



Getting Started with Process Intelligence

A Comprehensive Guide for PEX
Professionals

The Challenge

For today's businesses, process excellence isn't a choice. Faced with growing challenges, like rising operational complexity, increased competition, and new regulations, businesses must be able to adapt and transform – often in the face of rapid change. Given such challenges, it's no surprise that many businesses are turning to process optimization tools.

But, while these tools can and do add value, without a deeper understanding of how best to use them, businesses miss out on the opportunity to add value to their process landscape. Instead, many invest in optimization approaches that provide limited scope for addressing their problems. This leaves their transformation efforts, and the process excellence (PEX) professionals that lead them, frustrated and without the tools, grounding, or guidance they need to ensure success.

With this guide, we offer a straightforward, systematic, and integrated strategy for process excellence. We discuss the tools needed for success at every stage, and how to take stock of and use existing business resources. We also discuss why true process intelligence is vital for every business, and explore how to use a “discover, design, optimize” approach to ensure real, lasting, and continuous process improvement in any business.

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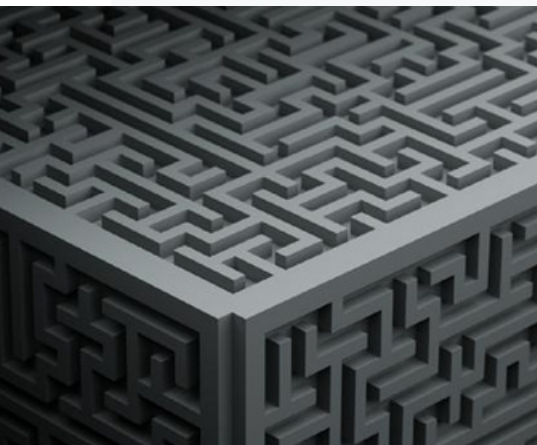
Chapter One

Establishing the “Why”

It may seem obvious, but the first question you need to be able to answer before embarking on any process excellence journey is also the most significant: Why are we doing this?

In the broadest sense, the answer is that a business is the sum of its processes. The most successful businesses are those that have an in-depth understanding of how their processes play out in real-time. They can shape and proactively adjust their processes to meet incoming needs in a way that empowers them to achieve true operational excellence.

Put another way, good processes build lasting transformation and lasting value. Poor ones incur costs – whether financially, through lost opportunities, lost productivity, reputational harm, or simply in terms of the company’s ability to position itself at the cutting edge of its industry.



A related question any business should ask when embarking on its process excellence journey is: What do we hope to gain from this? Answering this question requires drilling a little deeper into core aspects of the company’s process landscape.

In general, every process initiative will focus on one (or more) of the following aspects:

- Improving productivity,
- Reducing costs, or
- Ensuring compliance.



The first question you need to be able to answer before embarking on any process excellence journey is also the most significant: Why are we doing this?

Which of these considerations are most important depends on the nature of the industry and individual processes.

For example, for a bank using a new system to process loan applications, the top consideration will almost certainly be compliance. Are all the steps in the process being followed correctly? Are all the checks and balances in place? Does the loan application make all the correct stops for approval along the way?

For a sales process, the overall priority may be boosting productivity. Specific goals could focus on shortening the sales cycle and boosting the deal win rate, or implementing some degree of automation to allow individual sales reps to handle more accounts.

Building Value Iteratively

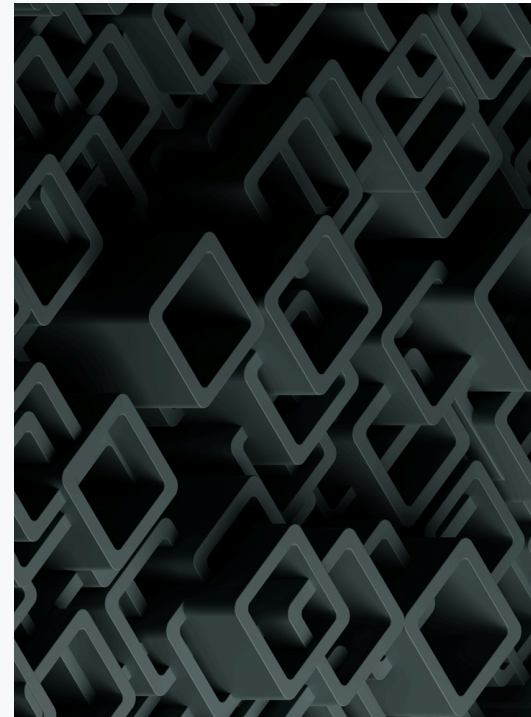
Establishing your “why” right from the start, as well as ironing out some of the details, sets your process optimization efforts up to be successful. It also helps you break away from vague overarching goals to more specific, actionable ones.

For example, you know that the bigger picture in business is to improve productivity, and that process intelligence can help you get there. But, that’s a very broad goal. If you deploy a process improvement initiative aimed at “improving productivity,” chances are you’ll quickly find yourself stuck and unsure how to proceed.

A better approach is to focus on a specific smaller initiative that builds toward that greater context. Choose one process, or part of a process, and focus on improving its productivity. Once you’ve proved the efficacy of the approach in that smaller instance, you can scale up, rolling out process optimization initiatives to adjacent processes or sets of processes.

Another important part of proving efficacy is to define how success is measured right from the start. What are the Key Performance Indicators (KPIs) you will use to demonstrate success? Which objectives and key results matter to the people working with this process? And how are you going to quantify that those results have been met?

