



Research Institute

Transformation Journey Case Study

Background

Our client is a large research institute with over 4,000 employees and approximately \$1bn in annual funding for government projects. Having adopted a program of continuous improvement, the institute was seeking to transform its systems and operations over a multi-year initiative.

Challenge

Like many large organizations, our client's legacy operating models were underpinned by dated technology. Following a sustained period of organic growth, there was an evident lack of process ownership and standardization.

Here are two examples. First, the process for pulling data together was disjointed and frequently wouldn't meet sponsor requirements for reporting. Second, the system for travel was outdated and still relied upon paper printouts as part of the bookings and approvals process. The net effect was driving inefficiencies and inhibiting best practice when setting up, running and supporting research programs.

Setting a strong foundation for change

With this as the backdrop, the institute set-up an internal Business Transformation Office (BTO) to drive improvements across its business technology and operations.

The BTO consisted of a cross functional, cross-hierarchical group of process and IT stakeholders, covering change, technology and communications.

The team's mission was to enable state-of-the-art research by:

- Operationalizing enterprise processes such as new employee onboarding, travel processes, contingent labor hiring and management, business intelligence, decision support and recording the "as is" of all of the Laboratory's business processes
- Streamlining data access and creating data architecture and governance
- Standardizing metrics and reporting
- Modernizing business systems and core technologies (including ERP, travel management and office support tools)
- Reducing complexity through establishing ownership and metrics
- Improving staff capabilities, and
- Creating a foundation that would evolve into a mode of continuous process improvement



Early on in the transformation journey, the team recognized that the cost of upgrading systems, such as the ERP, would be significant. So to invest wisely, they needed to focus on the right areas and processes. However, many departments did not have documented or standardized processes--without this the team would not know where to start, and could potentially end up recreating the bad practices they were trying to eliminate.

To address this knowledge gap, it was agreed that the BTO needed to understand how the institute operated today. Specifically, they wanted to identify the core processes, pain points, bottlenecks and capability gaps. This knowledge would then be used to define the priorities and how the upgraded systems would be used.

Taking a structured approach, the aim was to use process levels (see box) to organize and prioritize the order of work. With the structure established, each level was to be worked through in stages.

In the first year, the aim was to establish levels 1 to 3. This was expected to be an intensive period of mapping processes, assigning ownership, and evaluating these processes to identify the ones that need change. Year two would see the start of the process to identify opportunities for improvements and the systems that will support the changes.

On the people side, a change management program and communications plan was set-up to ensure that the benefits of the changes were clearly explained (e.g., it's about creating bandwidth for people to do more high value work) and the teams were supported to adopt the changes.

With a baseline in place, it was time to move onto sourcing, implementing and utilizing a solution that would meet all their process discovery and design needs.

Choosing the right process change management solution

To understand how the organization was operating today, the team set out on a journey to source a tool that would enable them to capture today's ways of working and help them design the future processes.

The evaluation process consisted of:

- Research¹ into the leading players in the market
- Creating a rubric with requirements such as the ability to capture existing and model new processes (incl. data flows and master data store); link process models to operating models and systems; collaborate with peers and stakeholders; create sharable documents; maintain process libraries and use BPMN standards
- Detailing additional requirements around security and storing data in the cloud

Following the initial evaluation, our client shortlisted two solutions and invited them to create a proof of concept. Both tools were trialled for two weeks, before a final decision was made. In all, the review process took four months, at the end of which the team recommended BusinessOptix; a decision that was approved by the COO and key stakeholders.

Process Levels

Level 1: Departments

Level 2: Group and/or sector

Level 3: Processes

Level 4: Activity steps

Level 5: Detailed tasks



“BusinessOptix was chosen because it was the best tool for the job. The company was very responsive; they put senior people forward in discussions and offered up their teams for in-depth product reviews. We were able to get specific needs met and, during research, discovered that in addition to business process modelling, BusinessOptix enabled linking of strategic initiatives to the processes. This meant we could institutionalize a way of working across the organization”

¹Research included looking at Gartner Enterprise Business Process Analysis Market Guide and speaking to analysts

