



LEARN THE LESSONS

of a successful implementation.



WITH YEARS OF EXPERIENCE

implementing software solutions to drive dramatic business transformation we've learnt a whole raft of lessons which help us to avoid pitfalls when it comes to implementing successful solutions that drive phenomenal results that last.

We've worked closely with the OPX User Group to put pen to paper to document our hard-earned lessons of best-practice and project pitfalls that we have seen time and again. So, whether you're at the beginning of your journey to a modern Back-Office or looking to build on past successes, read our guide to help you along the path to achieve project success and drive dramatic business transformation.

1. SIMPLICITY IN PROCESS MAPPING

Conventional wisdom has seen increasingly complex business process models becoming the norm, attempting to capture every nuance of a business. While such undertakings look impressive, they cannot account for the unexpected, require constant maintenance, lack flexibility and seldom reflect the real-world.

OPX takes a common-sense approach, plotting a linear path and encouraging that real-world adaptability and problem solving that sets great operations apart. Processes are broken down into sensible units of work and any divergence from the linear pathway is captured and made visible to managers.

This is often met with resistance, but simplicity translates into flexibility in the real-world. Businesses can plan for the best but prepare for the unexpected.

Be aware that facts-on-the-ground are often very different.

Documented process understanding is often “idealised”, especially while transitioning from a legacy BPMN world. While many of the major handoffs will be captured, many subtler process interdependencies will be unmapped and unmappable.

Documentation will seldom match facts-on-the-ground and even where it once did, even recently documented process understanding is often outdated as the external pressures on a business evolve.

2. HOLISTIC ACCOUNTABILITY IS PREFERABLE TO WORKING IN ISOLATION

In even the most siloed business, nobody works alone. Transformation needs to include everyone, from mailroom to outsourcers and back again. This ensures accountability and that a customer journey focused approach is taken to steer change in the right direction.

The technical challenge is that no tool does everything from day 1, indeed most businesses prefer a textured IT landscape of several specialist platforms to single one-size leviathans. When optimising in the Back-Office, consideration should be given to the non-process or off-tool activity that will act as a resource sink. The ability to account for handoffs to other departments, partners and customers, and for offline activity like documentary work and peer-coaching provides a much fuller picture of operational capacity to management and business leadership alike.

Don't underestimate the ecosystem

Business processes have often evolved over time. From the original process, generations of tactically orientated workarounds create the tangled web of activities and handoffs that we often see today. Processes have often been optimised, but they were optimised to reflect the drivers of the day.

In reality, this means that different teams, locations and workstreams do things differently, and that each way of working is well suited to the situation on the ground. Such nuances become exceptionally difficult to capture in real-time.

3. INCLUDE OPERATIONAL LEADERS AND SMES

The true experts in the reality of day-to-day operations, team leaders and senior administrators can provide insight that no documentary exercise could replicate. They should be consulted during system set up and empowered to administer their local domains during BAU.

The details of a day-to-day operation will always be governed by the demands placed upon them, not by the constraints of an IT tool. As such, it's important that operational leaders are supported by their technology, rather than being limited by it.

4. REAL-TIME INSIGHT IS A CATALYST FOR CHANGE

Real-Time and accurate information, appropriate to the user, is key to a successful digital transformation because it allows operations to push more autonomy down to area managers and team leaders. Good data removes guesswork from business decisions and promotes new ways of working.

Autonomy in decisions must be backed by accountability. Empowering leadership at all levels while managing risk and keeping a strategically aligned direction of travel.

Industry generic MI is often inappropriate

Pre-built, generic management information dashboards have a place. They can be deployed quickly and are great for external comparisons because they will generally display recognisable metrics, but they shouldn't be relied upon internally, for the simple reason that they have been built with a one-size-fits-most approach.

When optimising the Back-Office, ensure that the data made available reflects the business requirement. As operations evolve, data capture, analysis, and the presented metrics should be constantly reviewed to ensure that they remain appropriate to the operation they are aiming to represent.

5. BUILD MI FOR THE FUTURE, NOT THE PAST

Businesses are unique in the decisions they make, their strategic priorities and their external drivers, so the management information requirement is equally unique.

When looking to optimise a Back-Office, having accurate and appropriate information at all levels become a guideline for aligned performance improvement. Change teams must map the internal and external performance drivers and consider what information is needed to facilitate this. Good MI supports the way the business wants to work, rather than the way it has worked in the past.

