



MARCH 2021

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



Orchestrate 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



Build process apps and user interfaces at rapid speed per mouse click with an ever-growing toolbox of drag-and-drop elements



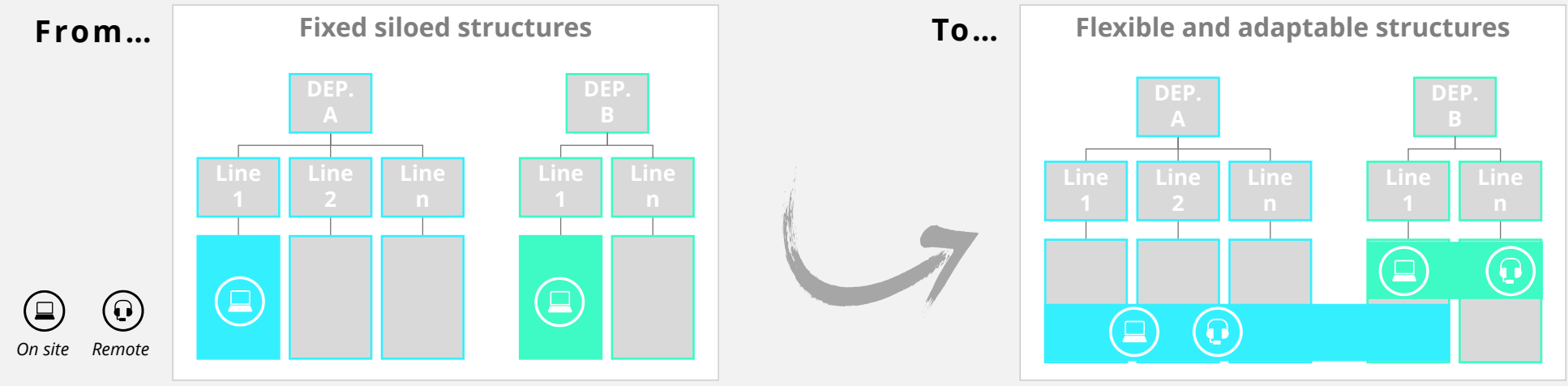
User interfaces run on any device, including mobile devices using native OS features



Maintain and change with ease without being slowed down by technology

LowCode for speed

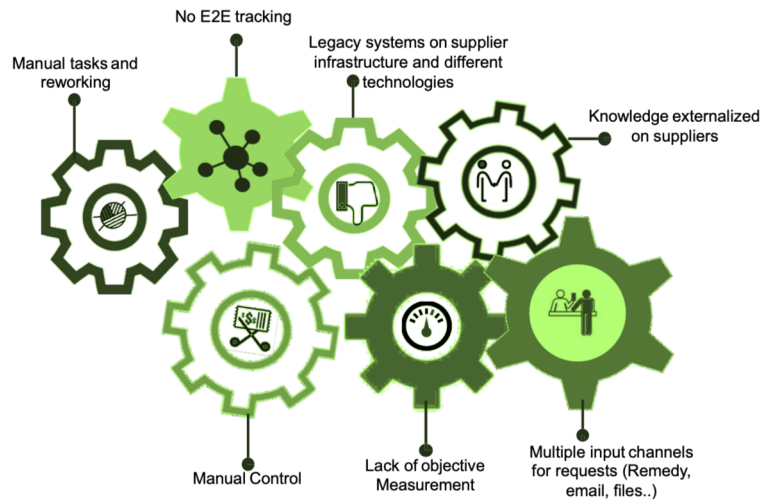
iBPM breaks down organizational barriers and silos allowing companies to become more flexible and adoptive to change



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



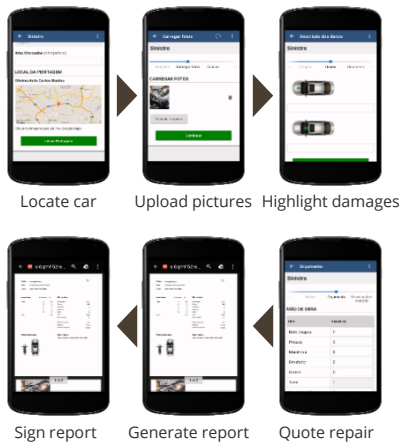
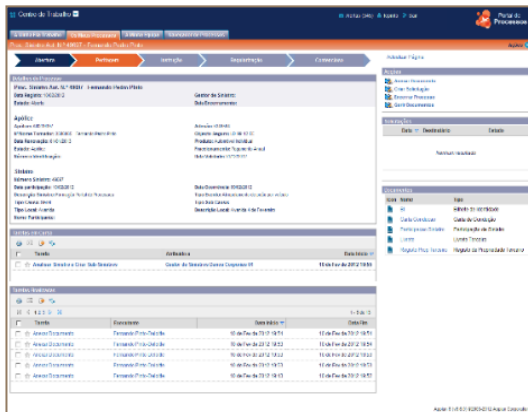
The outcome