It may seem like those considerations are really “getting into the weeds” during what should be an early strategic stage of planning, but that’s the point. The more you can demonstrate the value of process intelligence right from the start, the more likely you’ll get the buy-in to roll out a much larger initiative.



Tapping into the Process Story

Another key part of demonstrating value lies in recognizing that process improvement initiatives don't exist in a vacuum. There is context and business architecture built around every process. Knock-on effects and impacts radiate out from the changes made.

Most importantly, there are people involved with these processes. Whether it be customers interacting with your sales process or employees enacting process changes, the way your processes run has a direct, qualitative impact on how the company is perceived.

Demonstrating value requires taking all of these factors into account, as well as ensuring that you understand the full process story associated with the changes you want to make.

Additional questions worth bearing in mind include:

- Who is involved in each stage of this process?
- Who is Responsible, Accountable, Consulted, and Informed (RACI)?
- How do the proposed changes affect these teams and individuals?
- What other processes are impacted?
- Which existing systems need to be considered or integrated?
- And how can those systems be leveraged as part of this initiative?

You should also consider how process changes play into broader company goals or strategies. For example, aside from performance, can process improvements add value to the company's sustainability efforts? Small changes, like digitizing or automating process steps, might have the added benefit of reducing material waste. Larger changes, like the gains from streamlining and improving an entire supply chain, could drastically bolster the company's sustainability bottom line.

By considering these impacts, and the full context of the processes you work with, the process changes you deploy add value. Importantly, aligning processes with broader strategies and objectives also boosts buy-in from different stakeholders, especially if your improved process taps into a project or objective they already consider valuable.

Now, none of this is to say you need to have everything mapped out before making the first change. Chances are, you'll find the answers to many of these questions later, as you discover your process. And, as mentioned previously, process improvements are iterative. It takes time to figure out what works, and the initial changes may need to be refined or even reworked in the face of new data.

However, what you should keep broadly in mind as you establish your “why” is that:

- Your process improvement journey includes many factors. It isn't simply an academic exercise in building the “best process,” and
- Different stakeholders hold different perspectives, so the value of new process intelligence initiatives may not be immediately obvious to everyone involved.

Therefore, a successful transformation initiative should include strategies for generating buy-in, a plan for integrating existing resources and objectives with new solutions, and a surefire way to build and demonstrate the lasting value that process intelligence brings to the business.

Chapter Two

Establishing the “Who”

Once you've established the “why” of your process intelligence initiative, the next step is establishing which stakeholders you need to convince to take that initiative forward. Two broad questions you should ask at this stage are:

- Who are the people involved in the processes you're trying to improve?
- And what do they want?

If you're a process excellence (PEX) professional, or even just your company's go-to “process person,” the answer on your end is easy. You want processes that run smoothly and efficiently, and that allow the company to make the best possible decisions. You know that investing in process intelligence and optimizing processes ensures your company remains competitive.

However, as we touched on in the last chapter, to deploy new process initiatives at scale, you will need to get buy-in from other stakeholders in the company. And each of them has their views, preferences, beliefs, and objectives, all of which impact how they value and view a specific process.



Who are the people involved in the processes you're trying to improve and what do they want?



Point-of-view in Process Excellence

To illustrate this principle, let's step outside of the corporate framework for a minute. Think of how this plays out in a pizza restaurant. If you're a customer coming to collect a pizza, chances are the factors you care about are whether your pizza is fresh, tasty, and on time. You're probably not interested in the equipment the chef used to make it, what kind of flour they used, or where they sourced their ingredients. But to the chef, those points are far more relevant. They want to use the best tools to make the best pizza.

Meanwhile, the restaurant owner has other priorities. Sure, they care that what comes out of the kitchen is fresh, tasty, and made with good ingredients. However, their primary concern is whether the pizza-making process is running smoothly enough to keep the business making money. Otherwise, the other considerations become irrelevant.



In a corporate context, the same logic applies. You need to understand the viewpoint of everyone involved in a process, including the viewpoints of executives that can greenlight a process roll-out at scale. For executives, an obvious point of value is the metrics that they themselves are measured on from a strategic perspective.

The company's Chief Revenue Officer will be interested in the bottom line: How do these process changes impact metrics like Annual Recurring Revenue?

For sales team members, process changes should address their pain points and improve their quality of life. Implementing changes like sales automation may reduce the number of tasks they need to complete manually. In turn, that should make it easier for individual reps to manage the accounts they're working on and build meaningful relationships with clients. Additional considerations for this team might be how these improvements impact their ability to earn commission and their job security.

Meanwhile, for the IT team, there are other considerations. Will the new process break anything in terms of security and existing systems? Is it difficult to implement or easy to integrate? To what kinds of vulnerabilities might it expose the company? And if there's already an existing solution: Why do we need this shiny new one?

You can't account for everyone's concerns and viewpoints at every turn. However, going into your process optimization effort with some idea of different viewpoints and the resistance you might encounter will make it far easier to select an appropriate process intelligence solution – one that addresses concerns right out of the box and can provide the kinds of metrics you need to sway people to your side.

Importantly, though, metrics shouldn't be considered the be-all-and-end-all of process improvement. As a PEX professional, it can be tempting to fall back on the numbers and methodologies like Lean and Six Sigma to demonstrate the value of a process improvement approach.

These tools do provide a robust way to measure each step of an initiative and offer a rigorous approach to executing change. Ultimately, however, meaningful and lasting change is about changing human behavior. And few people will be motivated purely by mathematics!

Getting Buy In

It's also worth remembering that getting buy-in for your process intelligence plans isn't simply a "one-and-done." You'll need to engage with people in the long term, get them to talk to you about their processes, and get buy-in for each new initiative. You also need people to meaningfully change their behavior to support long-term process improvement.

