Skan AI

The PROCESS INTELLIGENCE Playbook

Your guide to achieving operational excellence and business transformation in the age of AI

TABLE OF CONTENTS

1. Process Intelligence 3

Unlock the Value of Your Operations Black Box 5

The 360⁰ Angles of Your End-to-End Processes 6

2. Why You Need Process Intelligence 7

Process Intelligence vs. Conventional Process Discovery Methods 8

Four Shortcomings of Manual Process Discovery Methods 9

See How Other Process Discovery Methods Compare to Process Intelligence 10

Process Intelligence at a Glance: How Does it Compare to Process Mining and Task Mining? 12

3. The Impact of Generative AI on Process Intelligence 13

Speak the Language of Your Business 14

4. Four Benefits of Process Intelligence that Reach Across Your Organization 15

1. Get More Out of Automation 16

2. Support the Continuous Journey to Operational Excellence 18

3. Exceed Quality and Compliance Adherence 19

4. Boost Your Organization's Future of Work Readiness 22

5. Your Process Intelligence Starter Kit 25

Implementation Timeline: What to Expect in Each Phase 26

How to Demonstrate PI's Business Value 27

How to Pick Your First Use Case 28

How to Avoid the 5 Common Implementation Pitfalls 29

How to Vet Process Intelligence Platforms 31

See How Process Intelligence Can Give You a Sweeping End-to-End View of Your Processes 35

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Process Intelligence



You're on a road trip with a printed map as your guide. Every unexpected roadblock throws you off course, with no warning signs or alternate routes in sight. Many of today's organizations are eager to implement fast-moving technologies, but like using a traditional map, they're relying on outdated methods of process discovery and understanding.

Now picture the same journey, but this time with an app guiding you in real time. The map springs alive, pointing out obstacles in the road, warning of inclement weather,and automatically rerouting you around traffic jams. This is how companies using **Process Intelligence** are navigating their operations and driving towards true operational excellence.

You can't improve your business operations unless you understand your business operations.

Process Intelligence evolves conventionally available strategies you're currently using. New technologies introduce more automated and scalable methods for analyzing processes. Combined with recent developments in artificial intelligence, you can now unlock data-driven approaches to understanding process details in ways not previously possible.

AI-powered **Process Intelligence** is a game-changer for enterprises focused on implementing data-driven decision making. With it, you can establish metrics-based goals and identify transformation opportunities in four key areas:

01 Automation

02 Operational Excellence

03 Quality & Compliance

04 Future of Work Readiness

Only Process Intelligence provides frictionless observation at scale across all enterprise processes, so companies can go from insights to action quickly, easily, and securely.

Benefits of Process Intelligence:



360° Process Visualization:

Transform the way you manage operations with unparalleled depth, continuously, at scale.



AI-Powered, Real-Time Insights:

Always-on analytics and predictive intelligence that redefine decision-making.



Speed to Value:

It's zero-integration design avoids time-consuming and costly data engineering and preparation, ensuring rapid implementation and scalability.



Privacy-First:

Non-intrusive, aggregate data approach with transparency and privacy-first architecture.

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Unlock the Value of Your Operations Black Box

According to McKinsey, most organizations only analyze a fraction of the data generated by connected devices due to limitations in legacy technology.[1]

Most enterprises are using technology to capture structured data, like transaction and master data, as it moves through their organization.

But most legacy process discovery platforms fall short when it comes to understanding the importance of unstructured data. When 80–90% of your data is unstructured, organizations can't afford to lean on a platform that doesn't specialize in analyzing it.[2]



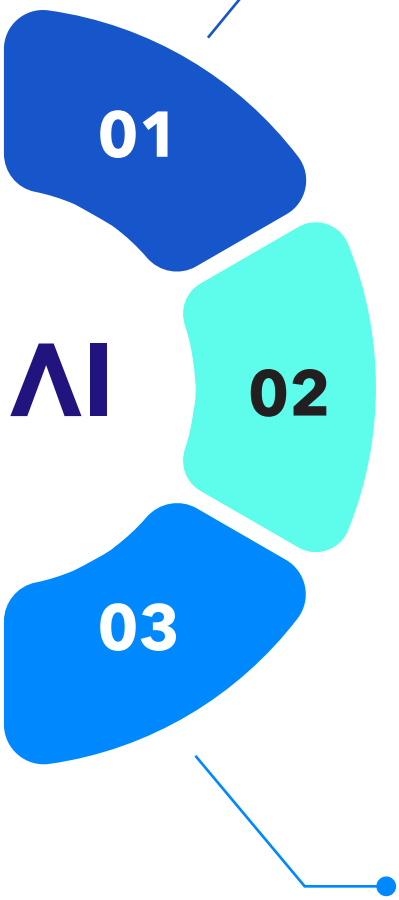
Having the ability to capture unstructured data that is generated across human-system interactions is the key to gaining end-to-end operational intelligence.

Process Intelligence captures all data, structured and unstructured, and uses AI to interpret it through a data-science lens.

Using these new insights, business leaders are able to gain actionable intelligence at scale. This reliable, single source of truth that Process Intelligence provides is critical to better business outcomes, especially in this era of business transformation.

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The 360⁰ Angles of Your End-to-End Processes



Structured Processes

- Transactional
- System-centric and data-heavy
- Repeatable and unvaried
- Definitive formats, predictable outcomes
- **Examples:** Transactions, AP/AR finance, payroll, invoicing, supply chain management

Semi-Structured Processes

- Human-system interactions
- Fusion of knowledge-driven and systems-centric work
- **Examples:** Enrollment & underwriting, loan origination, claims management, customer onboarding, policy administration

Unstructured Processes

- Highly varied
- Unpredictable outcomes
- Heavily knowledge-driven
- **Examples:** Customer support, appeals & grievances, research & analysis, document summary, credentialing

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Why You Need Process Intelligence

70% of digital transformations fail because transformation efforts are not backed by facts.

PROCESS INTELLIGENCE: A better way to beat the odds.

Organizations are investing significant amounts of their operational and capital budgets into transformation initiatives that fail to deliver measurable business outcomes, despite well-known failure rates.

With **Process Intelligence**, you can see into the nature of work and identify patterns and opportunities across your transformation investments.

Process Intelligence vs. Conventional Process Discovery Methods

Process Discovery is how we learn about the way our processes work.