Conversely, it is important to acknowledge that perfect management information is almost unachievable so should not frustrate change. Having the right insight into key areas, at the right levels, will often deliver nearly as much value as a comprehensive picture, with a much shorter lead-time.

6. BUSINESS OWNERSHIP AND SUPPORT

Time waits for no-one, and neither do modern businesses. For solutions to keep up with changing business needs, operational leaders must be empowered to make changes and decisions at the operational level of their business. The traditional approach of centralised management and approval is just too slow in the modern workplace. Both operating practices and their supporting technical solutions must be business owned, collaboratively supported by suppliers and internal specialists.

The benefits of empowerment are well documented, in the speed and agility that tactical-level decision making provides, the overall reduced running effort, and the improved engagement of operational teams by feeling valued and trusted. However, uncontrolled empowerment can create its own problems. Decisions should be managed within imposed boundaries, audited and oversight retained to avoid a “wild-west” evolving. Geographically disparate teams are especially susceptible to this.

When in doubt, remember you can delegate authority, but you can't delegate responsibility.

Big returns don't come easy

The status quo is easy; real, lasting positive change isn't. Be prepared to commit to both a short-term project and to long-term continuous improvement. It is as much a mistake to underestimate the size of positive change projects as it is to underestimate their potential benefit.

While technical implementations come with neat, time-boxed plans, people-centric cultural change takes time and attention to avoid slipping back into old habits. When moving towards a culture of excellence, what has always worked may not continue to do so; comprehensive and inclusive change management is your friend if the aim is sustainable business transformation.

7. FOSTER POSITIVE PEER-TO-PEER RELATIONSHIPS

A great way to engage staff, champion performance and make effective use of resources is by building peer-to-peer coaching relationships. In the Back-Office, the highly diverse and often complex array of activities are ideal for this, where staff will often be highly experienced in one area but less so in others and peer-to-peer coaching can be complementary.

It's important to provide staff and team leaders with the right insight into their own and their team's performance to promote coaching and motivate users to engage with the system. This will build both self and peer-motivation to change engrained habits and strive for the best.

8. CAPTURE OPPORTUNITIES AS THEY ARISE

Moving from the Legacy world to a new operating model, plans are written to meet known/existing challenges; however, projects will uncover previously undiscovered opportunities along the way. As these new opportunities present themselves, businesses should capture them as re-engineering opportunities in the project. While there is no mandate to action every opportunity, by understanding the hidden facets of a business the operating model can be refined to better reflect the facts-on-the-ground, leading to improved decision making and greater benefits.

Promote continuous improvement

Back-Office operations are a live environment where rigid documentation is outdated immediately. As such, transformation efforts in the Back-Office must be equally receptive to shifting drivers and priorities. Change teams must be prepared to work iteratively and expect to meet exceptions to the documented models and processes daily.

However, iterative transformation must be consistent in its strategic direction to avoid becoming diluted. Focus should always be on enabling unified people improvement, not endless and academic process re-mapping.

9. BE PREPARED TO CHANGE, TO ACHIEVE CHANGE

Vitality, an operations business operating model, however comprehensive, is a means to an end, not an end. In order to achieve lasting positive change, businesses need to be prepared to change.

Businesses should document the target operating objectives and allow the business model to evolve in order to best achieve them. As projects progress and new information comes to light, it's important to keep these goals in mind while having the flexibility to adapt the route taken to achieving them; agility is key.

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After a of year hard work, we had created our vision of Operational Excellence. We have turned into an organisation which is continuously learning and improving and works in partnership with IT to deliver change. We are, we believe, the epitome of an agile business processing company.

**HCL IBS
Business Process Outsourcers**

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ABOUT US

Founded in 2008, we have more than 35 years of experience in the field; we know the workforce optimisation space like the back of our hands.

The nucleus of the Corporate Modelling development team, based in Glasgow, UK and has been working together for over 15 years providing transformational software solutions to solve key business operations efficiency problems.

OPX is the result of over 200 man years of business focused enterprise software development and was conceived to provide a broad, functional, cost effective and yet easy to implement solution to aid the digital transformation of back office operations.

Every customer is unique. That's why we customise our OPX platform to fit every customer's needs precisely. Our Rapid Deployment Method (RDM) takes clients through the five steps of an OPX implementation in around 30 days.

OPX is proven to increase productivity and utilisation; reduce costs; improve cycle times and enhance customer experience.

The logo for OPX, consisting of the lowercase letters 'opx' in a white, sans-serif font. The 'o' and 'p' are connected, and the 'x' is separate.

For more information about OPX,
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