Welcome to
WfMC Global Awards for Excellence in BPM and Workflow 2014

Presented by Nathaniel Palmer, WfMC
Welcome by Layna Fischer, Future Strategies Inc

Support by
The Awards Review Panel

**Judges:**
Francesco Battista  
Paul Buhler  
Gil Laware  
Pedro Robledo  
Chuck Webster

Marco Brambilla  
Paul Harmon  
Alberto Manuel  
Cor Visser  
Justin Brunt  
Frank Kowalskowksi  
Connie Moore  
Mark von Rosing

**Lead Judges:**
Keith Swenson  
Nathaniel Palmer

**WfMC Awards Director:**
Layna Fischer, Future Strategies Inc
Recognizing Excellence!

Innovation

Impact

Implementation
Assessment Criteria

- **Innovation**
  - Innovative use of BPM technology to solve unique problems
  - Creative and successful implementation of advanced BPM concepts
  - Level of integration with other technologies and legacy systems
  - Degree of complexity in the business process and underlying IT architecture

- **Implementation**
  - Successful BPM and/or workflow implementation methodology
  - Size, scope and quality of change management process
  - Scope and scale of the implementation (e.g. size, geography, inter-company processes)

- **Impact**
  - Extent and quantifiable impact of productivity improvements
  - Significance of cost savings
  - Level of increased revenues, product enhancements, customer service or quality improvements
  - Impact of the system on competitive positioning in the marketplace
  - Proven strategic importance to the organization's mission
  - Degree to which the system enabled a culture change within the organization and methodology for achieving that change
### Situation
- Admin Re is part of the Swiss Re Group and is a specialist in the run off and administration of closed Life Business portfolios and the acquisition of Life Insurance Companies.
- Admin Re delivers in a highly compliant and regulated Insurance industry.
- An Operational Excellence Project was initiated in 2012 to improve Customer Service, enable x-site working, remove failure and reduce costs.

### Implementation & Innovation
- Delivery of a Process Management and Workflow Solution (OPUS) to support Operational and Customer Excellence.
- Next day processing supported by “Get Next” to pull next oldest piece of work that an individual is skilled to complete.
- Powerful MI suite to enable real time management of work from start to finish.
- Utilization of resources across all sites, to maximize load balancing opportunities.
- Implementation of quality controls including checklists to ensure process adherence.
- Business led (not I.T.) configuration.

### Benefits
- 15% increase in the number of transactions processed per person.
- 15% reduction in Operating costs.
- 12% reduction in telephony contact.
- 50% reduction in propensity to complain.
- 10% increase in Customer Satisfaction
- Enablement of work load balancing across all sites.
- Improved process control framework.
- New Deal secured in 2014

### Technology
- Enhanced version of the OPX Workforce Management Solution
- Skills based work routing, capacity planning, real time team allocation and real time dashboards.

---

Sponsored by:

**WfMC Awards for Excellence in BPM and Workflow**
### Situation
- Streamline and automate the complex loan approval processes to increase quality & productivity

### Implementation & Innovation
- Pilot process automation delivered quickly and rolled out to multiple locations with minimal changes

### Benefits
- Average duration of closed cases **12.5 days**, exceeding expectation of 20 days
- **100%** of information requests met on time

### Technology
- Bizagi BPMS used for complete project lifecycle: Model, Build, Run.

Part of the national **Farm Credit System**, Providing funding & financial services to **19** farmer-owned **financial cooperatives** in **15** eastern states and Puerto Rico.
Business Partners is risk finance lender to Small and Medium Enterprises. The internal team was lead by Lionel Billings assisted by Petanque and PwC Exordia

**Situation**
- Long deal approval time
- Long disbursement time
- Dissatisfied clients
- Inconsistent practice in different offices

**Implementation & Innovation**
- Mapped out as is processes
- Used Business Destination Mapping (BDM™) and VizPro® Process Mapping to refine approval and disbursement processes
- MS Dynamics to track workflow