One of the most common approaches used by enterprises for process discovery is hiring a consulting firm to conduct an internal business assessment. The consulting firm interviews employees about how a process is completed, as well as directly observing the process, like with a time and motion study.

Typically, this assessment is disruptive to work and delays time to value.

Polanyi's Paradox: "We know more than we can tell."

Relying on team members to self-report how they complete their work? This cognitive phenomenon poses an inherent flaw. Like driving a car, or explaining how one recognizes someone's face, Polanyi's paradox also applies when asking someone how exactly they complete a task or process.

Humans have an intuitive understanding of how to perform a task, but cannot verbalize the reasoning behind it.

As a result, process discovery interviews often miss critical steps within a process that the employee being interviewed is unable to articulate.

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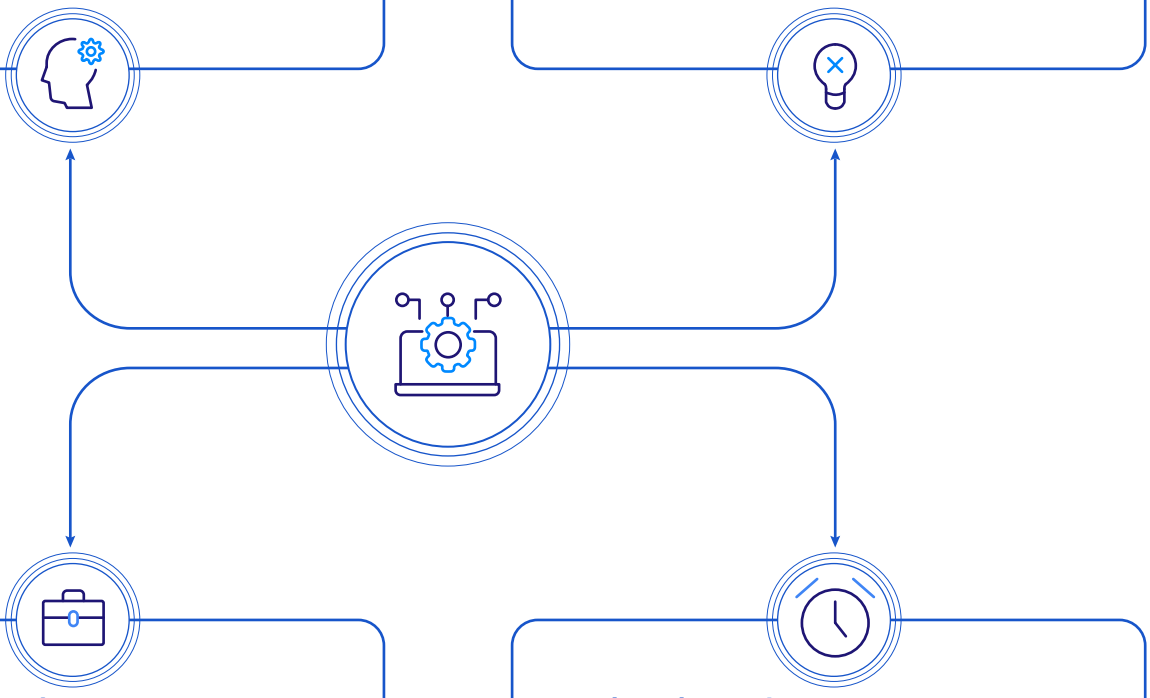
Four Shortcomings of Manual Process Discovery Methods

Limited Perspective

Because interviews typically only involve a small subset of employees, they can only provide a very narrow snapshot of how a process is being completed. As a result, interviews often miss common variations or permutations of how work is actually being done by employees who have not been interviewed.

Biased insights

Consider the role of bias in manual interviewing methods. Employee's responses are subject to various biases including anchoring bias, confirmation bias and conformity bias. This can make interview responses unreliable.



Disruption to work

Interviews can be disruptive to productivity and work, as they involve pulling a company's most knowledgeable employees away from their actual day-to-day job to take part in the interview.

Outdated Results

These consulting projects often take many months to complete. However, processes and work are dynamic and constantly shifting, particularly in the age of digital transformation. As a result, the completed analysis from a consulting project is often already outdated by the time it is delivered.

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See How Other Process Discovery Methods Compare to Process Intelligence

Process Mining and **Task Mining** are incomplete observations, providing a limited view into tasks and activities conducted by humans and systems.

Process Intelligence bridges the gap between insight and action, providing an accurate analysis of activities as they happen. You won't need to wait months for a report. Artificial intelligence can observe actions and make recommendations almost instantaneously, significantly accelerating the decision-making process.



Process Mining

Process Mining tools extract event logs by integrating directly with enterprise software systems.
This tool monitors processes using structured data captured from transaction systems and event logs.

Best for:

Industries such as manufacturing, retail, telecom were the first ones to implement process mining platforms. Their IT landscape was dominated by ERP systems and processes such as order to cash (O2C) and procure to pay (P2P) – which are built on **structured data and transactions with limited human involvement.**

Limitations:

Data quality issues: Event logs often have data quality issues such as incorrect timestamps, noisy data, and missing data attributes.

Integration effort: Because process mining works by analyzing software event logs, it needs to be integrated with the software, which requires up front development effort and support from IT teams.
This can slow down and complicate the rollout of process mining projects.

Many process steps are not visible from an event log: Process Mining can only identify process steps in software that has event logs.

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Task Mining

Task Mining tools apply algorithms to screenshots of specific process steps. This is a technique to discover, analyze, report, and monitor **actions performed and human-system interactions based on data captured from user desktops.**

Best for:

Popularized in the past five years primarily to discover low-hanging Robotic Process Automation (RPA) opportunities. The focus of task mining is to rapidly model the tasks by observing human-system interactions and utilizing these models to accelerate the RPA implementation. **Insights from task mining are limited to discrete tasks at the operator level—not at the process level.**

Limitations:

Limited context within a full process: Because of the restricted visibility task mining provides within the scope of a larger process, it is often not clear where the tasks being analyzed exist within the larger process period.

Not scalable: Due to the computational intensity of the statistical approaches used in task mining, its scalability is limited in terms of the length and complexity of the tasks being analyzed, as well as the number of employees that are part of the analysis.

Inconsistent results: Because of the non-deterministic nature of the statistical approaches used in task mining, it often delivers inconsistent results. This means that the exact same tasks or process steps can be analyzed twice, but deliver varying results.

