



## Case Study

# Connecting Data & Processes with Enterprise Architecture

## Background

Our customer collaborates with the financial services industry and their regulators to address root cause of failures, to contribute to financial stability and ultimately to protect customers.

## Challenge

There was no overarching direction for the management of business processes, and all of their processes and standard operating procedures (SOP) were in Microsoft Word documents.

There was also no central methodology or infrastructure for change management of processes and SOP. Instead, process or SOP changes sat within a local team or set of continuous improvement specialists. Consequently, changes were very reactionary and tactical as opposed to strategically proactive.

## Solution

The first step was to model one of their process and standard operating procedures (a 262-page Word document) into the BusinessOptix platform. They prioritized this project to test the process and result of loading the relevant SOP data to the required activity.

This was their 'proof-of-concept.' Their immediate response from employees was that the BusinessOptix process maps were much easier to use and understand making collaboration with 3rd parties much easier and more productive.

## Results

As well as ease of use, users were thrilled with the connectivity BusinessOptix provides, allowing them to collect metadata on the processes and link them into the enterprise architecture. They also found that the ability to use BusinessOptix to review their processes and SOPs and have them approved with full version control delivered governance and audit benefits. It also became a helpful training tool for new starts as it gave them the ability to see the end-to-end process on one screen, which was very helpful as a visual overview of the process.

The use of BusinessOptix quickly expanded from the initial POC group, the claims team, to the customer and employee experience teams, who began to use it to look at value chains and the customer journey modeling features. Using BusinessOptix they were able to transform their process management from reactionary to strategically proactive.

## Future

Completing the documentation of all operational processes in BusinessOptix, enables the business to move onto a program of continuous improvement, and facilitates them using the platform to collaborate with their outsourcing partners.

## Your path to success starts with a demo

Secure your personalized session now to explore how BusinessOptix can redefine what's possible for your business.

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