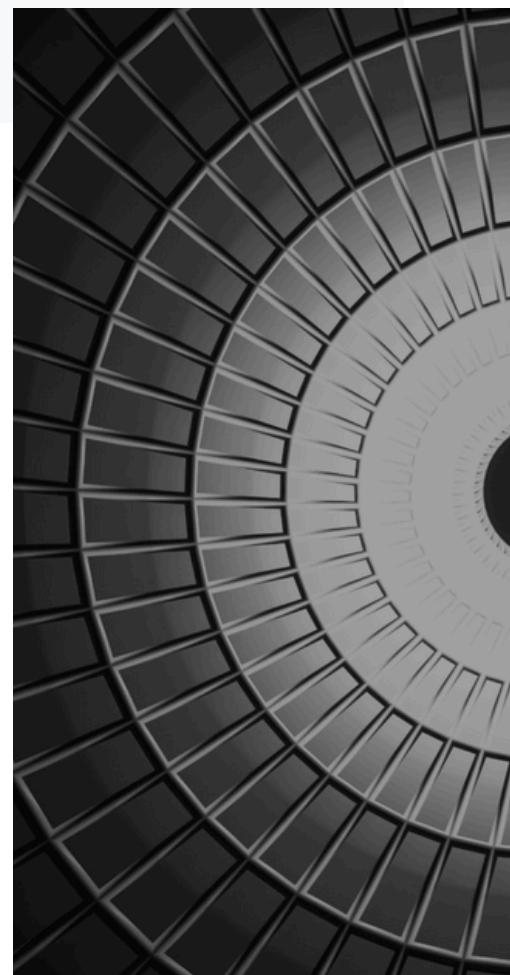
Understanding different stakeholder viewpoints is a great starting point to achieve those goals. But, it's also important to be sure you speak the same language as the people you work with.

This might include how you frame process change in the first place. Cultural differences between regions (and within workplaces) can influence how ideas are received.

In some places, this may mean being direct and clearly stating: "There's a problem with this process. Here's what we need to do to fix it."

In others, it may be a better approach to steer clear of identifying process problems and to focus on opportunities for improvement instead: "There's a more efficient way to run this process. Here's what we'll gain if we make some changes."

Understanding these kinds of differences, and how best to frame an improvement initiative, can mean the difference between getting your program funded and watching a brilliant idea fall by the wayside. It can also radically boost your chances of successfully improving your company's process landscape in the long term.



Demonstrating Process Excellence

A good tool in the toolbox when it comes to getting buy-in is being able to easily demonstrate exactly what you're talking about. A platform that's easy to use, understand, and navigate can go a long way toward convincing stakeholders that an initiative has merit. This is especially true if you can also demonstrate real value by giving them a "quick win" in terms of a small but meaningful process improvement.

Put another way: It's a lot harder to convince members of your C-suite to invest in a process intelligence tool that costs hundreds of thousands of dollars and takes a year before producing any results. Therefore, a good process intelligence platform should make it easy to demonstrate results and alignment with the priorities of all relevant stakeholders. In short, it should do some of the heavy lifting of convincing them for you.



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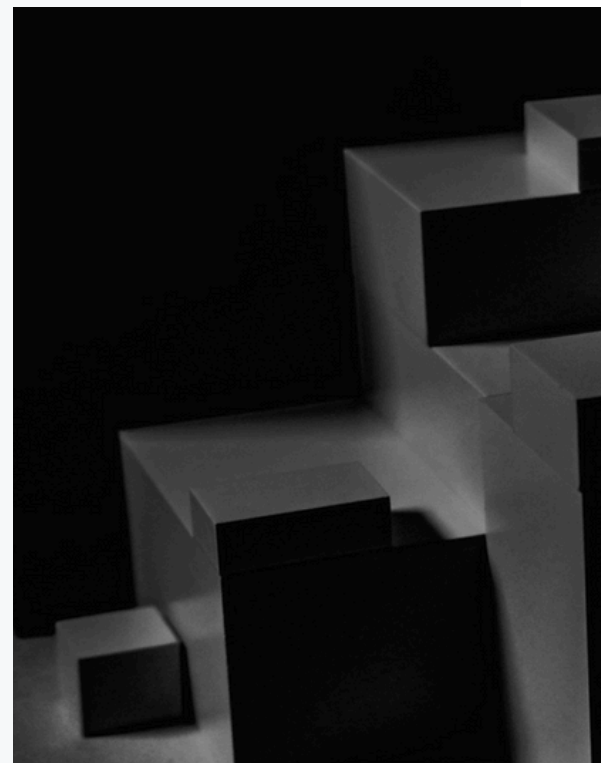
Chapter Three

Taking Inventory

With your "why" and "who" clearly in mind, it's time to start taking inventory.

- What resources are available to you?
- What core systems and solutions are already in use?
- What applications are people already using?

Naturally, the answers to those questions will depend on where you are in your process maturity journey. If your company is in the very earliest stages of process improvement, there might be very little to work with in terms of existing resources and systems. Or perhaps your company has already invested a great deal, but the results have been subpar.



Avoid Reinventing the Wheel

Part of the importance of taking inventory is ensuring that you aren't reinventing the wheel. If there are existing resources and systems, there are good reasons for trying to find ways to use them.

Firstly, it may simply be a waste of time and energy to replace existing systems. If the company already has business intelligence tools, it's often more efficient to leverage them, or their data, to inform your process intelligence efforts.

