

Transforming Client Services in a Regulated Industry

Case Study

Financial Services Solutions Provider uses BusinessOptix to transform client services processes

With multiple applications (such as Visio, Word, PowerPoint and an EA tool) and no standards or common language for process design this financial services solutions provider was seeing significant process errors and they were wasting time recreating processes that already existed (in silos). To address these challenges, they wanted to transform the creation and management of the processes that underpin their client services, while ensuring regulatory requirements were met.

Using BusinessOptix the solutions provider leveraged its process design knowledge and capabilities to create “as-is” and compliant “to-be” processes which included:

- adding descriptions and contextual data against processes
- capturing requirements across all stakeholders
- delivering work instructions and a knowledge repository
- implementing a collaborative review and feedback process between process designers and stakeholders
- rolling 100s of new processes with embedded regulatory controls and the ability to capture evidence of their use

BusinessOptix was also used to help train the team, set standards and best practice guides, set-up a central repository, and create a direct integration into their BPM engine to deliver process automation

As a result, they have been able to eliminate errors, remove the need to recreate processes, improve their documentation, and store and share processes all while seeing team members embrace the new way of working and as a result more standardized processes, reuse, and sharing.

Going forward the team will be working on cross-functional process design, overlaying data on top of their processes to understand performance and areas for improvement, and extending their capabilities to support RPA (Robotic Process Automation).

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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