Legacy Interface readability: Legacy application user interfaces (e.g., mainframe applications) pose a challenge for task mining due to their unreadable nature for virtual agents, hindering the extraction of meaningful insights from these interfaces.

Process Intelligence

Process Intelligence disrupts both process mining and task mining by offering a detailed, real-time, continuous discovery of how people work and operations run.

Best for:

Combining the best of both process mining and task mining approaches with artificial intelligence to create a highly detailed and end-to-end view of business processes.

The Power of Process Intelligence Platforms:

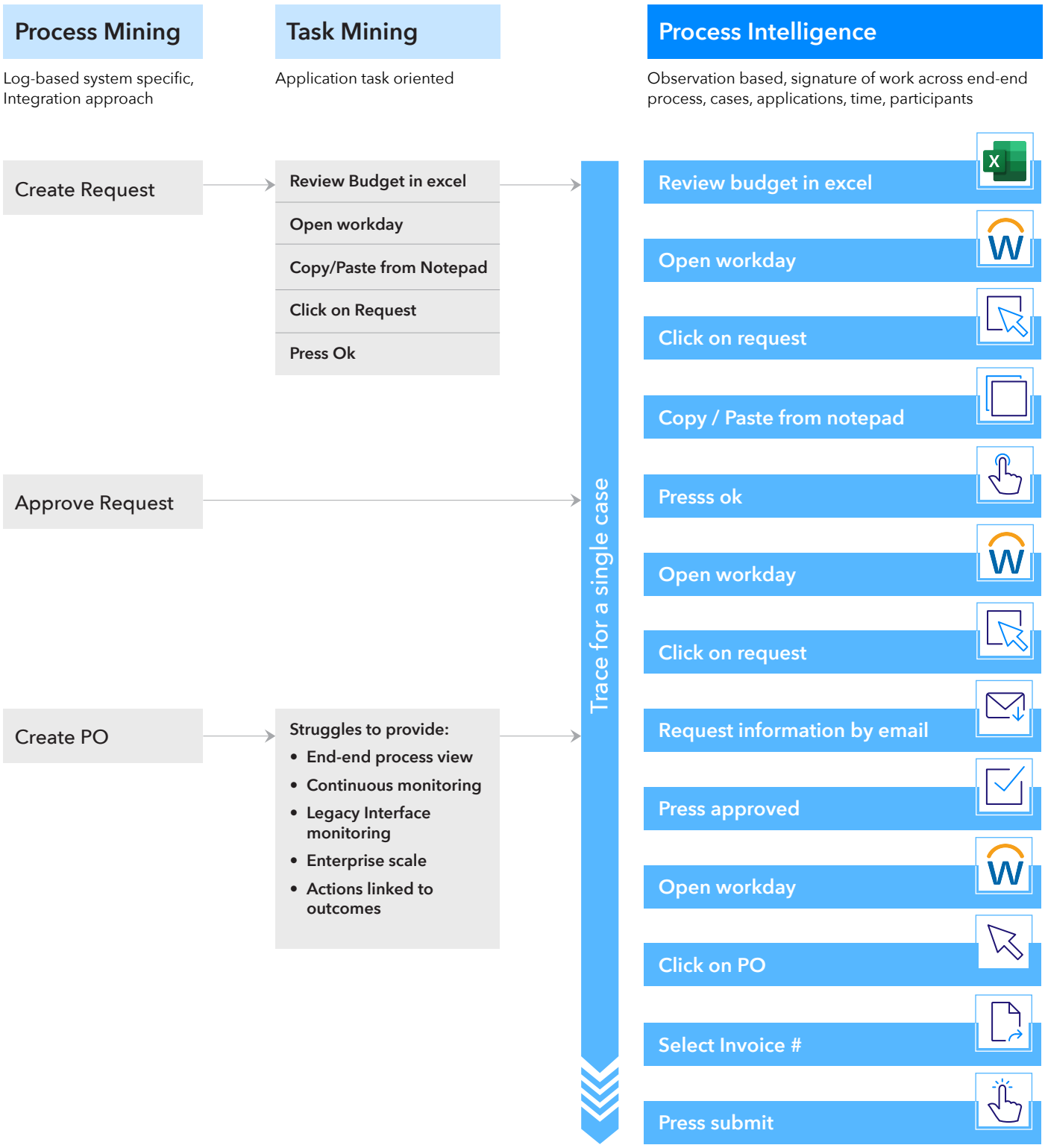
Continuous, real-time view into human activity—doesn't rely on after-the-fact reporting

Zero integrations with back-end systems, avoiding time-consuming and costly data engineering and preparation

Artificial intelligence accelerates speed-to-value

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Process Intelligence at a Glance: How does It Compare to Process Mining and Task Mining?



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The Impact of Generative AI on **Process Intelligence**

According to research, many companies already report that 20% of their EBIT is due to a successful artificial intelligence implementation.

Generative AI is a powerful technology that can alchemize existing data into something novel. It can turn raw sales numbers into a report, turn a string of ideas into cohesive sentences, and provide recommendations based on its own process observations. It also gives machines the power to better understand our intentions – through conversation or clicks – to auto-generate real-time insights.

Combining Gen AI with Process Intelligence facilitates the creation of more sophisticated models that can generate real-time insights, simulate complex scenarios, recommend next steps and even automate actions. This not only streamlines operational efficiencies but also empowers businesses to anticipate and adapt to changing market dynamics proactively.

Process Intelligence Helps Gen AI Speak the Language of Your Business

Gen AI is not specific to one department or function. It applies broad, all-encompassing improvements to efficiency and productivity across every aspect of your organization.

Not surprisingly, one-third of organizations are already using Gen AI and 40% say they'll increase their artificial intelligence investment based on Gen AI's capabilities alone.

You've probably tried one of GenAI's most popular adaptations: ChatGPT.

ChatGPT is a Large Language Model trained on diverse data sources, enabling it to generate responses to a wide range of queries. Process Intelligence platforms employ similar technologies to train models using **Process Intelligence** data. This facilitates the development of a comprehensive knowledge base focused on understanding how people work and how operations are conducted, helping identify efficiencies and pinpoint areas for improvement.

What Happens When Gen AI Learns the Ins-and-Outs of Your Organization

Ask questions of your operations

Don't wait for a report—Gen AI welcomes process owners and team members to host conversations with their operations data. Ask questions, like 'which agents are the most productive?' and receive instant feedback you can act on now.

