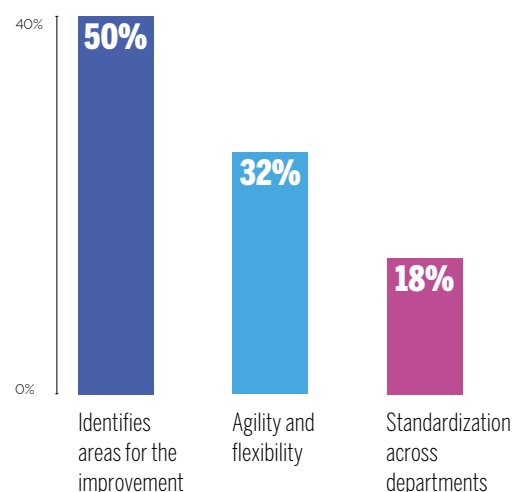
Read on to learn how Signavio, a 'market leader' in business process modeling is helping SSOs improve the way they work, raise standards with collaborative input and feedback, simulate processes for alternative business scenarios and keep tabs on projects before publishing.

Do you use business process modeling?



Source: SSON's Process Excellence 2021 Survey

What is the biggest benefit of business process modeling?



Source: SSON's Process Excellence 2021 Survey



An Expert's Perspective:

Q&A with **Candace Collins**, Americas Marketing, **Signavio**

Q: What are some specific uses of business process modeling in shared services and GBS?

A: Signavio is the leading solution globally to offer the power of modeling and mining to define and monitor the Order To Cash (O2C) process. We help customers Increase operational efficiency, optimize Days Sales Outstanding (DSO) and reduce Total Cost of Ownership (TCO), while improving omni channel efficiency, compliance, and collaborative efforts. Signavio supports better process execution, governance and monitoring, so credit / invoicing systems are under control while consolidating supplier touch points. Our customers are able to measure and boost the pulse of their order-to-cash cycle and sales performance.

An example of the process:

Customers can quickly and simply model one of the most critical processes in their organization, to build a clear picture of the interactions, areas of responsibility, and connecting tasks spanning multiple systems, operations, and business areas. They are able to get the strategic overview needed to optimize O2C process, and increase the speed and efficiency of the entire business.

Customers are able to discover cost and efficiency savings hidden within their O2C process. They can eliminate rework, identify bottlenecks, and ensure all staff have the resources to complete their tasks most efficiently.

With one click of the 'Create' button, customers can start BPMN models, Customer Journey Model initiatives, process mining investigations, and more – all while collaborating like never before.

Q: How has the tool advanced over the last few years?

A: In recent years, the focus of BPM has shifted to the customer. In this 'age of the customer', businesses are recognized BPM tools as the technology that can drive automation, collaboration and engagement with customers. We see BPM as a part of the new intelligent enterprise, which is an agile and rapidly-adaptive enterprise with intelligent data and empathy. An intelligent enterprise has access to vast amounts of data internally and externally which is all connected. This enables employees and customers to make decisions quickly and to achieve their best.

Success Story

How Process-Driven Cross- Training Helped Driscoll's Face the Challenges of COVID-19

A New Way of Working

The COVID-19 crisis meant unprecedented challenges for businesses worldwide. As our ways of socializing and working drastically changed in just a matter of weeks, companies navigated their way through uncertainty with a focus on what is most critical to them. In many cases, new ways of thinking were required, as well as reinventing business models, securing new supply chains, and more.

Any new approach needs a clear, precise process management framework that takes into account the critical tasks within an organization's key functions, and is resilient and robust enough to cope with change. This combination is the essence of how the Signavio Business Transformation Suite helps organizations navigate the 'new normal'.

Driscoll's: An Integrated Approach

Driscoll's is a family-owned company with over 100 years of experience delivering Only the Finest Berries™ to consumers around the world. The company's stated mission is to "continually delight our Berry Consumers through alignment with our Customers and our Berry Growers." In pursuit of this goal, Driscoll's takes an integrated approach to the entire life cycle of their product, from breeding and growing to marketing and sales.

The company employs over 1,300 people in regular full-time (RFT) positions across the globe, as well as a fluctuating seasonal workforce. Driscoll's employees work in eleven countries, split into five business units: four with main operational responsibilities in a geographical area (the Americas, EMEA, Asia-Pacific, and Australia/New Zealand), and one operating with responsibilities across those geographies.

