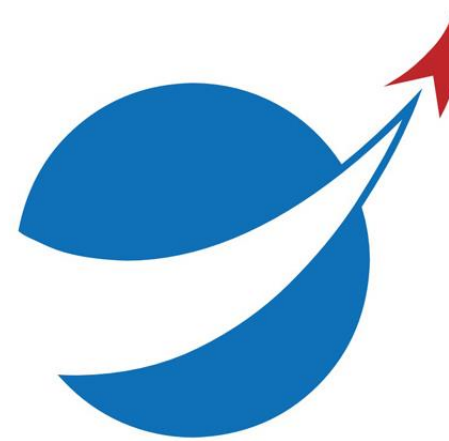


Focus on Your CORE Business

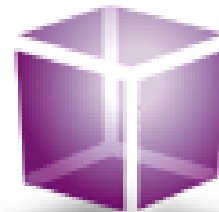
Business Process Analysis



- About Us
- Introductions
- Goals
- What is a Process
- Simple Example
- What is BPA and Why Use It
- Business Example
- Performing a BPA: Techniques, Documentation
- Process Change: Implementation, Adoption
- Partnering
- Business Case Examples
- Q&A
- Thank You



CIO Metrics
Your Tomorrow Today



Cubeworks Inc.
Making IT Your Competitive Advantage

About CIOMetrics, LLC



- ❖ Business process analysis company, based in Cincinnati
 - ❖ Evaluate your IT structure, software platforms, and communications
 - ❖ Identify changes to increase efficiency, reduce costs, increase transparency
 - ❖ Focus on efficient knowledge processing and low-cost solutions that integrate systems without requiring large system implementations
- ❖ **Goal:** Leverage your technology and processes to achieve your goals. We perform as a trusted partner, an exceptional and affordable CIO, to the betterment of your organization
- ❖ **Partners:** Dennis Ulrich, Anil Rajadhyaksha, Mark Budke

About CubeWorks and ITCube



- ❖ CubeWorks is the North American sales and marketing office for ITCube, which is a global technology services, consulting and software development company
- ❖ A Microsoft Gold Partner delivering custom solutions to enterprises worldwide, Specialties include:
 - ❖ Custom .net Development
 - ❖ Mobility Solutions
 - ❖ Software Testing
 - ❖ UI/UX Design
 - SharePoint development
 - Business Intelligence
 - Microsoft Dynamics
 - Technology Consulting
- ❖ ITCube believe in building a long term Trusted relationship with our customers and hence we continuously transform ourselves to offer **thought leadership** which goes beyond technology

CIOMetrics, CubeWorks and ITCube



Mark Budke, Partner

Operations executive with broad experience in strategic operations planning and oversight, and leading diverse teams of software development professionals to industry-leading solutions. Mark has experience with start-up ventures, small businesses and large corporate operations. Mark has a MEd from Vanderbilt University in Human Resource Development

Dennis Ulrich, Partner

Executive expert at assessing, evaluating organizational workforce needs, processes and productivity efficiencies, data-driven decision making and the effective use of Baldrige-based processes and quality tools. Dennis has been the Vice President Workforce Development. Dennis has a Ph.D. in History of Science and Technology from Miami University

Jeshtal Sheth, Head-BPM

20 years of experience in Business Process Management and Consulting. Heads a team of the 500+ people in Business Process Management (KPO, ITES) division, he believes that a strong and innovative team is the backbone of any success. Jeshtal has a Master's Degree in Business Administration, Bachelor's Degree in Science specializing in Physics and Acoustics and is Lean Six Sigma Black Belt certified



Today's Goals

- Use analysis to evaluate processes to gain time to focus on what you do best
- Gain time to focus on your Core business through business process analysis and implementation
- Gain time to work ON your business rather than only in it

What is a Process?