Find new ways to work with Gen AI

You can also use the power of Gen AI to assess your operations for additional opportunities to implement advanced AI technologies. Process Intelligence platforms can then measure trends, including keystrokes, activity time, and text intensity, to calculate potential ROI on what-if scenarios.

Auto-generate content with user-specific details

Gen AI can automatically draft customer correspondence and auto-fill it with information unique to each customer. This significantly reduces errors and data entry workload.

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4 Benefits of Process Intelligence

That Reach Across Your Organization

According to research, the greatest impact of a major change effort's success comes from an organization-wide commitment and implementation.

Automation, operational excellence, quality & compliance, and future of work readiness are the four imperatives for preparing your organization for long-term success. When you can accomplish these organizational goals, business outcomes will improve across the board.

Each of these four transformation areas require, either directly or indirectly, the accuracy of a data-driven approach to process discovery, analysis, improvement, and ongoing monitoring of human-system interactions.

Succeed through continuous, real-time, detailed data capture that only Process Intelligence can deliver.

1.Get More Out of Automation

57% of organizations are piloting automation projects in at least one business function.

The Challenge

Implementing automation that's based on guesswork, human interviews, or manual discovery is prone to mistakes and misinterpretations.

This leads to failed implementations, error-prone automation workflows, significant bot rework, and missed automation targets.

See How Process Intelligence Can Help You Develop a Winning AI and Automation Strategy

1

Discover, standardize, and optimize business processes before automation

2

Identify automation opportunities and pick the right patterns

3

Define business value, accelerate outcomes, and validate results

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4 BENEFITS OF PROCESS INTELLIGENCE THAT REACH ACROSS YOUR ORGANIZATION

Process Intelligence's Data-Driven Models Improve Success Across 4 Phases of Automation Lifecycle:

1 Discover

Traditional Approach

Manual process analysis and data gathering are time-consuming, error-prone and expensive. Capturing process variation proves challenging when employing analysis-driven modeling.

Process Intelligence

Identify automation opportunities with more accurate process models. Get an exact representation of current state operations to properly reflect the reality of how work gets done.

2 Qualify

Traditional Approach

Lacks verifiable data about people, processes, and technology, resulting in misrepresentation of root cause analysis. These inaccuracies have the potential to throw off ROI calculations.

Process Intelligence

Establish a more robust baseline for current state process KPIs and formulate stronger hypotheses for business use cases.

3 Experiment & Deliver

Traditional Approach

Making the wrong decision on which technology to leverage can result in less than satisfactory outcomes as well as technology debt. With so many different automation tools in the market, it's critical to understand capability differences.

Process Intelligence

Assess new automated technologies in real-time and see how they affect day-to-day operations. Quickly see which tools boost KPIs, and which are falling behind. AI-powered Digital Twins create a replica of your operations where you can experiment with new ideas.

4 Validate

Traditional Approach

The inability to measure verifiable and traceable outcomes against pre-automation baselines could not only render a current project a failure, but it can also result in reduced funding for future automation projects and a decline in leadership credibility.

Process Intelligence

Provides hard data-driven evidence into pre-automation baselines, to establish more solid KPIs. With a stronger, definitive way to present automation's impact to your team, you can earn eager buy-in on future projects.

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2. Support the Continuous Journey to Operational Excellence

78% of business leaders say their top business priority is improved operational efficiency. Explore how Process Intelligence helps achieve this goal.



The Challenge

Unfortunately, most organizations do not know where to start on the journey to operational excellence.

They do not have clear insight into their operations because the legacy process discovery tools they are using have data capture gaps, making it impossible to deliver real-time, actionable intelligence.

Companies must be able to measure performance gaps, like current state metrics compared with targets or benchmarks, to identify root causes, evaluate alternative improvement opportunities, build a business case for improvements, and monitor the impact of those improvements on a continuous basis.

Process Intelligence works differently. It's built to capture processes based on the digital trace of events, providing the most accurate, detailed representation of people, process, and technology over time, and stitching them together within the OPEX framework.

- Data-driven discovery of business processes
- Standardize processes
- Discover, deliver, and control the flow of value to your customers
- Track leading and lagging indicators of operational processes
- Map the chain of activities required to deliver a product or service to customers
- Continuously monitor process and pinpoint bottlenecks for rapid resolution

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3. Exceed Quality and Compliance Adherence

52% of organizations have undergone a compliance audit, underscoring the importance of tracking, reporting, and auditing quality and compliance in real time.



The Challenge

Maintaining quality and service level agreements (SLAs) requires a deep understanding of how well organizations execute business processes at an operational level.

If organizations aren't able to identify trouble spots or bottlenecks, then optimizing them isn't feasible. Reworks not only cost time and money, they negatively affect customer experience. Organizations require the granularity to analyze individual steps and capture unstructured data across human-system interactions before making informed decisions on prioritization. Non-compliance can result in stringent penalties and reputational damage.

While it is possible to track and monitor digitized functions with legacy process discovery platforms, they lack the ability to do so with human-system interactions. This causes gaps across the front, mid, and back offices across industries, but especially in service-oriented industries due to a reliance on human operators.

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4 BENEFITS OF PROCESS INTELLIGENCE THAT REACH ACROSS YOUR ORGANIZATION

Quality Management Systems (QMS): Enhance Outcomes with More Reliable Data

The standard approach to Quality Management Systems, the Plan-Do-Check-Act methodology, relies on quality KPI data to enhance outcomes. The precision of this data directly affects profitability, revenues, and customer experience. For precise and actionable results, it must encompass real-time, continuous, and auditable data on human-centric operations.

Process Intelligence offers this data-centric view to measure SLA adherence, error rate, process variance, first-pass rate, and throughput.

The Plan-Do-Check-Act Methodology

PLAN

Define goals, measures of success,requirements to meet these targets, frequency of measurement, and how to check for the achievement.

DO

Implement plan, execute, make changes, measure, and record the results.



ACT

Implement the actions needed to address any issues found in the check step, such as non-conformances and corrective actions to eliminate the causes of nonconformities.

CHECK

Continuously monitor, measure, analyze, and evaluate the products or services to ensure they meet requirements, the processes used are effective, and customer satisfaction is being met.