- 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:

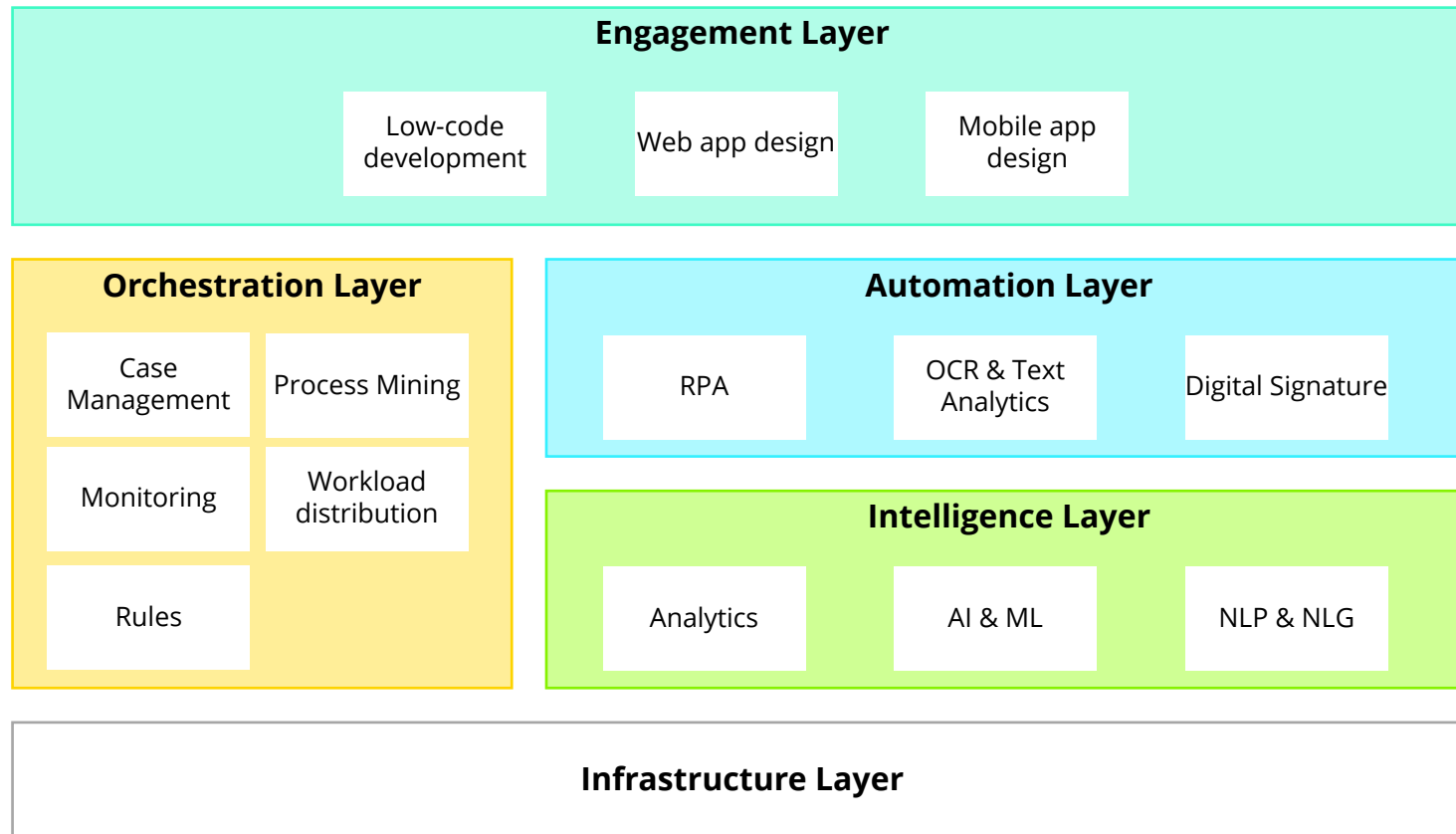
- **Motor Claims Management:** Redesign and automation of process from front-end to back-end to external vendors
- **Claim Inspections:** Empowerment of the claim inspectors with mobile devices
- **Policy Renewals:** digitalized all commercial and policy manager activities for renewal proposal