The second reason to think carefully about how you work with existing systems is that trying to replace them may cause friction. In many cases, those systems are someone's "baby." That may mean a project that they've championed through the years, or even a career-defining choice that they implemented based on the best available information at the time. You're not going to get very far by calling their baby ugly. Or telling them they need a new one!

Taking Inventory of Existing Technology

With the above in mind, a good starting point for taking inventory is to take stock of existing process tools – especially ones actively used across the company. Examples might be:

- Diagramming tools like Visio or Lucidchart,
- Robotic Process Automation (RPA),
- Low-code Application Platforms (LCAPs),
- Business Intelligence (BI) tools, and
- Core systems: GRC, CRM, ERP, ITSM, etc.

If your company is already using some of these tools extensively, common objections you might hear from others are: "But we already have Business Intelligence. Why do we need this?" Or: "We already have RPA and a diagramming tool."

"A key point to remember is that having a collection of process tools is not the same as having a full process intelligence solution".

True process intelligence allows the business to optimize processes end-to-end, build the ideal versions of processes, and address the core pain points of cost, compliance, and efficiency.

Additionally, process intelligence adds value to the tools that are already there. For example, if the business is already spending money on RPA, it's worth emphasizing that process intelligence can boost the performance and value RPA delivers. On its own, automation simply makes processes faster.

But if there are underlying issues in the process, this may just be throwing gasoline on the fire! Process intelligence grounds automation by making it smarter, without the business needing to spend more money on RPA.. And the resulting value add makes it easier to garner support from the people most invested in the RPA tool.

Another common example is the conversion of static business process diagrams into live process models that can be used by other systems. Many existing diagramming tools don't conform to Business Process Modeling Notation (BPMN) standards, meaning their outputs can't be easily translated into the standardized format needed to use them in process optimization initiatives.

A good process intelligence tool can solve that problem by converting process diagrams into a BPMN structure. This allows the business to use its existing information to further process optimization efforts. It also adds an extra utility layer for stakeholders already invested in creating useful process diagrams.

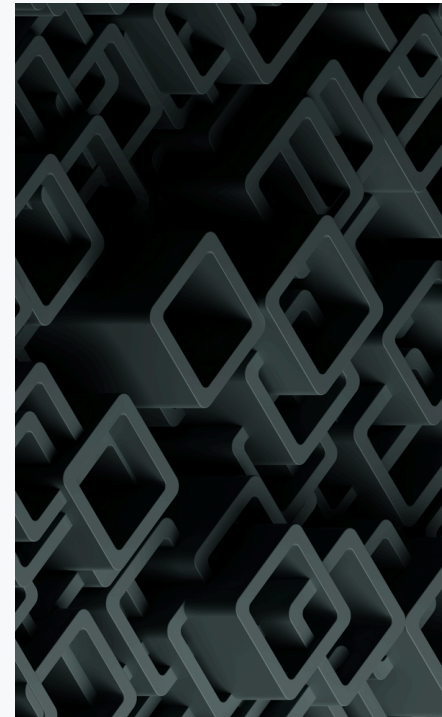
Taking Inventory of Human Capital

The second consideration when taking inventory is the people in, and associated with, your company that hold the relevant knowledge to move a project forward. We've already touched on process and tech "owners" above – the individuals and teams already invested in specific aspects of process or process tools. Less obvious sources of process knowledge and support include:

Seasoned team members: These are people that have been with the company a long time, are deeply familiar with its process landscape, and can, therefore, provide invaluable domain expertise. This is especially important in cases where processes, or parts of processes, are siloed in different teams. The people who have been on those teams the longest are the perfect collaborators to get you started with understanding their processes.

Company consultants: Another great source of information and advice is consultants who already have extensive domain knowledge and know the frameworks you'll be working with inside and out. Taking note of the projects with which those individuals are already involved, and positioning yourself as an ally, can be free visibility for your own efforts.

Innovation champions: Finally, note members of other teams that are coming up with bold new ideas and approaches. These are often people you can engage to support your own efforts. For example, if you know someone in marketing has almost convinced their team to use GenAI for generating advertisements, hop on their bandwagon and see if you can broaden the scope for some of your purposes.



An important point to remember when you start gathering information and working with different individuals across the company is to keep your approach principled and objective. This means trusting what people say, but also verifying it to ensure you're getting all sides of the picture. Often, the way someone thinks a process works isn't how it actually works. So, wherever possible, use data to validate your hypotheses about this.

Along the same lines, try to avoid making assumptions about the progress of others' process optimization efforts. Instead, focus on thinking critically about their efforts so far. Do they have any data to show the progress they've made? And if they've hit roadblocks, think about how you can help to tear these down, while adding value to their efforts with process intelligence.

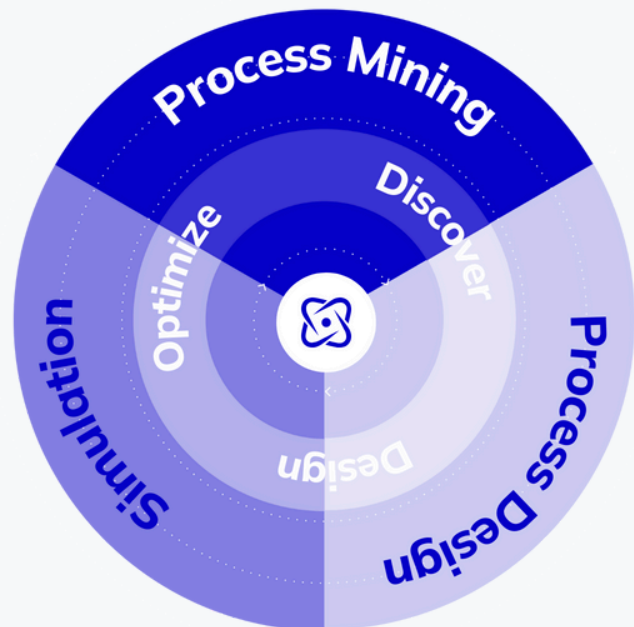
As you move through the inventory-taking process, it's possible that the answers to some of the questions posed throughout this section are: "I don't know." That's perfectly fine. The point is to be as transparent as possible about the information and resources you have available as you head into the next steps of your process optimization journey.