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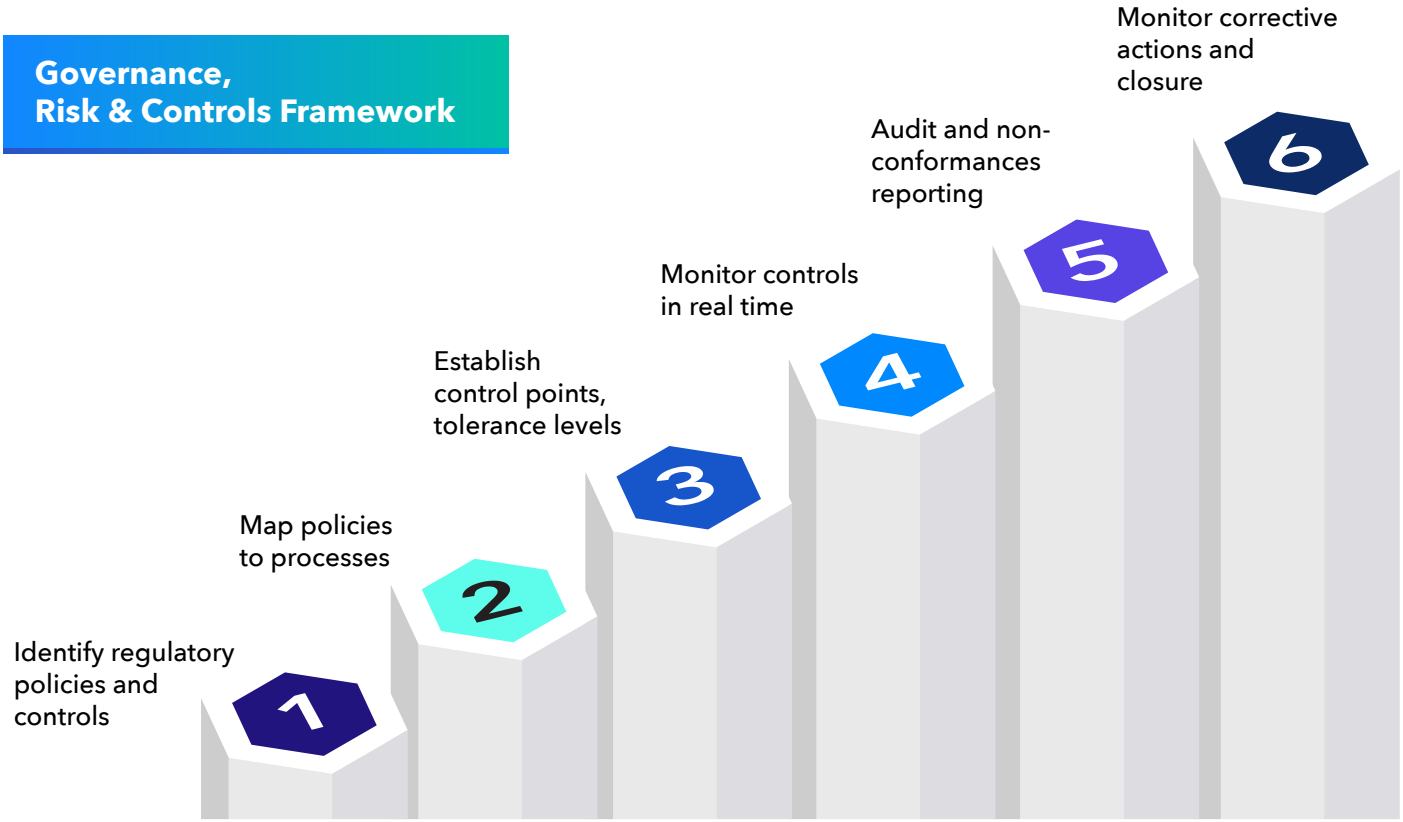
4 BENEFITS OF PROCESS INTELLIGENCE THAT REACH ACROSS YOUR ORGANIZATION

Compliance Management Systems: Track, Report, and Audit Implementation Policies in Real Time

Compliance management involves identifying regulatory policies, understanding where they need to be applied, and being able to report verifiable and traceable data across people, processes, and technology to avoid repercussions.

Process Intelligence is able to track, report, and audit the implementation of policies in real time through observation of every human interaction, including data handled and actions performed.

The systemic representation of how policies are implemented, combined with real-time reporting enables compliance officers to demonstrate empirical evidence to regulators.



- Observe,and report all events across process control points to adhere to SLAs and meet regulatory requirements
- Measure and monitor process quality in terms of defects, variations, and time
- Track how often required steps are being followed to meet conformance standards, audits, and identify improvement opportunities

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4. Boost your Organization's Future of Work Readiness

In 6 out of 10 occupations, one third of activities are automatable. Is your organization preparing for the workplace of tomorrow?

The Challenge

Companies are increasingly focused on the future of work readiness, navigating the uncertainty of current trends, like hybrid work environments, and preparing for the effects of automation and intelligent technologies.

The overarching theme is change.

Effectively understanding the work, the workforce, and the workplace enables organizations to better deliver their value proposition to all stakeholders, build competitive talent competencies, and adapt to the shifting nature of work.

Future of Work

01 Skills Transformation

02 Productivity Management

03 Process Standardization

04 Pay for Performance

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Process Intelligence Plays a Key Role in the Evolution of 'Future of Work' Models

With Process Intelligence, you can construct accurate, detailed process maps that reflect the digital reality of work, deliver key metrics on workforce productivity and process throughput, identify bottlenecks, rework, and unnecessary manual steps and their root causes, and evaluate the impact of interventions on KPIs.

- ☑ Measure employee skills to identify opportunities for training
- ☑ Identify procedural deviations in workflow to bring standardization that supports scalability and efficiency
- ☑ Discover and standardize work to enable location-agnostic teams to work together, providing labor and cost arbitrage
- ☑ Maximize the value delivered by humans within the context of incessant automation
- ☑ Train employees with the skills they need for new jobs that will be defined by human-machine collaboration to maximize their value
- ☑ Address employee experience challenges, such as burnout from difficult, time-intensive tasks, and demand for work-life balance and flexible work options
- ☑ Create digital operating models that will address business continuity, employee integrity, operational efficiency, compliance, and workforce planning

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Your Process Intelligence Starter Kit

According to research, organizations with successful digital transformations report twice the revenue growth over those who missed the mark.

Organizations that invest in Process Intelligence sometimes find the outcomes interesting but struggle to demonstrate real business value.

Knowing how to leverage Process Intelligence and show ROI is key. With vast amounts of data being generated, converting intelligence into decisions and recommendations requires a systemic approach.

