

## Case Study

# Transforming Customer-Facing Business Operations

## Background

A well-known financial services organization was struggling with its customer-facing work practices. The organization recognized the need to transform its ad hoc and siloed work practices into continuously improving practices. However, the organization also realized that it needed an easier way to implement these work practices as it discovered new and better ways to work.

## Challenge

To achieve its objective of transforming its customer-facing business operations, the organization created a continuous improvement team. The team's first task was to transform the claims handling process. During the early stages of the project, the team recognized that documenting the current and future states of the processes and finding a simple way to roll out these processes was crucial to the transition.

At the time, the organization was using Visio to document its processes. However, the organization soon realized that it needed a tool that would support the multiple dimensions of its work, including modeling, comparisons, version control, and more.

## Solution

The organization turned to BusinessOptix to help it create, store, and manage its processes.

The initial BusinessOptix outputs included illustrating the current and future states of the processes, creating and publishing training material, capturing process risks, enabling process sharing, reviews, and approvals, providing end-user activity reports, and creating a central process library.

## Results

As a result of using BusinessOptix, the organization has achieved several significant benefits, including:

**Cost Reduction:** BusinessOptix has enabled the organization to reduce its costs by streamlining its processes and eliminating inefficiencies. The organization is now able to identify areas for improvement and implement changes quickly and efficiently, which has resulted in significant cost savings.

**Resilience:** By using BusinessOptix, the organization has become more resilient. The organization is now better equipped to deal with changes in the business environment and adapt quickly to new challenges.

**Change Enablement:** BusinessOptix has enabled the organization to embrace change more effectively. The organization is now able to identify and implement changes more quickly, which has helped it to stay ahead of the curve and respond to changing customer needs.

## Future

The financial services organization has successfully transformed its customer-facing operations with the help of BusinessOptix. The organization is now more resilient, better equipped to continuously improve its work practices, and able to meet the evolving needs of its customers while achieving cost savings.

### About BusinessOptix

BusinessOptix is a leading business process management and transformation suite that provides total operational visibility of how business processes, people and technology interact. This allows clients to create a digital copy of their enterprise with holistic models linking strategy to key processes. Clients around the world use our process discovery, modeling and simulation tools to identify improvement opportunities and navigate change confidently. Serving a diverse customer base across sectors including finance, healthcare and manufacturing, BusinessOptix collaborates with a world-class network of technology providers, Business Process Outsourcers (BPOs) and consulting firms. This partnership approach empowers clients to become highly competitive and resilient in today's complex business landscape.

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