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



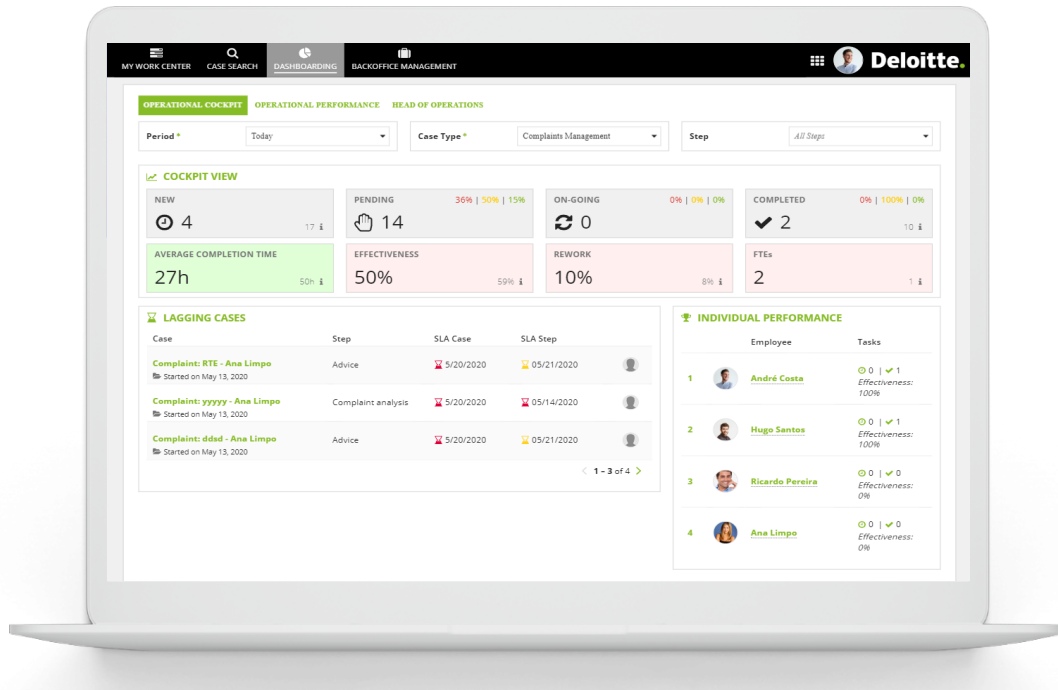
Appian Demo

Presenting Deloitte platform that accelerates smart operations adoption

1

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

My Work Center

MY WORK CENTER CASE SEARCH DASHBOARDING BACKOFFICE MANAGEMENT

Welcome, André Costa.

PAST DUE 59% | 41%

12

ACTIVE

14

ON-HOLD

0

COMPLETED TODAY

0

MY CASES | PAST CASES | FOLLOWED CASES

--- Select a Case Type --- SEARCH CLEAR

<input type="checkbox"/>	Step/Task	Case Type	Case Name	Status	
<input type="checkbox"/>	Analyse complaint and provide advice <small>Stage: Advice Due Date: May 22, 2020 03:37</small>	Complaints Management	Complaint: Transfer not working for three days - Andrew Coast <small>Due Date: May 27, 2020</small>	Assigned	☆
<input type="checkbox"/>	Analyse complaint and provide advice <small>Stage: Advice Due Date: May 21, 2020 03:56</small>	Complaints Management	Complaint: adding cards to your bank - Andrew Coast <small>Due Date: May 27, 2020</small>	Assigned	☆
<input type="checkbox"/>	Analyse complaint and provide advice <small>Stage: Advice Due Date: May 21, 2020 03:32</small>	Complaints Management	Complaint: ddsd - Ana Limpo <small>Due Date: May 20, 2020</small>	Assigned	☆
<input type="checkbox"/>	Analyse new complaint <small>Stage: Complaint analysis Due Date: May 21, 2020 11:18</small>	Complaints Management	Complaint: Problem with Transfer - Andrew Coast <small>Due Date: May 27, 2020</small>	Assigned	☆
<input type="checkbox"/>	Analyse new complaint <small>Stage: Complaint analysis Due Date: May 21, 2020 11:18</small>	Complaints Management	Complaint: Broken Card - Chelsea Edwards <small>Due Date: May 27, 2020</small>	Assigned	☆