Implementation Timeline: What to Expect In Each Phase

Oftentimes, organizations invest in technology solutions without clear guidelines for implementation. Here's a detailed framework that will help you make the most of your Process Intelligence project every step of the way.

The Process Intelligence Implementation Framework

Phases	Activities	Success Criteria
1. Discovery (Ideation & Qualification)	Discover process scope, business challenges, technology and user landscape for "Proof of value" in collaboration with customer stakeholders to establish: • Shared understanding and agreement of scope • Success criteria and value measures • Roles and responsibilities with time commitments	☑ Proposal for "Proof of value" - accepted by customer ☑ SOW & Contract sign off for POV
2. Experimentation (Proof of Value-POV)	• Deployment of Virtual agents and PRISM server as per POV proposal scope • Configuration of solution, data collection and analytics dashboards aligned to POV business value framework	☑ POV & recommendations sign off by customer ☑ Proposal for production deployment ☑ Accepted by customer ☑ SOW & Contract sign-off for production deployment
3. Delivery (Production Deployment)	• Deployment of Virtual agents and PRISM server as per production deployment scope • Configuration of solution, data collection and analytics dashboards aligned to business value framework • Iterative development to align outcomes with business problems • Train business & IT teams with relevant skills in Skan configuration and business value realization	☑ Successful deployment and business value recommendations – sign off by customer ☑ Customer teams enabled to manage platform and outcomes independentlytion deployment
4. Sustain & Scale (COE - Center of Excellence)	Establish Process Intelligence COE – staffed by customer teams and supported by vendor teams with: • Continuous discovery, experimentation & delivery • Lightweight Governance model • Standard methodology, roles and skills • Stable and scalable environment • Expert teams – trained by vendor • ROI model and business value frameworks	☑ Enterprise adoption of process intellgence platform and soltions ☑ Customer teams enabled to manage full life cycle deployment

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How to Demonstrate PI's Business Value

Avoid focusing on narrow sets of KPIs to define business value. Apply a holistic understanding of what metrics can be impacted by Process Intelligence and leverage that power to impact as many KPIs as possible. The below diagram provides workforce, process, and technology intelligence KPIs and the financial outcomes impacted by each.

Leading business indicators (continuous monitoring KPIs)

		Integrated business outcomes (Transformation drivers)			
		Cost	Experience	Complaince & Quality	Revenue
Workforce Intelligence	Utilization	✓			
	Productivity	✓			
	Proficiency	✓	✓	✓	✓
	Quality & Error Rate	✓	✓	✓	✓
Process Intelligence	Turnaround, Wait & Processing Times	✓	✓	✓	✓
	Process Discovery and Standardization	✓	✓	✓	✓
	Unit Cost of Processing	✓			✓
	SLA/ First Pass Rate/ Error rate	✓	✓	✓	✓
Technology Intelligence	Automation Discovery	✓	✓	✓	✓
	Apps Usage and Effort/App	✓	✓		
	Standard vs Non - Std Apps Usage	✓		✓	
	App - Switching Rate	✓	✓	✓	

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How to Pick Your First Use Case



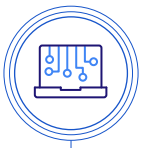
People

1. The operators under observation must represent the entire scope of activities being performed
2. Number of operators under observation should be >20% of the overall group (sample should represent the population)
3. The number of users chosen & the scope of process for observation must be a representative sample of all variants, skills, locations etc



Process

1. The process under observation must have clear data attributes such as a unique identifier **OR** a combination of correlated identifiers, that can be tracked through all steps in the process for the purpose of stitching it together
2. The process should have defined start and stop points (Recommended)
3. The state of the process is clearly identifiable through well-defined parameters (if applicable)



Technology

1. The processes under observation preferably involve multiple applications for execution
2. The processes involve diverse set of technologies (desktop, web, etc.) (Recommended)
3. Guidance on whether the scope of the process includes any mainframe applications



Value Parameters

1. Business sponsors have a clear idea of business challenges that are intended to be solved
2. The associated KPIs for business processes under observation are clearly identified
3. Identification of leading and lagging indicators (with benchmarking if possible) before implementing a process intelligence solution
4. Leading indicators: Turnaround time, Unit cost of production, Effort etc
5. Lagging indicators: Revenue, NPS, Churn rate, etc

⚠ **Use cases that are NOT good candidates for Process Intelligence:**

- Background processing (outside of desktop interactions)
- Batch processing of transactions
- Processes that exclusively use free form work (e.g., web research, editorial work in word or macro-based excel-sheet only process)

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How to Avoid Common Implementation Pitfalls

The promise of data-driven insights on how humans work is a major source of motivation, driving enterprise leaders to experiment with Process Intelligence platforms. However, initial efforts don't always translate into sustainable deployments due to various challenges during and post-implementation. Here's how you can address these implementation challenges head-on :

1. Opt for Process Intelligence over conventional process mining tools:

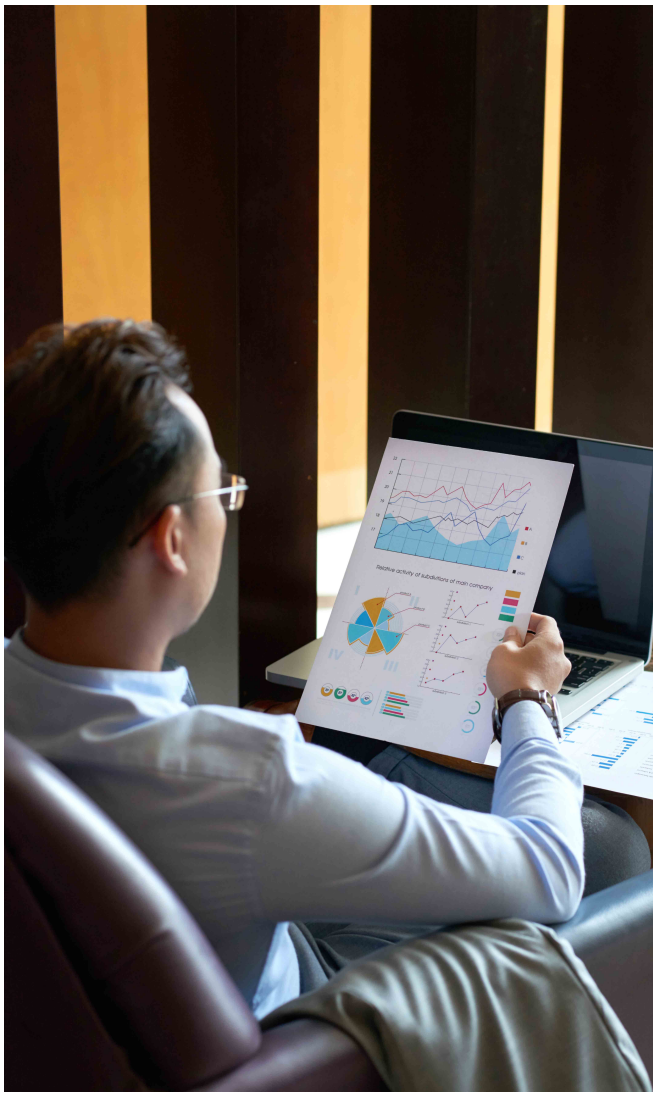
Vendors offer the same set of capabilities, analytical outputs, price points, implementation methods, or deployment requirements. Many firms realize the hard reality of the high cost of integrations or extremely long implementation cycles for traditional process mining tools that doesn't justify the ROI.

