

## User Process Improvement Assessment

What does User Process Improvement mean to you?

User efficiency > **Increased capacity**

> **Higher revenue**

Better visibility > **Less waste**

> **Lower costs**

More control > **Procedural adherence**

> **Better compliance**

> **Improved customer satisfaction**





# Process Discovery

## Process Discovery Yields Opportunities for User Process Improvement

In the pursuit of quality and efficiency, numerous programs and tools have been developed and refined. Some companies embrace formal methodologies such as Six Sigma and Lean. Others implement team-based concepts like total quality management (TQM), Quality Circles and Kaizen. These are increasingly supported by business process management (BPM) software and other tools to formalize the project and provide a technology foundation for a quality program.

It is generally agreed upon that true quality requires a transformational way of thinking inside an organization, and there is no one-size-fits-all approach. It is not a finite series of steps with a beginning and an end, but rather a quest for continuous improvement. At a granular level, this journey is composed of countless process improvements that are designed, implemented, measured and refined, over and over again, across the enterprise with continually more amplified results.

Whatever approach your organization uses, one thing is certain. You must begin with a period of process discovery. You need to fully understand the myriad people-processes that take place every day inside your organization—what your knowledge workers do, how they do it, who does it best, and where the inefficiencies and risks lie in each process.

Lack of visibility into (and control over) these user processes can equate to missed opportunities to generate additional sales, to reduce operating costs, to ensure compliance and to enhance every customer interaction.

Through process discovery you will reveal opportunities...

## Your Improvement Opportunity

### Your Minimum Improvement Opportunity

In virtually any environment where you have a group of workers performing similar tasks, you will have a subset which consistently outperforms the rest. Imagine the impact on productivity if you could elevate the performance of all your knowledge-workers to the same level your very best performers are achieving today. Imagine how that could impact sales and customer service levels.

You can. We call this your Minimum Improvement Opportunity (MIO), and consider it just the first step on your process improvement journey.

To determine your MIO, you must monitor how user processes are performed today. When you analyze how different workers use their desktop applications to perform various tasks, the shortcuts and efficiencies that top performers have discovered will become clear. These best practices can then be replicated across the rest of the workforce, through automations and process guidance. The impact of these User Process Improvements alone can be astonishing.

But you can do more...



## Gaining Executive Support

### Computing ROI – Monetizing Opportunities

Identifying and prioritizing further process improvements is the next step. OpenSpan's ability to track and analyze user activities on the desktop has been described as "the next-generation time and motion study." This capability makes OpenSpan a natural fit for organizations exploring User Process Improvement initiatives and quality programs.

But identifying needed User Process Improvements, while important, is not enough to guarantee the success of a continuous improvement program. You will need executive support for your efforts. Of course, a financially defensible plan outlining the expected ROI from proposed improvements will be key. OpenSpan offers several assessment resources to help you build your case.

# User Process Improvement Assessments

## The Self-Assessment: What is Your User Process Improvement (UPI) Score?

For a general idea of where your organization stands with regard to User Process Improvement, we suggest you begin with the online UPI Self-Assessment. This brief online survey analyzes basic information about your environment to calculate an overall UPI Score.

The UPI Score, a composite made up of a User Process Status grade and a Process Improvement Readiness grade, sheds light on the current state of your user processes and your organization's readiness to engage in a formal process improvement initiative. To calculate this score, the self-assessment analyzes basic information about current user processes, such as the number of users performing repetitive tasks, the number of disparate applications used, the number of screens accessed, and manual tasks performed during each workflow. It also considers other variables, such as whether you have a preferred quality methodology and trained staff in place, the level of executive support for a quality program, any BPM tools in place. Upon completion of the self-assessment you receive your UPI Score and an initial set of high-level User Process Improvement recommendations customized for your organization.

## Customized User Process Improvement Assessments

Because many customer-facing and back office processes are complex, labor intensive and context-driven, they are often difficult to reliably document and analyze. Occasionally, internal stakeholders are emotionally vested in certain outcomes, making it difficult to objectively measure process effectiveness. And it often requires cross-departmental interviews to form a complete picture of all process impacts on the organization. Therefore, observation and evaluation by a third-party process expert is often the most effective means to discover User Process Improvement opportunities.