Refresh

All Tasks - Top 3 ranking

Hugo Santos 0 | 1

Effectiveness: 100%

André Costa 0 | 20

Effectiveness: 100%

Ricardo Pereira 1 | 25

Effectiveness: 96%

Notification Panel

Direct message with Low priority x

André Costa

May 21, 2020 03:36

Subject: Complete task for presentation

Can you please complete task 5 for the presentation next week?

Send a Notification

My Notes

Review presentation for wednesday x

Add New Notes

Key Features

- Consolidated case view
- Task status on team level
- Smart task assignment
- Effectiveness ranking (gamification concept)
- User-to-user messaging

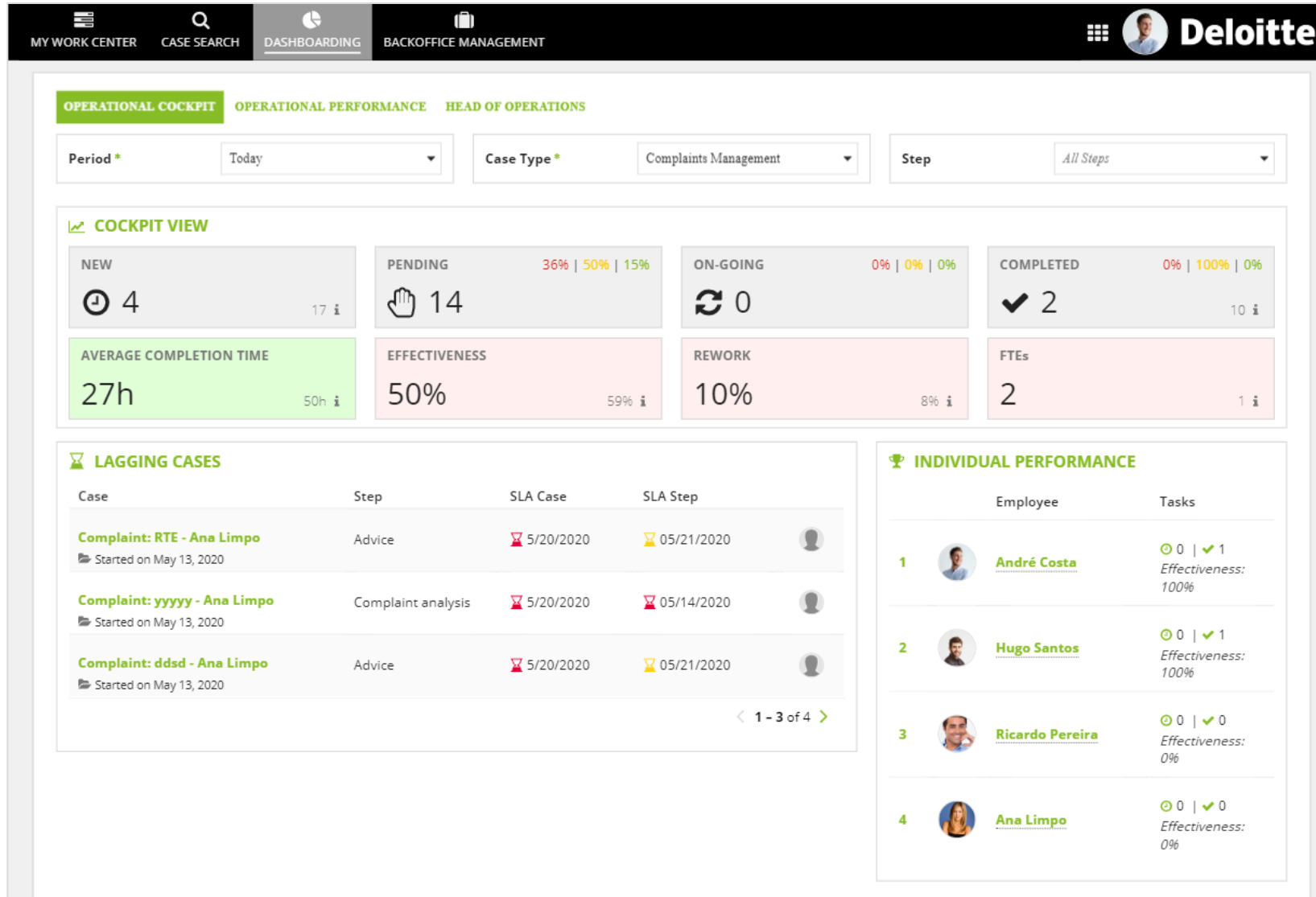
Case Management Framework features – Case Search