- Traditional process mining tools have a pre-condition. You'll need to be ready with well defined back-end databases and event logs with highly structured and defined data models—which most organizations do not have access to.
- Some task mining tools promise observation-based data on how humans work; however, they are not trained on the interfaces (e.g., legacy, mainframe applications) your organization uses, thereby failing to capture the data accurately

Process Intelligence tools collect structured and unstructured data, and aren't beholden to strictly formatted event logs. Process Intelligence is also interface agnostic, able to track behaviors across all software applications.

2. Define what 'value' means to your organization:

How success is measured varies widely by the problems your organization is trying to solve. Defining value in advance is key to the success of any Process Intelligence program.



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How to Avoid the 5 Common Implementation Pitfalls (Cont'd)

3. Adopt a Change Mindset:

Process Intelligence requires a change in mindset to become a data-driven decision-maker, trusting the data from Process Intelligence to drive transformation. Yet, decision-makers can't assume that Process Intelligence will automatically deliver value without incorporating key principles into their thought process.

Mindset Shifts Needed for Successful Implementation

1. Trust the data and throw away biases
2. Learn to question the status quo
3. Look for data- driven patterns and indicators
4. Commit to taking actions based on data insights

4. 'Trust the Data':

The results of a Process Intelligence initiative don't always align with stakeholders' expectations or gut feelings. Preconceptions can lead decision-makers astray, leading them to question the validity of Process Intelligence itself. As you embark on your Process Intelligence journey, be open to trusting the data and taking definitive actions leading to transformation.

5. Invest in the right skills:

When enterprises don't invest in these skills, it is difficult to realize sustainable value from Process Intelligence. Process intelligence initiatives need distinct skill sets across 3 areas:

1. Platform Skills: Deployment, configuration, and monitoring
2. Business Analytics: Data transformation, reports development, and data analysis skills
3. Data-driven Transformation: Understand the intelligence coming out of Process Intelligence and craft the transformation roadmap aligned to business goals

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How to Vet Process Intelligence Platforms

The Process Intelligence market is evolving and many analysts have indicated that it is still in the early stages of maturity. The costly trial-and-error approaches can hurt the credibility of the team and also result in loss of confidence from the budget owners who are expecting rapid value delivery. Don't let that be you—use these detailed criteria to evaluate Process Intelligence platforms and find the one best for your organization.

A	List of Features
	Process and Task Data Capture
A1	Capture process data from all types of applications and interfaces (web, Desktop, Citrix, MS Office, Mainframe, legacy apps, etc.)
A2	Capture end-to-end processes across actors/roles, time windows, and process states
A3	Capture all actions performed by a user such as clicks, copy, paste, Hotkeys, mouse events, etc.
A4	Ability to capture process data attributes like transaction ID, transaction amount, etc. from the screens across all classes of applications
A5	Allow for definition and tracking of productive and non-productive work
A6	Collect data only from selected applications (applications approved/intended for data collection)
A7	Ability to record user interactions for baselining/reference process model (training data set creation), activity labels and establish benchmarks (accuracy in measurement/conformance check)
A8	Identify deviations in observed data in comparison with "baseline versions" captured through recording phase
A9	Anonymize user details, PII, NPI data elements to meet data privacy and infosec needs
A10	Capture clickstreams (record of every action performed on screen by the operator) for audit, compliance and root cause analysis of various KPIs
A11	AI based analysis of every action performed by operators to enable granular depiction of how work gets done, abstract common actions, identify exceptions and provide X-ray analysis of work

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How to Vet Process Intelligence Platforms (Cont'd)

B	**Analytics & Reporting** (Process Intelligence, Workforce Intelligence, Technology)
B.1	**Process and Task Intelligence**
B.1.1	Generate real-time intelligence reports across process and task KPIs along with process data attribute-based filters/grouping
B.1.2	Generate continuous intelligence reports across process and task KPIs – across Time series
B.1.3	Statistical process control reports: standard deviation of processes by turnaround time, processing time, wait time with mean, median, quartile functions
B.1.4	Process model (graphical representation) with: 1. Detailed process steps 2. All paths taken by cases (Variants) 3. Most common path taken by the highest number of cases 4. Activities with highest occurence across variants, highest effort involved (Heat Map)
B.1.5	Unit cost of Process: By employee, product, customer, location ++
B.1.6	Process performance KPI reports – Turnaround time, wait time, AHT
B.1.7	Process quality control reports – Second touches, error rates, SLA
B.1.8	Exportable reports for BPMN process models
B.1.9	Exportable reports for PDD – Process definition document

B.2	**Workforce Intelligence**
B.2.1	Productivity (Units of work processed by an employee/team in a given time)
B.2.2	Utilization (Time spent by employees working on prescribed work applications)
B.2.3	Overtime (Time spent on work after prescribed office hours)
B.2.4	Proficiency reports by tenure – Employee enablement reports

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How to Vet Process Intelligence Platforms (Cont'd)

B.3	Technology & Transformation
B.3.1	Recommend automation opportunities across process steps
B.3.2	Ability to generate PDD for automation purposes
B.3.3	Identify use of permitted and non-permitted technologies for compliance reasons
B.3.4	Provide reporting by applications/technologies used
B.3.5	Provide comparative analysis of time spent by technologies