Chapter Four

Process Discovery

Alright, you've completed some initial thinking around your process landscape and taken inventory of the resources and people available to support your process intelligence goals. Now, how do you go about actually changing your processes?

In the next three chapters, you'll learn a practical three-step approach – **Discover, Design, Optimize** – for maximizing success in your business's process optimization journey. In addition, you'll explore the tools and capabilities needed to support your efforts at each stage



Discover Your Process

The first step on your process discovery journey is identifying which process (or set of processes) you initially want to work with. This might mean tackling an entire macro-process, like source-to-pay, or it might mean targeting a smaller section of that process, like accounts payable, as a “proof of concept” that you can scale up later.

Whatever you choose, keep in mind the principle of delivering a “quick win” to demonstrate the value of process intelligence and increase the chances of getting ongoing buy-in for your project.

With your candidate process identified, it’s time to document and virtually recreate that process. At this stage, you’re just trying to replicate how the process currently runs. In other words, your goal is to model the process exactly as is.

To do so, you’ll need to look at individual process steps and how they fit into the whole. You’ll also need to examine their context, connections, and interdependencies with other processes. The tools you’ll need to accomplish this are **process mining** and **process modeling**.



Discovering Process Data with Process Mining

For many companies, process mining is one of the initial entry-points into process intelligence. Not surprising, given that one of the major benefits is how much time a mining tool can save. Instead of spending countless hours conducting interviews and workshops, often with a payoff of inaccurate data, a process mining tool speeds up data-gathering dramatically.

Using process mining, you can begin to dig into the specifics of how a process runs using data already available in the company’s systems, for example, timestamp data that tells you how long each step in the process takes.

What’s important at this stage is for the data you gather to be as detailed and accurate as possible. Ideally, you should have time stamps available for both the start and end points of each process step, and you should be able to identify when steps are running in parallel instead of sequentially. This helps you avoid the pitfalls of oversimplified analysis, highlights opportunities and allows you to later optimize your process accurately and impactfully.

Worth noting is that many process mining tools fail to capture this kind of granular detail, so it’s worth shopping around for one that meets these requirements.

With the data gathered during mining, you can generate process maps that allow you to identify bottlenecks, inefficiencies, as well as to start looking for opportunities to improve processes, boost compliance, and cut costs during the design stage.

Adding Context with Process Modeling

The next step in discovering your process is to add context by modeling all the additional factors that aren't captured with mining alone. This helps you to avoid overlooking pertinent details, like decisions made during in-person meetings or (worst case) parts of the process that are still tracked on paper. In other words, the type of data that might not be captured in the systems you've mined.

Using process modeling, you start adding this metadata to your process and answering some of the questions posed in the initial stages of this guide. For example: Who are the people involved at each step of this process? What are their RACI roles? And with which systems and regulations is this process or step associated?

Adding this context is vital to understanding your process landscape and how a process runs in reality. It also ensures that you're taking account of all the factors that could affect process efficiency.

Ideally, your process map with all this additional information should be stored in a central process repository. Essentially, this is a process database where multiple processes are stored and where they can be tagged, linked, updated, and cross-checked with one another. This allows you to build a more comprehensive picture of your process landscape over time. It also shifts your model from a static diagram to a living representation of your process.

Digging Deeper

A point worth mentioning here is that, for many companies, efforts at process improvement stop after process mining. They find the inefficiencies in their processes, revise them, and move on. A few might introduce additional tools like automation to help speed up specific process steps.

Many might not get as far as modeling their process in context. Still fewer have a plan for continuous improvement or a way to monitor the outcomes of changes and ensure they have improved the process.



This is often where process optimization efforts get derailed. While the changes made may work for a while, they eventually end up out of sync with the growing business. In the worst cases, they may even cause unanticipated knock-on effects or bottlenecks elsewhere in the company.

This is again where we see the difference between process improvement tools and actual process intelligence. Through process intelligence, the business gains the ability to answer a host of additional vital questions, such as:

What does the ideal version of this process look like? And how do we ensure continuous process improvement?

Chapter Five

Designing Your Ideal Process

With your process discovered and accurately documented, it's time to move on to the first of the questions posed above: What is the best version of this process? To answer that, you'll need both **process modeling** and a new tool: **process simulation**.

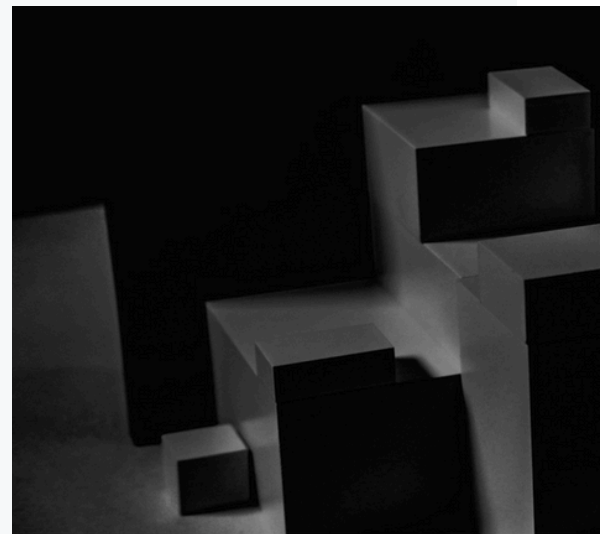
Designing the Ideal Version of Your Process

Using the information gathered during process mining, and your “as is” process model, you can now start proposing ideas to improve your process. The goal of the design step is to try to create the best version of your process, one that encompasses how the process should run under ideal circumstances.