Driscoll's aims to keep the berry supply chain as convenient as possible by efficient planning and coordination, as well as maintaining effective communication across their workforce. To support their integrated approach, Driscoll's models and manages

their key processes using the Signavio Business Transformation Suite. Driscoll's has identified a range of benefits of using the Suite, including:

- > Shifting from ad-hoc, activity-based processes to a "Process Aware" mindset
- > Improved support for process owners
- > Financial benefits arising from increased efficiency and reduced costs
- > More defined roles and responsibilities
- > Ability to scale processes to match company growth



SIGNAVIO CASE STUDY



Response to the COVID-19 Crisis

Like many organizations, Driscoll's faced a range of challenges related to the COVID-19 crisis. Given the nature of their business, a particular priority was ensuring critical business processes could still be completed in the face of widespread staffing shortages caused by the global lockdown and quarantine efforts.

To solve this problem, the company resolved to implement a system of cross-training critical roles. By upskilling staff so they could fill different positions than their usual responsibilities, Driscoll's could continue executing their core processes, and maintain their high standards of customer service.

To prepare for the cross-training program, the company followed a four-step approach, where each business unit:

- > Analyzed core processes and process owners;
- > Identified critical roles that support core processes that needed back-up staff ;
- > Identified available human resources (and skills they possess) in non-critical roles; and
- > Created a cross-training matrix based on best fit between critical and non-critical roles.

In creating their cross-training matrix, Driscoll's was able to rely on the Signavio Business Transformation Suite to supply the process information needed to upskill their staff.



How Process Management Helped Build a Cross- Training Framework

Below are the key areas Signavio was able to help Driscoll's respond to the COVID-19 crisis. Processes & Data

Processes & Data

When determining which critical roles needed to be cross-trained, Driscoll's based their decisions on which core processes most impacted customers. The starting point was the value chains and processes already documented within Signavio Process Manager. The company was also able to use existing process models to analyze the minimum staff requirement to execute the core processes, as well as ensure that backups were identified for crucial staff positions.

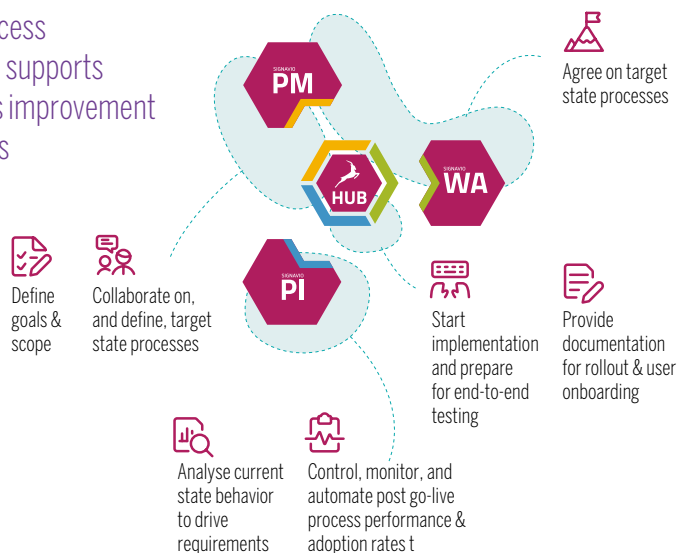
Organization & Documentation

Once Driscoll's moved on to actually cross-training staff, the process documentation housed in Signavio Process Manager served as the foundation of the training efforts. Having process models available to trainees before, during, and after training also meant every process was carried out consistently, and trainees taking on new roles had a 'single source of truth' to refer to. This was a particularly useful support for staff in transactional positions; other roles benefited from decision models outlining various scenarios along with ideal outcomes.

Communication & Collaboration

In any crisis situation, frequent and effective communication is vital to maintaining morale and a shared commitment to success. Driscoll's was able to use the Signavio Collaboration Hub as a built-in communication channel to not only provide process model information in support of their cross-training initiative, but also to explain the risks they were working to avoid, and the detrimental impacts if cross-training did not take place.

A solid process framework supports continuous improvement at Driscoll's



In essence, using the Modeling and analysis tools within the Signavio Business Transformation Suite, Driscoll's had a clear understanding of how their processes operated, precise knowledge of which processes were mission-critical, and immediate oversight of process owners across the company. This meant Driscoll's was able to quickly and smoothly pivot to a cross-training program, even in the midst of a crisis, because the company's underlying process framework was solid – thanks to Signavio.

SIGNAVIO CASE STUDY

Five use cases, one software solution

The Signavio Business Transformation Suite is the only solution to unleash the power of Live Insights to help organizations of all shapes and sizes get the most out of their processes. With intelligent process mining, companies reduce costs, optimize performance, and safeguard their competitive advantage.

With next-gen collaborative capabilities, business knowledge propels process-driven transformation based on conclusive end-to-end process evidence. This way, you navigate case scenarios by unlocking the persona information, visibility, and quantifiable numbers needed for continual growth and customer excellence (CEX) imperatives.



Operational Excellence (OpEx)

Signavio enables organizations to model their current processes, from new customer onboarding to payment processing, and discover a more efficient way of operating. Harnessing the power of process management with dynamic, customizable dashboards, and process analysis/mining capabilities helps improve the end-to-end transparency of business processes. Signavio swiftly harmonizes operations and business decisions across different departments and business functions.