B.4	Business Outcomes (Effectiveness)
B.4.1	Calculate labor utilization per unit of output and generate unit cost of processing per case (end-to-end)
B.4.2	Calculate differential cost of processing different case types/products/clients
B.4.3	Benchmarking and Measuring NIGO (Not in good order) or (FPR – First Pass Rate) as a % of throughput
B.4.4	Calculating "Total cost to serve" for different customers/products/services and aligning pricing models

C	Actionability
C.1	Ability to set specific thresholds and benchmarks for various KPIs at process and task levels – aligned to regulatory compliance thresholds and audit requirements
C.2	Monitor, report, and trigger actions/alerts, emails or notifications based on thresholds set by users for various KPIs
C.3	Generate exception reporting based on user-defined parameters

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How to Vet Process Intelligence Platforms (Cont'd)

D	Non-Functional Features
D.1	Ease of use and configuration
D.2	Ability to mask user IDs/anonymization
D.3	No Integrations needed
D.4	Ability to export Data
D.5	Compliant with Information security: ISO, SOC2, PCI and HIPAA compliance and Data Privacy: GDPR/CCPA requirements
D.6	Time to Operationalization – In 2 weeks
D.7	Time to Value – In 10 weeks
D.8	Vendor readiness to co-create / co-innovate based on client needs for advanced requirements
D.9	Ability to combine data from other sources to produce advanced intelligence

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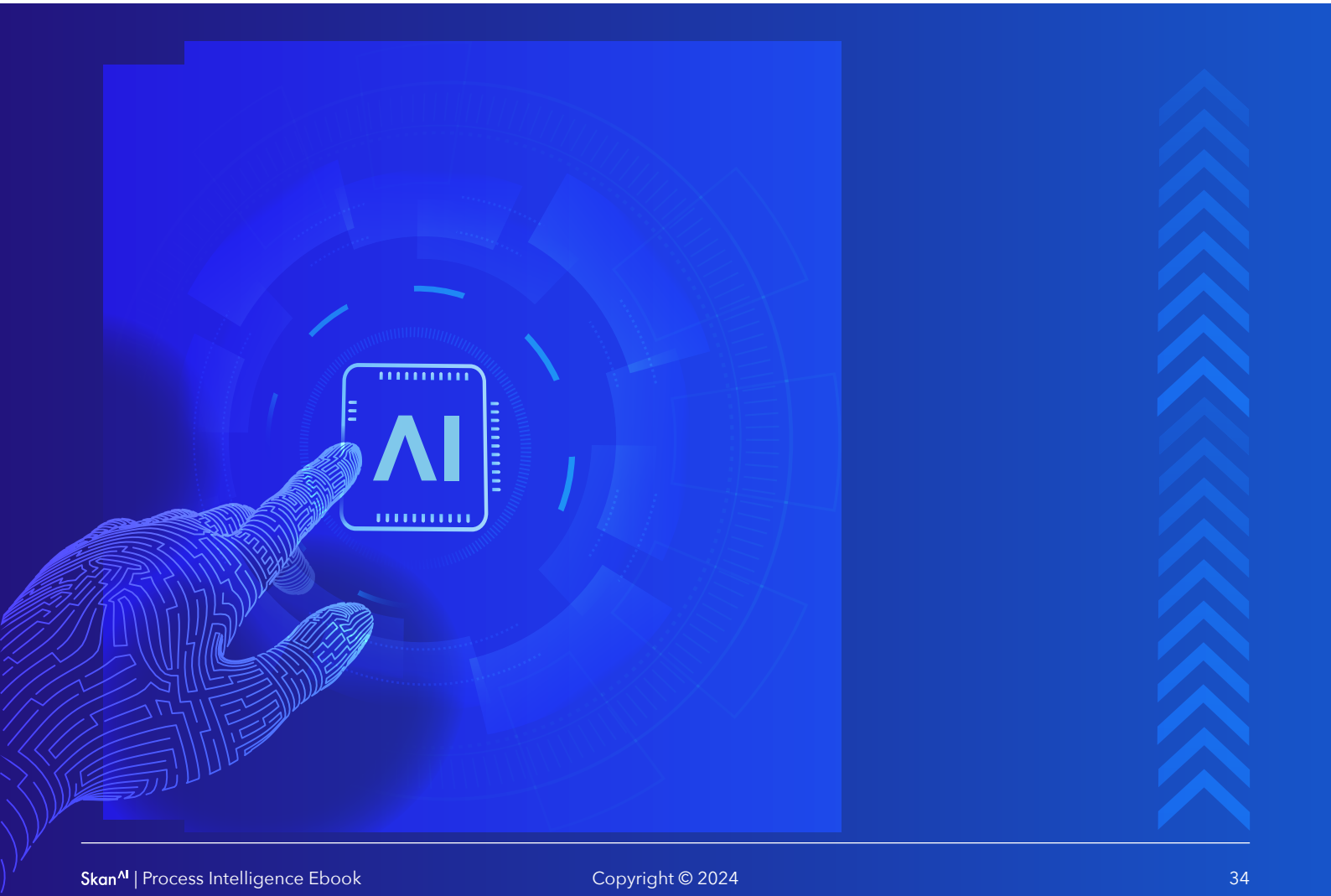
See How Process Intelligence Can Give You a Sweeping End-to-End View of Your Processes

Much like the transition from a static, printed map to a dynamic, real-time navigation app, **Process Intelligence** transforms the way organizations analyze complex data sets, predict future trends, and access more opportune insights.

The journey from traditional process and task mining to advanced Process Intelligence mirrors the evolution from relying on outdated, static methods to embracing dynamic, AI-driven strategies. This shift is not just about adopting new technologies; it's about fundamentally changing your approach to operational excellence.

Process Intelligence provides the tools to not only identify and understand the obstacles and inefficiencies in existing processes, but also to anticipate and adapt to future challenges and opportunities.

It's clear that the road to operational excellence is ever-evolving. Process Intelligence is not just a tool for today's challenges, but a foundation for tomorrow's innovations. Organizations that embrace this dynamic, intelligent approach to process discovery and analysis will find themselves not just keeping pace with change but driving it, navigating their way to success with confidence and precision.



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Thank You!

Learn more about Process Intelligence at Skan's Knowledge Hub, where you can find valuable digital transformation insights that can revolutionize your organization's journey toward operational excellence.

Skan the Possibilities!