Think About Processes Used in Your Daily Life

- ✓ Identify Some Processes
- ✓ A dictionary definition
 - ✓ A succession of steps to get a result, and the specific order of those steps
 - ✓ **Note:** Procedure is typically a smaller, enclosed type of process, part of a process

Simple Process Example



Getting Ready for the Work Day

- ✓ Set alarm, awake
- ✓ Shower
- ✓ Brush teeth
- ✓ Comb hair
- ✓ Select Clothing
- ✓ Transportation
- ✓ Check traffic
- ✓ Travel
- ✓ Park (if appropriate)
- ✓ Walk to work site
- ✓ Sign in on PC or Clock in

Equipment and Materials

- ✓ Alarm clock, facilities and items for getting ready, way to check traffic, car or other transportation, parking place, etc.
- ✓ Sometimes processes are dependent on prerequisites, such as travel before parking; sometimes not, such as checking for traffic can occur anytime prior to parking (best practice is immediately prior to travel to have the latest information – best practice, but not absolutely required)

What is Business Process Analysis?



Business Process Analysis

A specialized method within business process management (BPM) to analyze whether current processes meet goals. A derivative of the Quality processes created by Dr. Deming and Peter Drucker and others

Process Analysis

- The review and understanding of a process
- Inputs, outputs, procedures, controls, actors, applications, data, technologies and their interactions to produce a result, including time, cost, capacity and quality

Use BPA When

- There are delays or increased customer complaints
- There is a lack of clarity on what to do
- The team wants a process replacement
- Activities are burdensome or unnecessary steps / defects are noted

Why Do Process Analysis?



BPA Value

- ✓ Increased efficiency
- ✓ Time and cost reductions
- ✓ Additional staff time allows more time to
 - ✓ Work on core business needs
 - ✓ Work ON the business versus IN the business
 - ✓ Provides time for a strategy implementation or other projects
 - ✓ Increase in profitability
 - ✓ Reduced overtime and turnover
 - ✓ Less worker stress
 - ✓ Increased competitive advantage

Example BPA



Process for E-Learning Development

Technical Company, process for developing e-learning Training programs

- ✓ Couldn't eliminate core steps in the current procedure
- ✓ Creating an e-learning training program for internal technical support team
- ✓ Work with business units to have expert help (Subject Matter Experts)
- ✓ Send data to programming (Internal or Vendor)

Example BPA – As-Is State



As-Is Process for E-Learning Development

Project Start

1. Conduct Internal meeting with training group to discuss project timelines to ensure programming and graphic teams were available to assist in the project at appropriate times
2. Conduct meeting with stakeholders and possible SMEs to identify the project, define requirements and timelines, development meeting times and possible locations, roles and responsibilities, etc.
3. Kick off meeting noting final decisions on all of the above items

3-5 weeks

Example BPA – As-Is State



As-Is Process for E-Learning Development

Project Development

1. Conduct development meeting, gathering information in MS Word document
2. Return to office, decipher notes and enter them in the storyboard
3. Conduct next development meeting – review revisions, continue working on development of next material
4. Repeat return to office process
5. Conduct next development meeting, review revisions and changes, continue design
6. Repeat return to office process
7. Final Review meeting – review last revisions, thank SMEs for help
8. Repeat office return process
9. Meet with programming and graphics to schedule production work
10. Produce final document

3-6 months

Example BPA – As-Is State



As-Is Process for E-Learning Development

Production

1. Send to production
2. Make any managerial, etc. change requests either due to final revision issues or SME reactions
3. Deploy
4. Work with additional change requests, redeploy, etc. Find learners who took previous version, have them retake the course

1 month

Result

- **Project Total = 7+ months**
- Learners unhappy, vendor unhappy, team stressed, training department leader is called to discuss the issues. Standard outcome for As-Is process

Example BPA – To-Be State



New "To-Be" Process for E-Learning Development

Project Start

1. Conduct Internal meeting with training group to discuss project timelines to ensure programming and graphic teams are available
2. Write project details with requirements and timelines, development meeting times and possible locations, roles and responsibilities, etc.
3. Call or visit each participant to clarify roles and answer questions
4. Conduct Kick-off meeting with final details as first 15 minutes of the initial development meeting. During meeting, work with SMEs to gather information and enter directly into storyboard template with specific wording and acceptable graphic types.