The screenshot displays the Deloitte Case Management Framework interface. At the top, there is a navigation bar with options: MY WORK CENTER, CASE SEARCH (selected), DASHBOARDING, and BACKOFFICE MANAGEMENT. The Deloitte logo is in the top right corner. The main content area shows a case titled 'Complaint: adding cards to your bank - Andrew Coast'. Below the title are tabs for Summary (selected), News, and Related Actions. On the left, there is a 'CASE STAGE' sidebar with a progress indicator showing stages: Open, Complaint analysis, Advice (current), Decision/Response, and Closed. Below this is the 'CASE PARTICIPANTS' section, showing André Costa as a Complaints Manager. The main case details include a 'CONTEXT' section with a customer profile for Andrew Coast, including his contact information and a summary of his cases. Below this is the complaint title and a table with columns for Registration Date, Type, Area of Expertise, and Sentiment Analysis. A description of the complaint is provided. At the bottom, there is a 'TASKS' section with a dropdown for 'Task Status' (set to 'All') and a list of tasks with their respective statuses and completion details.

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

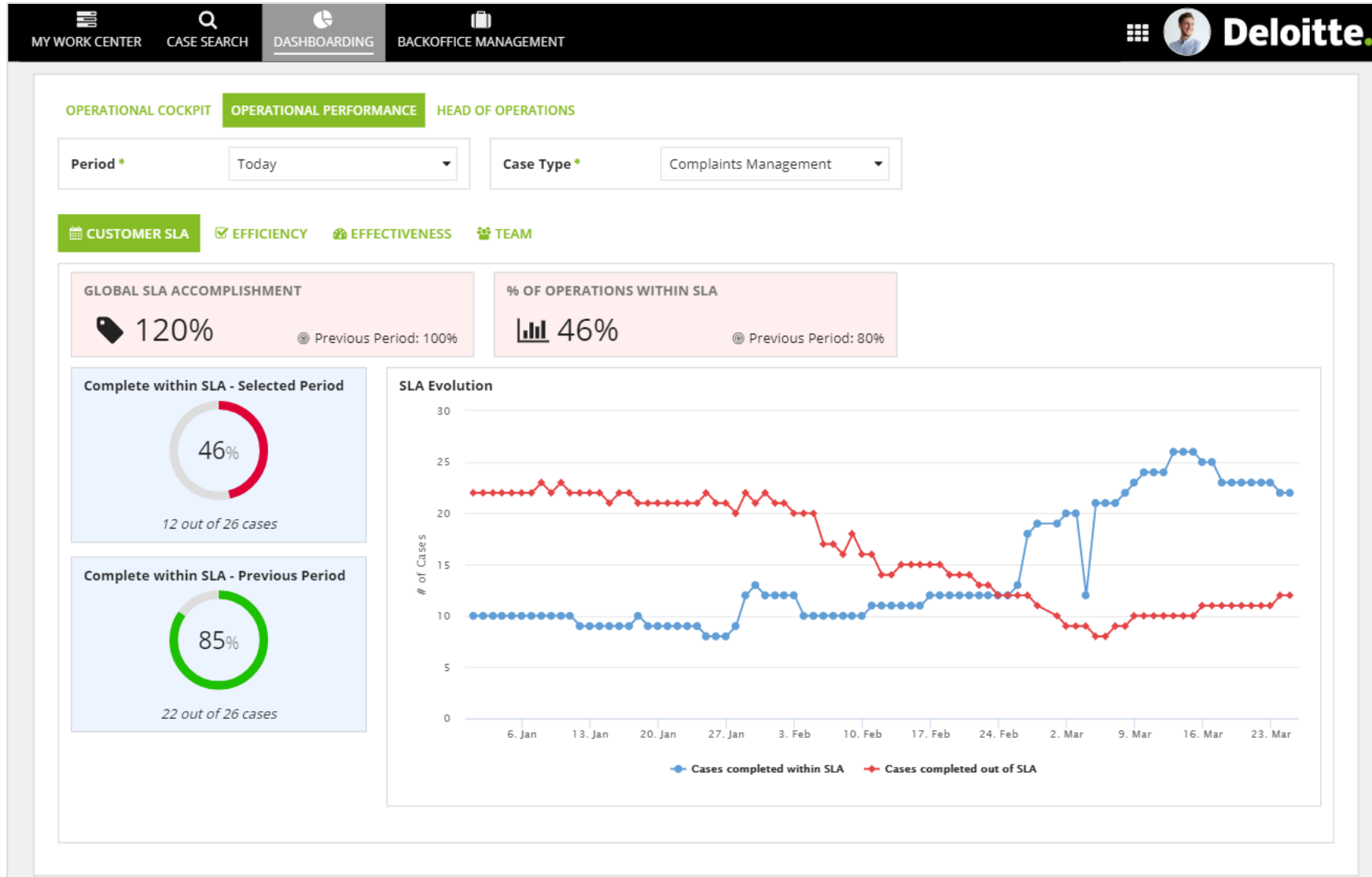
Case Management Framework features – Operational Cockpit