**Benefits**
- Profitability increased by 13.5%
- Reduced processing time – average 6 to 3 months
- Satisfied customers – satisfaction survey 96.7%

**Technology**
- VizPro, MS Visio and MS Dynamics

**Business Partners** nominated by Petanque Consultancy
**Situation**
- Redundant, manual processes
- Silo’ed departments across Finance, Capital, Planning, Facilities & Operations
- Difficult to track/manage funds
- Tedious time spent with reconciling spreadsheets
- Error prone data & processes

**Implementation & Innovation**
- Business Process Re-Engineering
- Agile, Steel-Thread Methodology
- Designed for successful rollout
- Designed for Change & Scalability
- BPM/SOA principles, with mobile workforce rollout
- Effective user adoption & buy-In

**Benefits**
- Breaking down dept. silos
- Reduced overtime costs
- Accurate, real-time data
- Reduced errors & reconciliation efforts
- Improved constituent sat.
- Accountability and visibility
- Depts. “on the same page”
- Improved efficiencies
- Improved staff throughput

**Technology**
- Oracle Fusion Middleware

---

**Chicago Park District** nominated by **Sofbang**

---

Funds, Project & Work Order Management
A Complete BPM Enterprise Integrated Solution for one of the largest park districts in the nation
Delta Lloyd nominated by You-Get

<table>
<thead>
<tr>
<th>Situation</th>
<th>Implementation &amp; Innovation</th>
<th>Benefits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ultimate goal: transform Delta Lloyd into an Innovative Digital Insurance Company</td>
<td>full BPM implementation: targets achieved within &quot;Digital Insurance&quot; program</td>
<td>100% paperless</td>
</tr>
<tr>
<td></td>
<td>Efficiency and reliability of operations processes raised.</td>
<td>160,000 cases processed digitally</td>
</tr>
<tr>
<td>Technology</td>
<td></td>
<td>5% FTE reduction</td>
</tr>
<tr>
<td>IBM BPM 8.5</td>
<td></td>
<td>75% reduction of claim treatment proc.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Time- and location-independent working</td>
</tr>
</tbody>
</table>

Sponsored by:

WfMC Awards for Excellence in BPM and Workflow
<table>
<thead>
<tr>
<th>Situation</th>
<th>Implementation &amp; Innovation</th>
<th>Benefits</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Product complexity lead to difficult task management</td>
<td>• Team Leader/ Manager Exception Review Handling</td>
<td>• Real Time Transparency into the Title Process</td>
</tr>
<tr>
<td>• Title order review occurred too late in the process</td>
<td>• Documents Electronically Indexed in EDM</td>
<td>• Integration with Vendors increased speed and decreased errors</td>
</tr>
<tr>
<td>• Process reporting was not adequate</td>
<td>• Real-time Reporting and Task Assignment</td>
<td>• Title Track Team is now staffed with 52% less employees</td>
</tr>
<tr>
<td>• Fuzzy accountability</td>
<td>• Real-time inbound/outbound service integration with external enterprise system</td>
<td>• Title process improvements paved the way for platform acceptance by the business</td>
</tr>
</tbody>
</table>

**Technology**

- Savvion BPM and Sonic MQ for Service Integration and Workflow Management, Progress Control Tower for Real Time Dashboarding

**BPM Team:**
- Michael Griffis- Process Manager
- Dong Li- BPM Architect
- Michael Arroyo-Young- Delivery Manager
- Rafi Baddekonda- Senior Software Engineer
**Situation**
- Complex management flow of company procedures and standards.
- Very stratified structure of quality procedures.
- Many information exchanges and feedbacks.
- Many roles involved.

**Implementation & Innovation**
- New approach to map operational processes and manage quality-procedures.
- Unique platform to consult and manage regulations.
- Collaborative modeling and business processes optimizing (according to BPMN 2.0).

**Benefits**
- Better visibility of processes and activities.
- Time reduction.
- Easy audit and training.
- Clear definition of roles and ownership.
- Centralization of the information.
- Paper less process.
- Robust control.