ERP Transformation

Signavio easily standardizes processes across your entire organization, including different business units and geographic locations. Assess the usefulness of your company's legacy systems, and update them where appropriate, as well as discovering other opportunities to improve your IT infrastructure and business/IT alignment. Search, create, and share tasks with upgraded collaborative Signavio capabilities.



Robotic Process Automation (RPA) at Scale

Process automation with Signavio helps cut down on repetitive work, reduce human error, and detect and eliminate incidences of non-compliant process behavior. Analyze your business processes to identify opportunities for automation, or optimize existing processes in preparation for RPA implementation at scale. Harness the integrated human and robot working loop for managing process excellence and transformation strategies.



Mapping the Customer Journey Operational Excellence (OpEx)

Expectations are changing, and organizations worldwide need to change operational perspectives by looking towards the customer via an integrated 360-degree journey technique. Signavio journey mapping is essential across all personas, not just the customer, including patients, citizens, employees, and the end-user. Put these process perspectives at the heart of operations, identify contact points, and drive customer excellence (CEX) initiatives.



Risk & Compliance

Managing risk is fundamental to companies, globally. Signavio helps build a stable and consistent process environment, meaning compliance violations can be detected, and risks responded to rapidly. Signavio lets you simulate scenarios, test controls, and improve your organizational response times with fully automated conformance checks—making complex manual reporting a thing of the past.

Almost 60% of companies incurred payment charges from suppliers due to process inefficiencies

SUMMARY

Today's trend is toward the unification across the process excellence suite: technology, organization and methods. Historically, each category contributed to an improved business outcome (e.g., higher productivity and lower cost), but didn't achieve the business outcome alone.

- Process discovery, task mining, and process mining helped document and visualize processes to identify improvement opportunities against a reference process model
- Process modeling (typically in business process management systems) helped simulate alternative improvements
- RPA helped automate and augment work done by humans
- Process intelligence (e.g., cognitive) created prescriptive and preventative improvement actions

All of the above technologies require skilled people organized in the right way using the right methods to generate the full business outcome.

The focus now is unifying the various pieces to deliver a business outcome. The next future trend is likely the unification of process excellence and experience excellence suites.

ABOUT CELONIS

Celonis is the world's leading process mining company. The innovative big data technology applies machine learning across all company data to provide full, unbiased visibility into all business processes, uncover bottlenecks, and provide prescriptive recommendations on how to eliminate them effectively. Enterprises in over 25 countries trust

Celonis to visualize, analyze and maximize the efficiency of their operations. Celonis is based in Munich with offices in the U.S. and the Netherlands.

www.celonis.com



ABOUT SIGNAVIO

Signavio is a forward-thinking business transformation software company delivering value to customers through intuitive, collaborative business process and decision management, and workflow automation solutions.

Signavio enables companies of all industries to gain greater efficiency and operational agility, empowering better management of risk and compliance in the face of increasing

regulation while capitalizing on opportunities. Signavio's solutions are ideal for your strategically important alignment, transformation and automation projects.

Intelligent decision making facilitates consistent, reliable service to customers, and social and communicative features put people at the core of the business.



ABOUT WORKSOFT

Founded in 1998 by Linda Hayes, Worksoft has evolved from the industry's leading continuous test automation platform for Enterprise Packaged Apps to the premier provider of Connective automation for the world's leading global enterprises, automating the full lifecycle of a business process from automated process intelligence to testing to RPA.

Our 100% codeless automation empowers business users and IT to participate in automation, arming organizations with process data insights to prioritize and optimize automation efforts as well as extend automation value with RPA for maximum efficiency and scalability. With Worksoft,

enterprises can speed project timelines and ensure data-driven quality for their complex end-to-end business applications, including SAP, Oracle, Salesforce, Workday®, SuccessFactors, ServiceNow, and more. Recognized by leading Global Systems Integrators as the market's choice for large-scale continuous enterprise automation, Worksoft is embedded into their ERP practices to enable Agile, DevOps, and SAFe methodologies and accelerate digital transformation. Our team continues to build on our legacy and reputation for superior automation through constant innovation.

www.worksoft.com



ABOUT THE SHARED SERVICES & OUTSOURCING NETWORK (SSON)

The [Shared Services & Outsourcing Network \(SSON\)](#) is the largest and most established community of shared services and outsourcing professionals in the world, with over 180,000 members. Established in 1999, SSON recognised the revolution in support services as it was happening, and realised that a forum was needed through

which practitioners could connect with each other on a regional and global basis. SSON is a one-stop shop for shared services professionals, offering industry-leading events, training and certification, market studies, reports, benchmarking, research and analytics, surveys, and more.