1 week

Example BPA – To-Be State



To-Be Process for E-Learning Development

Project Development

1. Return to office and correct misspellings, text layout
2. Meet with Programming and Graphics, share schedule updates and select images
3. Conduct next development meeting – review storyboard, make changes, continue
4. Return to office and correct misspellings, text layout
5. Meet with Programming and Graphics, share schedule updates and select images
6. Conduct Final development meeting – review storyboard document, make changes, if any, from previous session, continue design
7. Return to office and correct misspellings, text layout
8. Meet with Programming and Graphics, share schedule updates and select images
9. Conduct Final Review meeting – review storyboard, make changes, gain approval
10. Return to office and correct misspellings, text layout

6 weeks

Example BPA – To-Be State



To-Be Process for E-Learning Development

Production

1. Finish storyboard, meet with Programming and Graphics to begin coding and ensure graphics are available to coders

2 weeks

Result

- Project Total = 9 weeks
- \$1,000,000 cost savings, SMEs happy with training department (new phenomena), vendor happy, training dept leader praised, training quality higher, no further revisions required

Process Analysis Effort

- Minimal effort as this was evaluated through the experience of a project and implemented after 2 days of planning

Perform a BPA



How to Perform a Business Process Analysis

Identify the Process to be Analyzed

- Locate something that consumes unnecessary time, causes complaints, people don't know their roles, frustration on the tasks

Evaluate “As-Is” State

- Document what is happening now, who the stakeholders are, what is and what actually is required

Design “To-Be” State

- Based on As-Is findings, define what is desired (To-Be state)

Techniques

- **Gap Analysis** (Find out what information you're missing about the process)
- **Value-add Analysis** (Find if each activity in your process adds value, if not, remove it)
- **Root Cause Analysis** (Find core reasons for a problem, identify ways to fix it)
- **Observation** (Observe the process in action on, note if it works as intended or not)
- **Experience Examination** (Talk to experienced staff for input) using:
 - Interviews
 - Brainstorming
 - Group Discussion

Software and Traditional Tools

Many tools are available to assist, but human interaction and understanding is the best tool

Examples: <https://www.bpminstitute.org/>; Oracle BPM, Zoho Creator, Nintex, KiSSFLOW