**Technology:**
SIGNAVIO Process Editor SAAS

---

**Ge Avio S.r.l.** - GE Aviation business, leader in development of engine modules and components for aircraft industry. ([www.avioaero.com](http://www.avioaero.com))

**EKA S.r.l.** - spin-off of the University of Salento (Italy), center of excellence on methods and tools for PLM, BPM and DCM. ([www.eka-systems.com](http://www.eka-systems.com))
**GENERALI PPF HOLDING (GPH)** is a leading insurance group operating in Central and Eastern Europe with 2013 gross written premiums in amount of € 3.1 billion and more than 11 million clients. GPH is a member of Generali Group, one of the biggest insurance companies in the world.

### Situation
- Corporate insurance underwriting
- Multi-company
- Multi-language
- Paper based process with risk of errors

### Implementation & Innovation
- BPM application in 4 countries in 5 languages
- full value stream from sales to policy admin
- case management using BPMN

### Benefits
- 51 processes automated
- 50% reduction of cycle time
- operational risk reduction
- real time process and business reporting

### Technology
- Bizagi BPMS Enterprise .NET edition, MS SQL Server, JBoss

---

**Generali PPF Holding** nominated by **Bizagi Ltd**
The “Launch IT” initiative was conceived and driven by the InComm, Market Solutions team, as a means to deliver improved speed to market while keeping up with average annual growth rates of 60 – 70 percent.

<table>
<thead>
<tr>
<th>Situation</th>
<th>Implementation &amp; Innovation</th>
<th>Benefits</th>
</tr>
</thead>
</table>
| • Launch of new prepaid products into retail partner stores & POS systems requires collaboration and approvals across many teams  
• Consistent annual growth rates in conjunction with the knowledge level required to execute various steps in the process made hiring additional staff plus minor tweaks to existing processes an ineffective, costly approach | • Solution layered process and case management capabilities, moving from a straight through process to a ‘signal driven’ structure  
• Moved from reviewing every item to only touching items requiring action  
• Allows parallel work by process participants | • Elimination of spreadsheets and emails  
• Increased quality  
• Enabled scalability |

**Technology**

- Whitestein’s Living Systems Process Suite
The AtosBPM is a tool of Lecom for automation and productivity processes with BPM, Electronic Content Management (ECM) and Management of Productivity Indicators (KPI) features. It enables the monitoring of all stages of the process, detects unproductive tasks and identifies trouble spots (so-called “bottlenecks”), resulting in much faster outlets and rational decision.

**Situation**

- Strong level of growth, but without regularity
- Frequent payment of penalties for failure to pay suppliers on time
- Costs with high number of ERP (approvers) users
- Necessity of geographic independence: viability of approving steps outdoors; solution in web platform; reduce the use of paper.

**Implementation & Innovation**

- Emancipation in using the tool: vendor independence; transfer of know-how to design new flow models
- Integrating IT tools: allow information involve transit between different systems (Oracle and SQL), with access to databases and attaching files

**Benefits**

- Reduction in delays of payments:  
  2003: 6.87%  
  2011: 0.55%
- Fall in annual interest expense and penalties in the R$ 65K+  
- Reduction of Events / costs:  
  2010: 1250 hits/month - R$ 82K/month  
  2011: 700 hits/month - R$ 61K/month  
  2012: 280 hits/month - R$ 6K/month
- Better Control of documents / payments
- Print the legality Approvals: Approvals of flows should have legal value
- Anticipation of problems

**Technology**

Application developed in Java using the API’s:

- Hibernate to connect to the database
- jQuery to build dynamic layouts
- FusionCharts to generate charts

www.melitta.com  
www.atosbpm.com.br  |  www.lecom.com.br
**Punch Taverns** nominated by **Appian**

Punch Taverns is one of the UK’s largest leased pub companies with a portfolio of around 4,500 pubs nationwide.