During this stage, you will be thinking through opportunities for improvement, testing your ideas, and creating the blueprints for future changes. So, the questions that should be posed at this point are: How can this process be improved? And: How can the problems and bottlenecks in this process be avoided?

Some ideas for how to improve the process will come from your mined data. For example, you might identify “best practices” by benchmarking process performance between teams or regions. Other ideas will come from various stakeholders in the company.

A key consideration during the design stage is that the process of ideation should be collaborative. Everyone involved, and especially those you've invested time and energy in recruiting to your side, should have a say.



To facilitate this collaboration, you should try to select a tool or platform that:

- Houses your process models centrally, including all of the context you mapped out during process discovery
- Allows you and selected members of other teams to easily make and document proposed changes, and
- Presents the results from your mining and modeling efforts in an easy-to-understand format.

This allows members of other teams, including those that lack technical know-how, to participate in the design process, giving you access to a broader field of expertise. This may include members of your risk and compliance team, your center of excellence team, and other line of business teams. Other ideas may come from high-level stakeholders (i.e., members of your C-suite), or from team members you've already recruited during the "Taking Inventory" stage.

The point is, by making the design step collaborative you ensure other team members are also invested in process change. This in turn makes it more likely that you'll get their continued support and future buy-in. As you design your process, you should also keep in mind the three core considerations touched on in Chapter One:

- Does this change improve productivity and efficiency?
- Does this change help ensure compliance with internal policy and external regulations?
- Can this change help us cut costs?

Chances are that several of the ideas that you've gathered through collaboration will in fact improve at least one of these outcomes. But which ideas will move the needle the most? And do any of them cause any unforeseen consequences?

Simulating Process Outcomes

With ideas for how your processes can be improved firmly in mind, it's now time to test different versions to see which ones deliver the desired outcome. And here again we come to a common pitfall encountered by many businesses during their process improvement initiatives.

In the preceding chapter, we discussed the case where a business has mined data, identified a challenge, and revised the process to try to fix the problem. They now implement these changes live and await an expected result. However, when this new process doesn't work as expected, the result can be frustration with process improvement tools and a sense that the tools haven't delivered on what was promised.

Businesses fall into this trap because they've skipped key steps in their process intelligence effort. By skipping process design and opting to test their processes live, they've taken on risk without quantifying what the actual outcome is likely to be.



A process simulation tool solves this shortfall by allowing you to test out the different improvement ideas posed during the design step. This is when you can start weeding out poor ideas from good ones by objectively comparing the performance of different versions of the process. What this means practically is you can now see, before deploying the process live, which new version of a process solves the problem you're trying to address, as well as which versions create new bottlenecks.

This data-driven approach also means no-one is going on their "gut feel" of which ideas are good ones and which are bad ones. Everyone involved during the design stage can see the results for themselves, including how their idea performed compared to others.

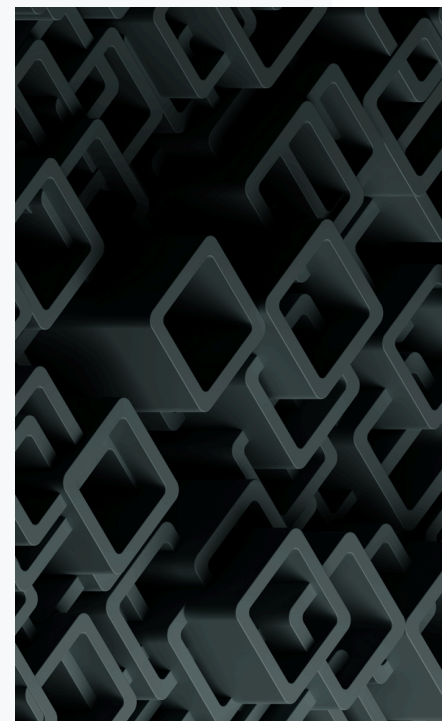
You can also compare benefits against costs, allowing you to articulate exactly which trade offs will occur with each version of the process. This is vital for generating buy-in from executives who generally need to know exactly what they're signing up for, how much it will cost, and what they'll get out the other end. Even better if you can provide a couple of options to choose from, with the benefits of each clearly articulated.

Ensuring Accuracy

Importantly, the data you gather during the simulation step is only as good as the original data gathered during process mining. This is part of why it's so important to ensure your mined data goes into granular detail. For example, you shouldn't have to guess how long a customer service call lasts. Your mining tool should be able to capture that data, and accurately document the start and end time of process steps. It should also be able to identify where processes are occurring in parallel instead of sequentially.

A mining tool that fails to accurately account for those factors is likely to generate data that is limited in its usefulness and that results in process models that aren't accurate enough for you to confidently simulate their outcomes. This need for accuracy and detail is also the reason why you need to capture the context of your processes during process discovery. If you are running a simulation for a process that has regulatory requirements attached to it, like responding to insurance claims, your process must be based on clear guidelines for what an acceptable response time is.