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



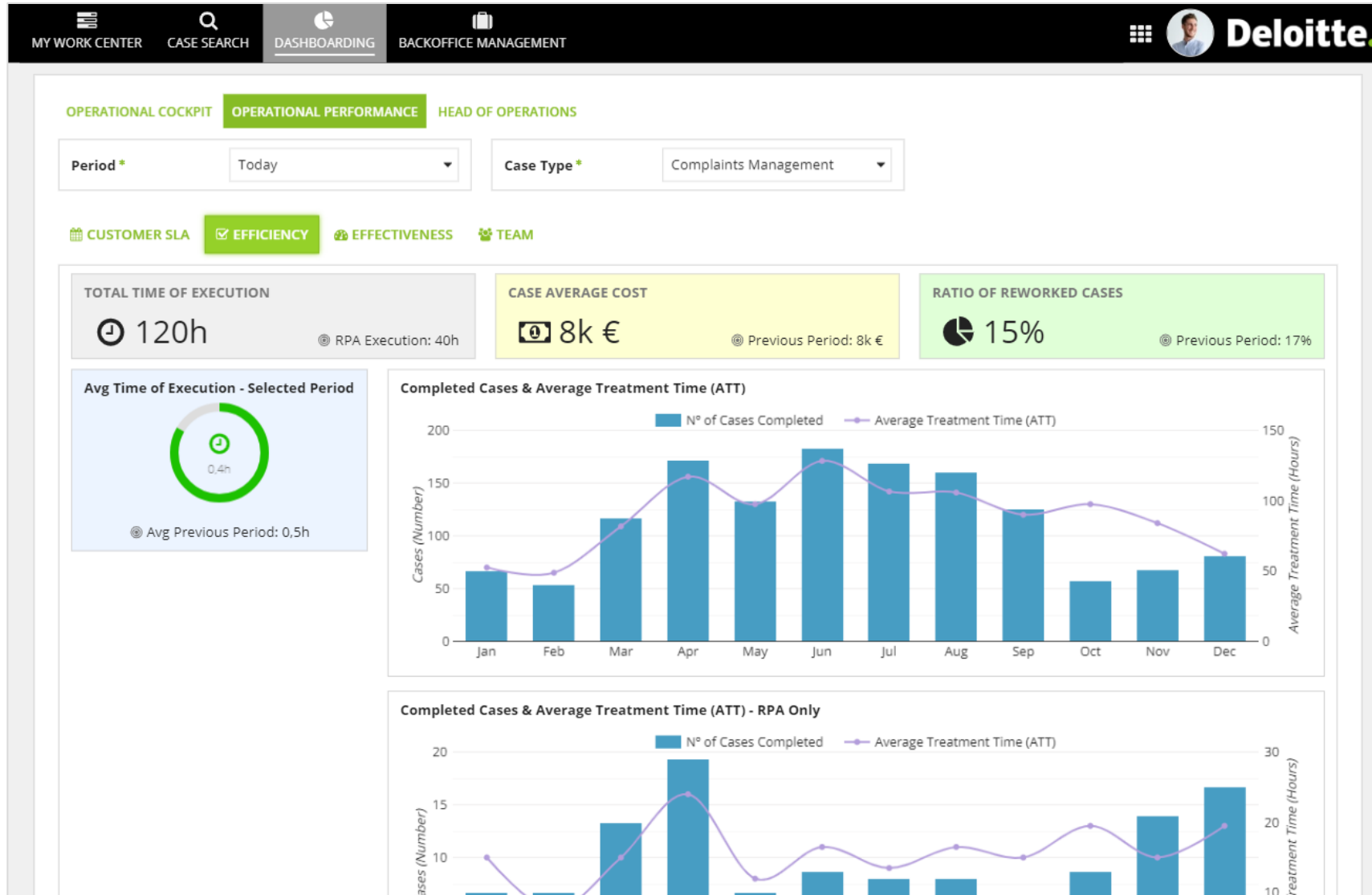
Key Features

- 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



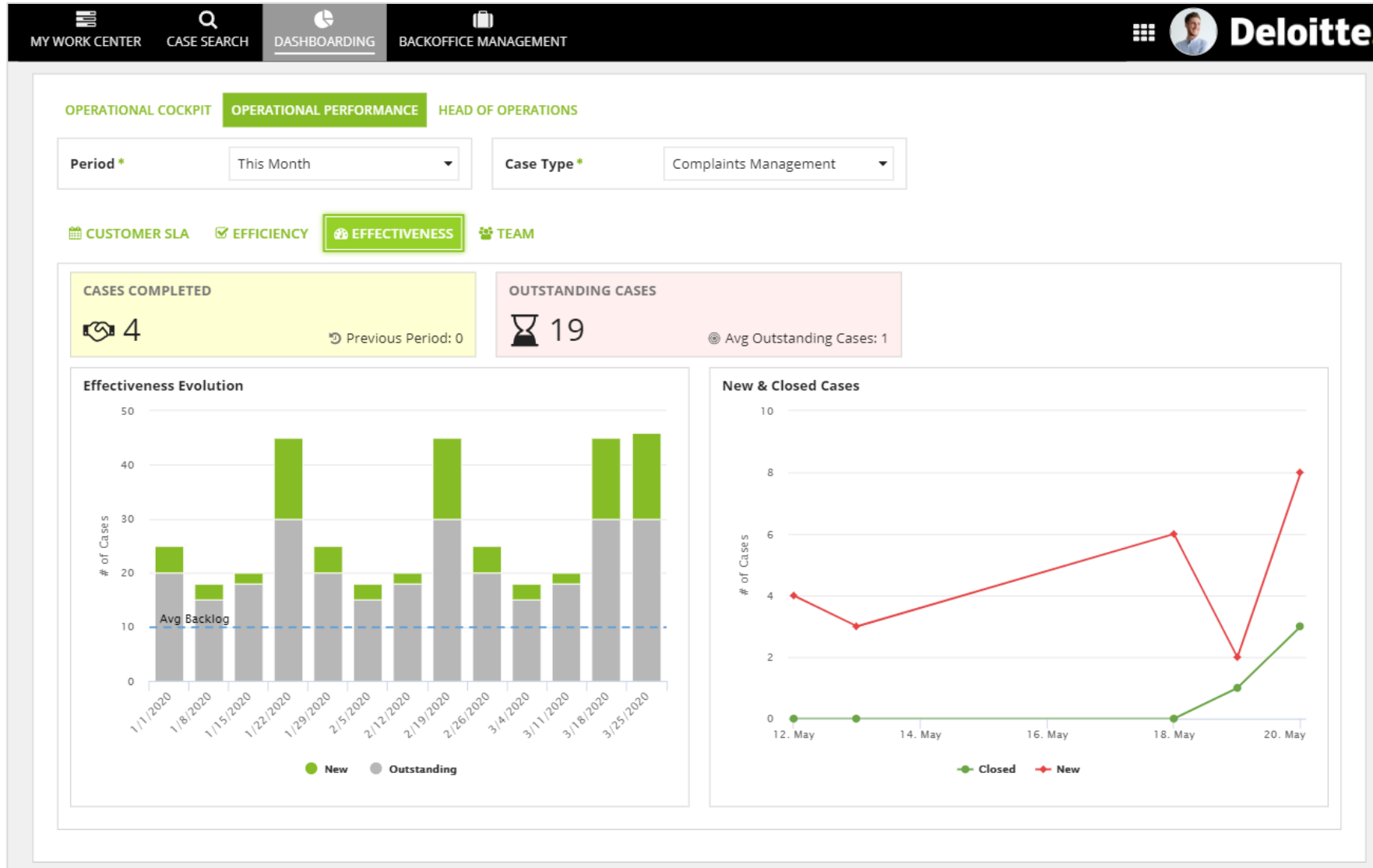