### Situation
- Punch Taverns’ vision is to be the highest quality, most trusted and best value pub partner in the UK.
- Punch Taverns’ looked to modernize systems running its core business to accelerate operations, increase lease Partner engagement, and optimize business performance.

### Implementation & Innovation
- Deployed Cloud solution to accelerate pub investment and management.
- Enabled Records as a CRM solution to centralize pub data, allowing critical data to be made available for workers at headquarters or in field (mobile).
- Intuitive social interface creates rapid awareness, knowledge and action of critical processes and decision making.

### Benefits
- Punch Taverns has drastically increased capability to deliver investment within it’s pub estate.
- In 2011-2012 (prior to platform implementation) Punch Taverns was able to support £38M in investment across 400 pubs. Punch Taverns has increased business metabolism significantly, allowing Punch to invest £48.5m in 476 pubs in 2012-2013.
- Pub management processes have been streamlined such that documents can be developed, signed and completed within 10 minutes in several cases.

### Technology
- Appian delivers an enterprise application platform that unites users with all their data, processes, and collaborations – in one environment, on any mobile device, through a simple social interface.

---

Sponsored by:

**WfMC Awards for Excellence in BPM and Workflow**
Richmond Fellowship Tasmania is independent non-for-profit Mental Health Service Provider in Tasmania

<table>
<thead>
<tr>
<th>Situation</th>
<th>Implementation &amp; Innovation</th>
<th>Benefits</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Regulatory Compliance (NDIS)</td>
<td>• Consumer centered model</td>
<td>• Track outcomes for each consumer</td>
</tr>
<tr>
<td>• Funding changes</td>
<td>• Outcomes measurement</td>
<td>• Change Management increasing service</td>
</tr>
<tr>
<td>• Inadequate IT systems</td>
<td>• Redesigned BP &amp; implemented Case</td>
<td>• Reduction of unit cost</td>
</tr>
</tbody>
</table>

Benefits

- Track outcomes for each consumer
- Change Management increasing service
- Reduction of unit cost

Technology

- VisiCase (Case Management Software) from FlowConnect

Sponsored by:

- Richmond Fellowship Tasmania
- FlowConnect
- WfMC Awards for Excellence in BPM and Workflow
RSA Chile’s **very complex** project has been carried out entirely **without having to write a single line of programming code.**

### Situation
- Slow & erroneous management due to manual processes.
- Poor organization of paper documentation.
- Lack of analytical capability.

### Implementation & Innovation
- Workflows
- Automatic Documents & Document Management
- Case Management
- BAM, BI, KPIs, etc.

### Benefits
**Reductions in:**
- Time = 74%
- Costs = 47%
- Errors = 88%

**Increases in:**
- Efficiency = 60%
- Analytical Capability = 83%

### Technology
DAD (Dynamically Activated Divisions), Distributed Treatments, Integrated Tasks

---

**Sponsored by:**
- **WfMC Awards for Excellence in BPM and Workflow**
- **RSA Chile** nominated by **AuraPortal**
Seattle City Light is the 10th largest public electric utility in the United States. The business area staff, IT staff and 3Di worked well together to come up with an innovative solution that has set the stage for future improvements.

**Situation**
- Complex manual processes (search, filing, managing tasks)
- Limited monitoring, reporting, performance measurement
- No common process for managing work
- No common automation platform

**Implementation & Innovation**
- Scalable platform for process automation
- User experience driven implementation
- Incremental implementation approach
- Establish continuous improvement

**Benefits**
- ROI of $1.8 M
- Efficiencies from staff having an integrated work area
- Retention of organization knowledge
- Improved reporting and future integration with other supporting workflows
- Common automation platform

**Technology**
- Oracle BPM, Oracle WebCenter Content & Portal, Oracle IDM, Oracle Database, SOA

Sponsored by:

WfMC Awards for Excellence in BPM and Workflow
Sempra Energy, based in San Diego, is a Fortune 500 energy services holding company that develops energy infrastructure, operates utilities and provides related products and services to more than 31 million consumers worldwide.