OpenSpan has assembled a team of User Process Improvement professionals who can work with you to identify and roadmap high-value candidates for User Process Automation. Proficient in Lean Six Sigma and other quality programs, these professionals understand the end-to-end implications of business processes and quickly identify the benefits obtainable through process change and automation. They will perform a personalized onsite User Process Improvement Assessment and document the

"as is" and projected "to be" state of your key user processes. The assessment will focus on identifying "Service Wastes," a concept familiar to adherents of the Lean Six Sigma methodology, which might include delay, duplication, unnecessary steps, unclear communication, lost customer opportunities and errors.

## Two types of Customized Process Excellence Assessments are available:

### Basic UPI Assessment (One Day Engagement)

The intent of this engagement is to identify and prioritize a short list of high-value User Process Improvements and to quantify the expected financial impact of those improvements. Thus building a case to support a User Process Improvement initiative.

The engagement includes a day of onsite observation and interviews with key process stakeholders. Upon completion of the engagement, a custom Benefits Assessment document is compiled which includes recommendations for a phased roll-out of key User Process Improvements. These recommendations are based on the conditions within the observed environment, your preferred methodologies and available resources, and the complexity of the use cases and environment. The phases are assigned following Lean principles, and are defined in order to drive highest value for effort expended in rapid succession.

### Objectives

- Understand operations, line of business, and common business functions
- Document business goals, drivers and KPIs
- Review technical environment and training practices
- Identify critical workflows and process value paths
- Observe user processes – monitor a variety of skill groups, user functions, and experience levels
- Identify and obtain agreement on potential improvements that can be accomplished during a 1–2 day Proof of Concept

*(Note: Many of our customers undertake the Basic UPI Assessment as the first step in a formal "Proof of Concept" (POC) during their product evaluation process. In that scenario, the improvements identified are built by OpenSpan Solutions Architects and deployed in a limited setting as part of the POC.)*

## The Sigma UPI Assessment (Multi-Day Engagement)

During the Sigma UPI engagement, an OpenSpan Solutions Architect and a User Process Professional will perform a review of your enterprise operations, including onsite observation and interviews with key user process stakeholders. Upon completion of the engagement, a custom Benefits Assessment document is compiled. The document includes recommendations for a phased roll-out of key User Process Improvements based on the conditions within the observed environment, your preferred methodologies and available resources, and the complexity of the use cases and environment. The phases are assigned following Lean principles, and are prioritized in order to drive highest value for effort expended in rapid succession. This approach will help gain executive support and user acceptance—both of which are necessary for success.

As part of the Sigma UPI engagement, your teams and user processes will be analyzed to highlight inefficiencies and performance gaps. OpenSpan's user process consultants will help you map a path to close performance gaps and improve productivity across the board. The goal is to elevate team performance to new highs which approach the levels your best performers are achieving today. All observed areas will be documented, and improvement recommendations will be provided for each observed user process.

The assessment will estimate the level of effort for implementing the recommended changes and will quantify the expected impact of most (but not all) of the recommended improvements in both time and cost savings per interaction. You will receive all computational spreadsheets produced during validation, which can be leveraged as continuous improvement tools.

### Objectives

- Understand and document operations/lines of business and common business functions
- Document business goals, drivers and KPIs
- Review technical environment and training practices
- Identify workflows and process value paths
- Observe user processes – monitor a variety of skill groups, user functions, and experience levels
- Identify and obtain agreement on potential improvements, identify universal processes which can reduce variation
- Map the progression toward more universal activity to aid aggregation of work groups, simplification of workflows and development of a unified desktop environment if desired
- Document and report findings in a manner corresponding to the User Process Improvement activities conducted (generally communicated in Lean Six Sigma terms, but can be adapted to TQM, Kaizen, or other quality measures)





## Next Steps

### Request a UPI Assessment

Our consultants look forward to talking with you about your environment and specific challenges. When we know more about your goals and current situation with regard to User Process Improvement, we can help you determine which UPI Assessment will offer the greatest value for you. To discuss which UPI Assessment is right for your organization, please contact us at [info@openspan.com](mailto:info@openspan.com) or call +1 678.527.5400.

## About OpenSpan, Inc.

At OpenSpan we make users more efficient and give organizations greater control over processes with an iterative methodology for ongoing user process discovery, analysis and improvement. With OpenSpan you can monitor, analyze and automate user processes either standalone, in conjunction with existing BPM and BAM tools, or as part of a Six Sigma initiative. The resulting productivity gains position organizations to drive more revenue, ensure compliance and improve every customer interaction.



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