To sum up, the data from mining (and to a lesser extent the context added during modeling) should give you an accurate baseline of how your process runs. An important step in your simulation process is therefore to first run a simulation based on your "as is" data. If you were guessing at factors like process step durations or probabilities, it's going to show here. You can compare known data points in process mining (cycle times, case counts, variation probabilities, etc.) with what the simulation baseline produces to make sure it's accurate.



Once your baseline is accurate, you can confidently run future state simulations based on process improvements. This also makes it less risky to present your ideas to high-level stakeholders, because you know that your simulated process improvements are highly likely to produce the results you're expecting.

Putting it All Together

By this stage you should have a solid idea for which process improvement ideas are working, and which ones aren't. Using the information you've gained from your simulations, you can now finalize the ideal future state of your process.

Here again, you'll be using a process modeling tool, but in this case the goal is to incorporate the best improvements to your process to create the ideal version. In other words, you can finally create the blueprint for the version of your process that you'll run live.

Case Study: A Misstep in Process Improvement

Okay, now let's examine an example where the above methodology wasn't followed. Think of the case of a call center trying to improve its customer service after noticing that their customer satisfaction scores are worryingly low.

Using process mining, the call center discovers that the waiting time before calls are answered is around 15 minutes.

That's far too long, and most customers hang up before speaking to an agent. To solve the issue, the company settles on a simple solution. They hire new staff to increase the number of people available to answer calls, with the result that wait times rapidly drop from 15 minutes to 3 minutes.

Over time, however, they realize that this hasn't solved the issue. In fact, their customer satisfaction scores are still almost as low as they were before despite the addition of so many agents. The company now has to figure out what's gone wrong and must handle the fallout of an increasingly poor reputation.

Realizing that something has clearly been missed, the company investigates the context around customer dissatisfaction more closely.



They quickly discover that part of the original problem was that around one in five calls were being escalated to senior agents, because junior agents weren't able to adequately handle complaints. Adding even more junior agents to the mix has exacerbated the problem, and now one in three calls are escalated, with the upshot that customers are still on hold, waiting for a senior agent to attend to their call.

In other words, they've created a bigger bottleneck down the line, without solving their customer satisfaction problem.

Had the company modeled its process in more detail, including the context of who was answering each call, they would have figured this out much sooner. They could then have designed and simulated potential solutions to ensure their solution was effective, picking up the potential for a bottleneck before it ever occurred. This in turn would have prompted a more effective solution: Like hiring additional senior agents in a ratio that ensured there was nearly always someone available to escalate calls to.

They would also have been able to examine the costs of different options, so they could make an informed decision about the tradeoffs and impacts the company faced in implementing its solution.

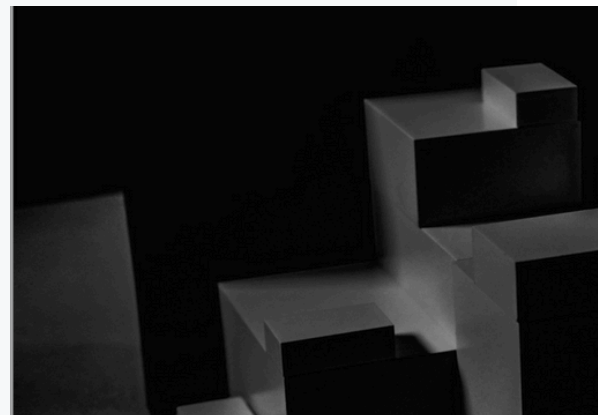
This is a simple example, and most business problems aren't this clear-cut. In most cases, reaching an ideal version of a process will require additional work to optimize and refine what's already there. But of course, that's a lot easier to do if you start from an accurate baseline.

Chapter Six

Optimizing Processes

With your new and improved process designed, simulated and modeled, you're finally ready to deploy it in real life. If everything goes well, it should run as intended, saving the company resources and time, and putting your optimization efforts on a few C-suite radars.

What many businesses fail to realize, however, is that, at this stage, the job still isn't done. To ensure your process is running as intended, and that you haven't overlooked anything during the other stages, there are a few additional capabilities and considerations to keep in mind.



Monitoring and Measuring Your Process

The first of these is the need for consistent **process monitoring**. Remember those metrics you defined during the early stages to quantify success for different stakeholders? The goal of process monitoring is to find out whether your process changes have reached the KPIs and results you outlined.

Adding a process monitoring tool to your process intelligence suite allows you to accurately measure the success of your process improvement initiatives and quantify how your new process runs.

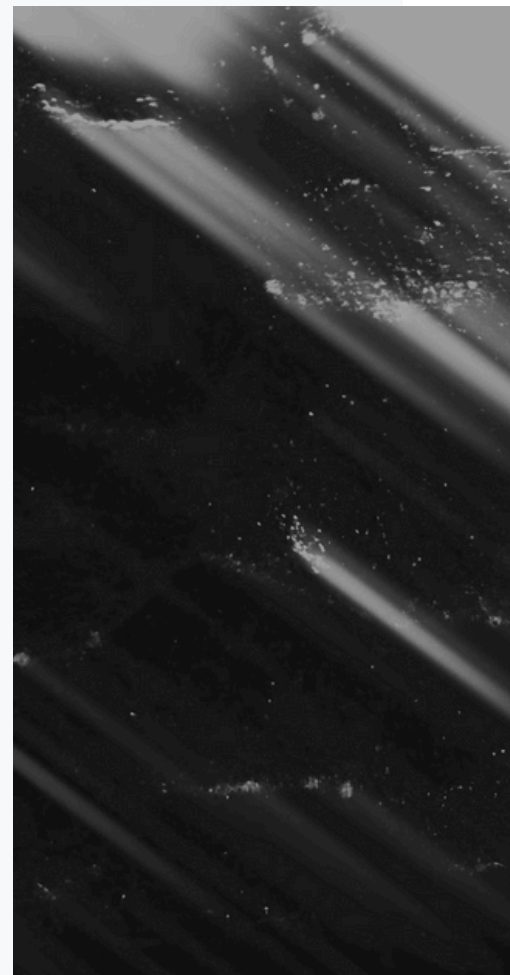
Importantly, monitoring should be happening on an ongoing basis. A mistake many companies make is to run a new process over weeks or months before they take stock of how it's performing. As a result, any negative trends or bottlenecks occurring in the new process go unnoticed until they become bigger problems.