Using BusinessOptix

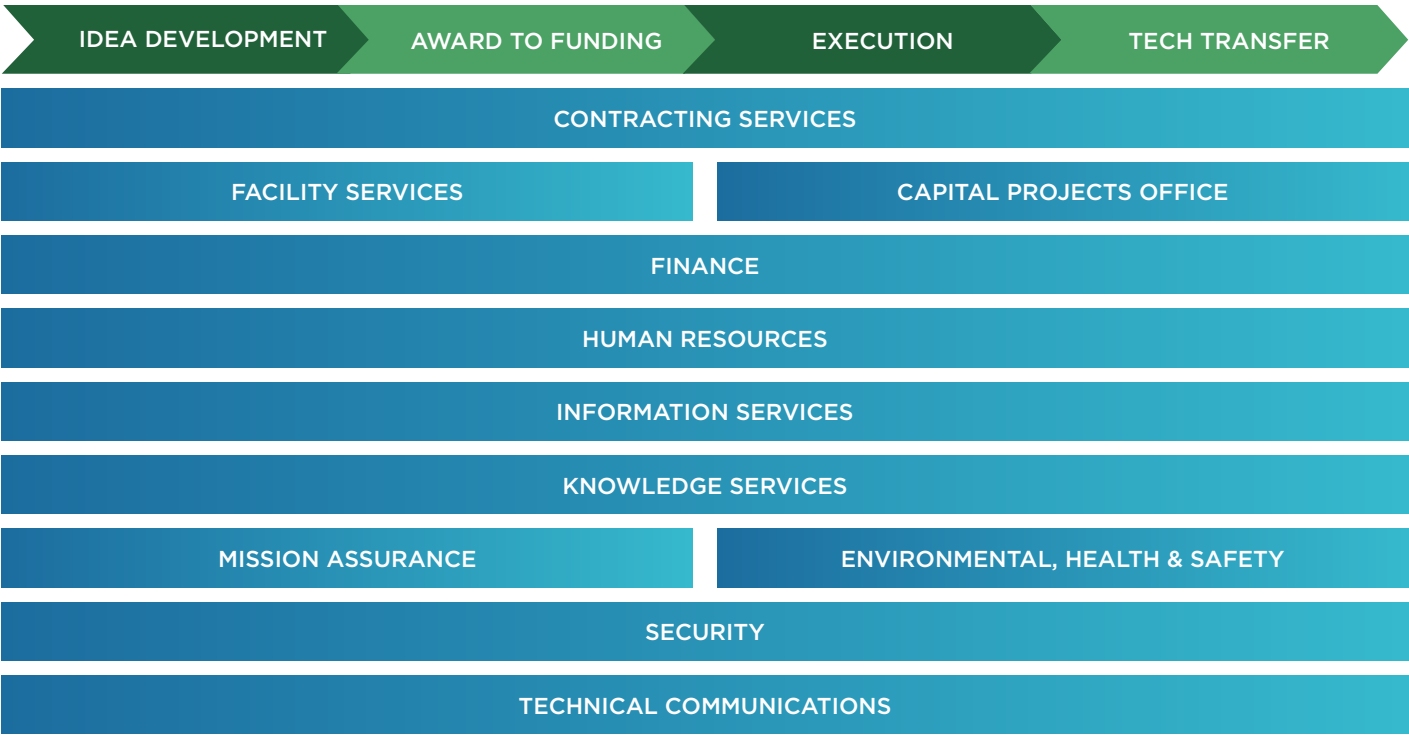
Phase 1

BusinessOptix was initially rolled out to a team of 100+ users who were focused on defining the operating model (across business areas and support functions) and capturing the top-level processes for each area. The operating model (see below) includes all processes and their associated master data; all of which will be stored in the BusinessOptix knowledge repository.

In addition to working with the BusinessOptix team, Phase 1 has been supported by:

- A communications plan designed to change the organization's mindset to standardization and process ownership
- The COO emphasizing the importance of this initiative by delivering specific goals to the BTO team and department heads (progress against targets is being reported in the organization's monthly updates)
- Sourcing and using best practice guides and training materials. In areas such as HR and IT, process definition and design support has come from organizations such as APQC (American Productivity Quality Center)
- Help and guidance for the range of users in the organization; from novice users with no process experience to more advanced users who use spreadsheets to capture processes
- A governance program that brings the whole initiative together and supports delivery of the big picture goals

Top Level Operating Model Diagram



Phase 2

After this, work will begin on detailed process definitions, transformations, delivery of new processes and reporting for the 4000 employees who will be accessing processes in BusinessOptix.

Early gains

Within the first four months of implementation, the integrated program and use of BusinessOptix was demonstrating value and accelerating development of new, more effective ways of working.

Key early outtakes include:

- Lots of organizational learning about business processes
- Process owners stepping forward, positively engaging with the initiative and instigating new, improved methods for creating, documenting and managing processes

Looking to the future

Through this initiative, ongoing training and support, and the creation of a culture of continuous process improvement, the team expects positive change and results that replace inefficiencies with better returns for the organization and its sponsors.



“When new team members joined the lab, we used to tell them it would take about five years to learn how everything worked. Early indications are that the new initiative will significantly speed up the learning curve as we develop faster ways to navigate the organization”.



About BusinessOptix

At BusinessOptix, we help organizations Control Today, Navigate Tomorrow™ to achieve the next level of customer and operational excellence. Our cloud-based Business Process Transformation suite is used by hundreds of global firms to capture and redefine business operating and process models, accelerate transformations across the enterprise, improve operational efficiencies and streamline go-to-market processes.

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