Key Features

- 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



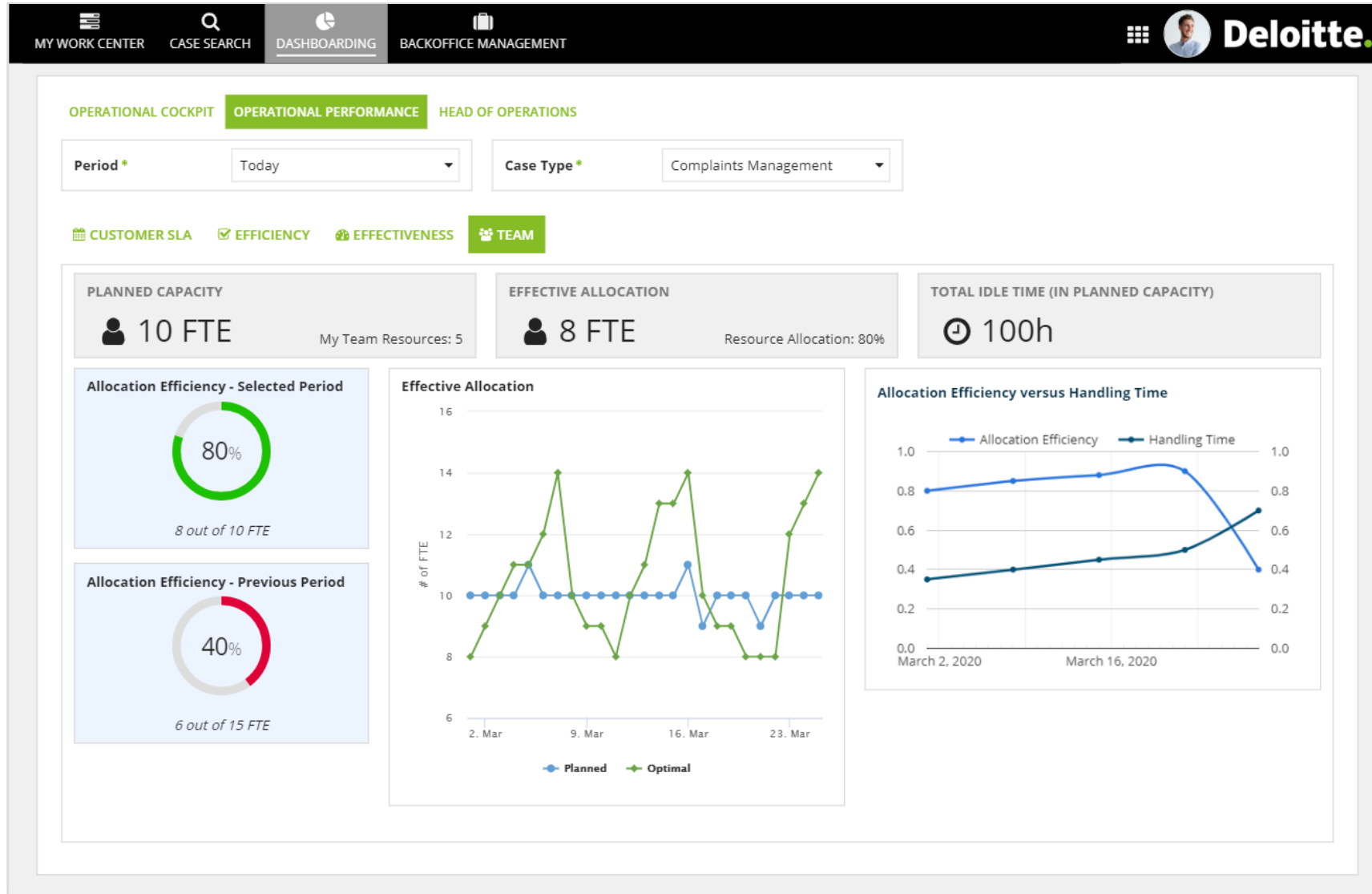
Key Features

- 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



Orchestration
across People &
Technology



End-to-end
Automation



Process Excellence
through continuous
improvement

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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