Intelligent Business Process Management through LowCode

Transform and digitalize operations through iBPM and LowCode
We welcome you to our Grab’n Go session

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Agenda

1 Introduction
   What is iBPM and LowCode

2 Appian Demo
   Use Case to request bank loans in times of COVID19

3 Deloitte’s SmartOps Platform
   Customizable Appian Platform

4 Key takeaways

5 Q&A
Organizations across the globe have been transforming their business through digitization, and it continues being a priority.

**Business Executive’s expectations**

71% consider digital transformation very important, however only 26% feel capable or highly capable to execute.

35% are implementing automation (RPA, Artificial Intelligence, Business Intelligence) however 66% consider process fragmentation a key barrier.

Executives estimate that intelligent automation will provide their organizations an average cost reduction of 22% over the next 3 years.

Unlocking the full potential of Digital Transformation requires a complete reengineering of front and back office processes by leveraging intelligent automation & digital.

Nevertheless, organizations are struggling to implement comprehensive automation strategies.
Through iBPM and LowCode organization can transform their operations with ease and speed

**iBPM to transform**

- Orchestrated and automate as the top layer above people and applications
- Deliver a single view with all relevant case information
- Run intelligent processes with real time analytics and continuous improvement

**LowCode for speed**

- [Build process apps and user interfaces at rapid speed](#) per mouse click with an ever-growing toolbox of drag-and-drop elements
- User interfaces run on any device, including mobile devices using native OS features
- Maintain and change with ease without being slowed down by technology
iBPM breaks down organizational barriers and silos allowing companies to become more flexible and adoptive to change.
Case 1: A Tier 1 European Bank uses iBPM (Appian) platform to supplement RPA and deliver in record time

**The challenge**

- An outdated BPM platform, which was not capable of meeting the time to market of new commercial campaigns
- The use RPA was very fragmented and focused on the bank's Back-office,
- A new iBPM tool was needed to orchestrate cross business area processes including the robots capable to execute

**The outcome**

- An iBPM development platform for processes in minimum time, with all the common components necessary for integration with the different systems of the bank
- I.e. enabling implementation of a Risk Process in **3 weeks**, being the first Spanish bank to grant COVID-19 ICO loans
Case 2: Process Transformation in Insurance using Appian

The project:

- **Motor Claims Management**: Redesign and automation of process from front-end to back-end to external vendors
- **Claim Inspections**: Empowerment of the claim inspectors with mobile devices
- **Policy Renewals**: Digitalized all commercial and policy manager activities for renewal proposal

The outcome:

- **30%** Average decrease on the claim process duration
- **25%** Average decrease on time for renewal process
- Reduction of human errors
- Higher customer satisfaction
Appian can either be your ‘one-stop shop’ for intelligent automation or orchestrate and integrate across the entire ecosystem.
Appian Demo
Presenting Deloitte platform that accelerates smart operations adoption

Appian based platform
The solution can oversight operations, promote transparency, increase efficiency and mitigate risk, orchestrating multiple automation capabilities to lower run costs and maximize value.

Benefits

- **Maintain control**
- **Increase efficiency**
- **Reduce costs**
- **Mitigate risk**
- **Promote transparency**
DELOITTE’S SMARTOPS PLATFORM

My Work Center

Key Features:
- Consolidated case view
- Task status on team level
- Smart task assignment
- Effectiveness ranking (gamification concept)
- User-to-user messaging
Case Management Framework features – Case Search

Key Features:
- Query open and closed cases
- Unified view for all cases delivering rapidly relevant information about case progress and status
- Step/Task history for each case and list of participants
- Quick access to case documents

**DELOITTE'S SMARTOPS PLATFORM**

**Case: adding cards to your bank - Andrew Coast**

**Context**

**Andrew Coast**

**Customer Summary**

Open Cases: 10
Acquired Products: 0

**Contact Information**

Tel: 2079469337
Email: andre162.costa@gmail.com

**Description**

Hi, May I kindly suggest to add contactless to your cards? All other banks have it, so it will be a great plus to have it here. Kind regards, Andrew

**Tasks**

- Analyse new complaint
  - Status: Completed by André Costa on May 21, 2020 03:46
  - Created on May 20, 2020 10:23 to CMA Complaint Manager group

- Analyse complaint and provide advice
  - Status: Assigned to CMA Cards
  - Created on May 21, 2020 08:46 to CMA Cards group
Case Management Framework features – Operational Cockpit

**Key Features**

- Real-time view on operational KPIs
- Filter information by period, case type and step
- Backlog information and status against predefined SLAs
- Tracking of operational KPIs related with tasks duration, effectiveness, rework and capacity against previous period
Case Management Framework features – Operational Performance

**DELLOITTE’S SMARTOPS PLATFORM**

**Key Features**
- Trend analysis on operational KPIs, per case type
- Real-time monitoring base on process metrics
- Focus on Customer SLA metrics

**KPIs definition**
- Global SLA Accomplishment – Time spent to complete tasks against predefined SLAs
- % of Operations within SLA – Tasks completed within the SLA divided by the total number of tasks
Case Management Framework features – Operational Performance

**Key Features**
- Trend analysis on operational KPIs, per case type
- Real-time monitoring base on process metrics
- Focus on Efficiency

**KPIs definition**
- Total Time of Execution – Time spent completing human tasks
- RPA Execution – Time spent completing automated tasks (executed by a bot)
- Case Average Cost – Average time spent executing a case multiplied by hourly rate
- Ratio of Reworked Cases – Tasks that needed rework divided by the total number of tasks
Case Management Framework features – Operational Performance

Key Features

- Trend analysis on operational KPIs, per case type
- Real-time monitoring base on process metrics
- Focus on **Effectiveness**

**KPIs definition**

- **Cases Completed** – Number of cases completed on the defined timeline
- **Outstanding Cases** – Number of cases open on the defined timeline
- **Effectiveness Evolution** – Evolution of ins and outs in the team backlog
- **Daily completion and opening rates**
Case Management Framework features – Operational Performance

**Key Features**

- Trend analysis on operational KPIs, per case type
- Real-time monitoring base on process metrics
- Focus on Team Allocation Efficiency

**KPIs definition**

- Planned Capacity – # of planned FTEs
- My Team Resources – effective capacity
- Effective Allocation – # of FTEs allocated to case activities
- Resource Allocation – Effective allocation divided by my team resources
Through iBPM and LowCode your organization can achieve the following benefits

**KEY TAKEAWAYS**

- Process Excellence through continuous improvement
- End-to-end Automation
- Orchestration across People & Technology

An E2E Ops transformation will foster efficiency, delivering the right tools for the Organization to improve customer satisfaction and enable smarter operations.
Q&A | Please do not hesitate to reach out to us directly if you have further questions

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