This puts the company in a position of always reacting to problems at a delay, and can cause reputational, financial, and productivity risks.

There are also unforeseen risks and changes that are impossible to predict, which can all impact how a process performs over time. For example, a key employee leaving the business, diverted resources, or a botched system upgrade that creates a new bottleneck in the process.

What the company should be aiming for is to catch issues early. To do so requires monitoring processes in near-real time – that is, relevant metrics should be monitored and updated according to the frequency that makes sense for your business, whether that's weekly, daily, or to-the-minute.

It's also helpful to have key metrics displayed via a dashboard that can be easily accessed by all those involved in the process. This ensures everyone stays informed and can flag any risks or concerns specific to their team. It also allows you to respond to issues as they occur, and to quickly iterate on, and improve your process.



Augmentation and Integration

Another factor in optimizing your process landscape is whether the tools or solution you want to implement can be integrated with what you already have.

In earlier chapters, we discussed the need to take inventory of the process tools your company is already using, as well as the idea that certain tech and systems might be “pet projects” of others in your organization.

Choosing a process intelligence solution that can be easily integrated with popular systems, like LCAPs and automation, can make it much easier to get buy-in from others in the business, especially if you can add value to what they’re already doing.



Adding Analytics

A final capability that should be in every PEX professional’s process optimization toolbox is: **predictive analytics**.

Predictive analytics adds machine learning capabilities to process intelligence. This allows the business to learn from patterns in past data to identify potential issues before they occur and flag them so the process can be redirected.

For example, if a process is likely to follow a specific pathway that would result in an order being delayed, an algorithm trained on that process can create an alert before things go awry. Or it might identify a risk that could result in a process being non-compliant.

In other words, this is like having a crystal ball that empowers your business to make the right calls before things go wrong. This allows the business to shift its stance from reactive to proactive.

Creating a Continuous Improvement Environment

The preceding chapters have covered a wide range of the capabilities and ideas needed to transform your process landscape into an overarching value-add for your business. But, for a PEX professional starting out, this may seem like a lot to take in and implement all at once.

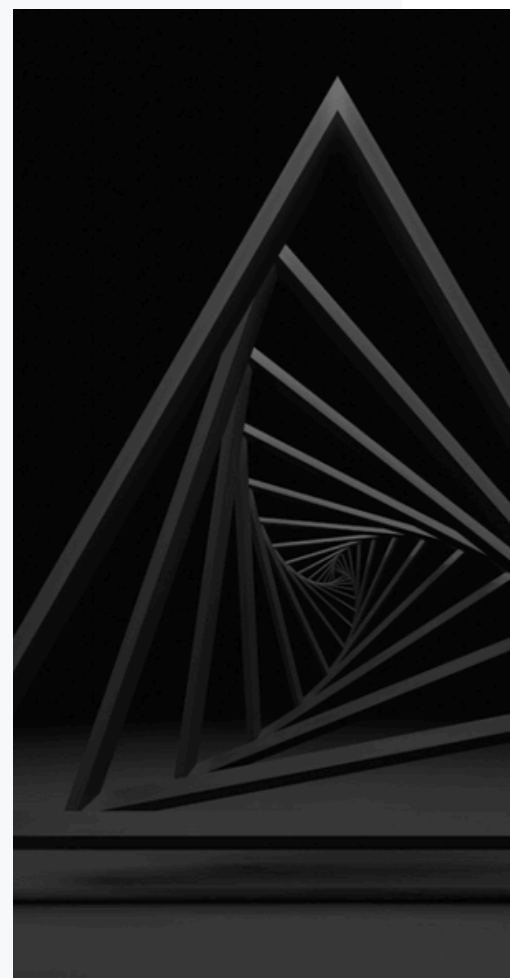
The beauty of a process intelligence approach, however, is that it can be scaled up as needed. So, start with something simple, then expand and apply what you've learned to a bigger process or system. This allows you to test your ideas and then build your process landscape in a way that makes sense for your business.

What's important is that you follow a systematic approach – one that prioritizes including relevant stakeholders and then discovering, designing, and optimizing your process in a way that adds value for everyone involved.

As you work, also keep in mind that processes aren't static. No matter how well your process is running right now, over time your business environment will change. Your processes will need to be adapted and improved to maximize the benefits gained at every stage.

This idea of continuous improvement is at the heart of what true process intelligence has to offer. Using this approach, your business moves away from the idea that a process can be mapped and optimized in one sitting and then left to run the same way in perpetuity.

Instead, the continuous improvement enabled by process intelligence empowers the business to embrace a new paradigm, one that supports it to achieve long-term success by recognizing your process landscape for what it truly is: a living, breathing set of systems that must be adapted, improved, and reimagined in sync with the changing needs of your growing business.



Interested in learning more about how process intelligence can transform your business? Read through our [whitepaper on process mining essentials](#), or explore a range of process intelligence topics on the [iGrafX blog](#).

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