<table>
<thead>
<tr>
<th>Situation</th>
<th>Implementation &amp; Innovation</th>
<th>Benefits</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Continually track critical pipeline health</td>
<td>• Custom tracking platform &amp; four workflow processes</td>
<td>• Better collaboration &amp; seamless integration with current systems</td>
</tr>
<tr>
<td>• Document management for multiple users &amp; locations</td>
<td>• Pipeline Document Management System</td>
<td>• Reduced risk due to incomplete or missed information; check in, check out functionality</td>
</tr>
<tr>
<td>• Offline access for field workers</td>
<td>• Field Inspections &amp; Field Inbox</td>
<td>• Access to data without Internet access; automatic sync upon return to network</td>
</tr>
</tbody>
</table>

**Technology**

• Eccentex AppBase

**Sponsored by:**

Sempra nominated by Eccentex

**WfMC Awards for Excellence in BPM and Workflow**
### Situation
- Increasing costs
- Increasing complaints
- Inconsistent application of policy

### Implementation & Innovation
- Scripts and Best Practice Procedures
- Change Management
- Centralised cases management

### Benefits
- Net additional revenue of $1.1m
- Increased quality
- Reduced processing time
- Improved customer experience

### Technology
- Salesforce/Enterprise Process Centre/Mini Tab
### Situation
- Costly and time demanding, paper-based process, to permit each government entity to communicate and notify citizens.

### Implementation & Innovation
- One Single BPM solution to electronically notify every citizen, public entity and private company in the country.
- Adapting the process to each notifier entity’s needs.

### Benefits
- Unify recipient’s electronic address to receive from any government entity.
- Security (not losing papers, improved confidentiality).
- Reducing paper-related costs (sheets, printers...).
- Reducing environmental footprint (electricity, CO2 to move papers and people).

### Technology
- INTEGRADOC, a proven document-centric BPMS, specialized in eGovernment and medium-big private companies in Latin America.

---

**Sponsored by:**

**Uruguayan Agency for eGovernment (AGESIC)** nominated by **INTEGRADOC**

**e-notificaciones**

Sistema de Notificaciones y Comunicaciones Electrónicas

**AGESIC**

Sistemas de Gobierno Electrónico y Sociedad de la Información

INTEGRADOCS

**INTEGRADOC** is the leading document-centric BPM Suite in Latam.
2014 Winners Recap

- Admin Re nominated by Corporate Modelling Services Limited
- AgFirst Farm Credit Bank nominated by Bizagi Ltd
- BusinessPartners nominated by Petanque Consultancy
- Chicago Park District nominated by Sofbang
- Delta Lloyd nominated by You-Get
- Freedom Mortgage Corporation nominated by Freedom Mortgage Corporation
- GE Avio S.r.l nominated by EKA S.r.l.
- Generali PFF Holding nominated by Bizagi Ltd
- InComm nominated by Living Systems Technologies
- Melitta of Brazil nominated by Lecom S/A
- Punch Taverns nominated by Appian
- Richmond Fellowship Tasmania nominated by FlowConnect
- RSA Chile nominated by AuraPortal
- Seattle City Light nominated by 3DI
- Sempra nominated by Eccentex
- South East Water nominated by South East Water
- Uruguayan Agency for eGovernment (AGESIC) nominated by INTEGRADOC

Congratulations!
2014 Winners will be published in the next edition on the Excellence in Practice series. Previous winners received additional recognition through publication in these books.

All books are available on Amazon.com in Print Format.

Digital Editions can be downloaded from www.FutStrat.com

Sponsored by: WfMC Awards for Excellence in BPM and Workflow
Our congratulations again to the Winners!

Keith Swenson, WfMC Chair
Nathaniel Palmer, Executive Director, WfMC
Layna Fischer, Awards Director and Publisher, Future Strategies Inc.

The slides will be posted to http://bpmf.org/.