BPA Process Documentation



Document the Process

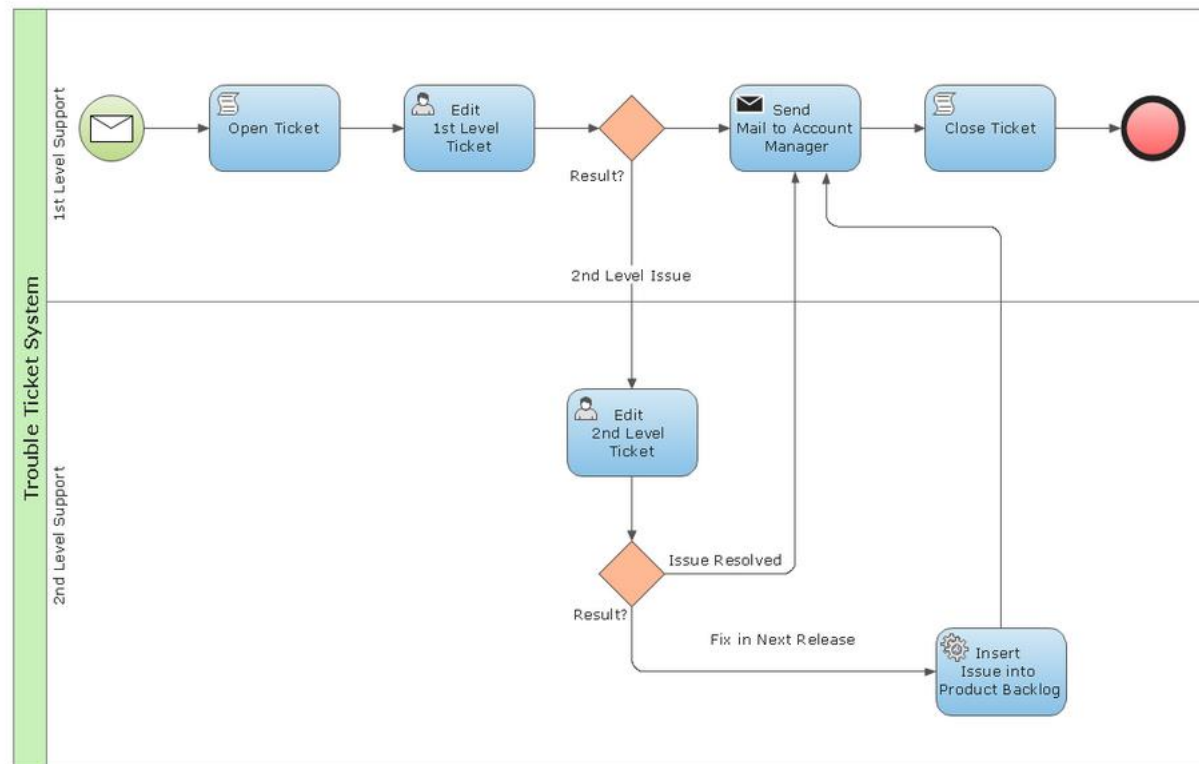
- ✓ Note do this for As-Is and To-Be states (eventually)
- ✓ Introduction (why is the process performed at all)
- ✓ Step-by-step description of the steps (actions performed), main steps first, then sub-steps underneath as documentation continues
- ✓ Who performs each step
- ✓ Note needed Equipment and Materials
- ✓ Conclusion (if necessary to justify the effort)

Process Diagram

Business Process Diagram Example

When the process is complex, there are cyclical actions, or just to simply understanding, a Process Diagram can be used

Trouble Ticket System



BPA Desired To-Be State



Define Improvement Opportunities

Look for areas of change for the “To-Be” state:

- Customer interactions
- High perceived value steps or outcomes
- Bottlenecks and dependencies
- Information or task exchanges between people or systems

Ideal Process Change

- Little to no cost or business impact during change
- Immediate cost savings / ROI
- Staged operational change
 - Prioritize by need and impact, find the “low hanging fruit” that has little or no cost or business impact

BPA Process Change Implementation



To-Be Implementation

You have completed a full or partial business process analysis – now what?

- Define who can perform changes: internal staff or look for partners who can perform the heavy lifting?
- Note CURRENT costs for these activities based on personnel time and cost, and what ELSE the team members could be doing besides unnecessary process steps
- Show how to implement without large infrastructure changes, long timelines, high costs, massive disruptions, etc.
- A staged approach may be best
 - Sub-processes and procedures can be adjusted prior to full process restructuring, if desired. This will show the value of the changes and begin efficiency increases

BPA Process Change Adoption



Change Adoption

Change management is typically required when a change effects many users or high-power users

- ✓ Secure management and user participation early in the process
- ✓ Communicate What, Why and When as early as possible
- ✓ Ensure people know what is being evaluated, why and impacts and when changes are going to occur
- ✓ Large scale projects will need an Executive Sponsor
 - ✓ This will help adoption and participation and financial impacts

BPA and Partnering



Partnering

It may be outside of your expertise to perform a through BPA, if so

- Look for internal or external resources to assist
- Always determine cost vs reward for partnering – internal budgets or external costs

What to Look For

- ✓ Find a reliable, stable partner who can do multiple processes and/or has partners themselves who can perform this work
- ✓ Ensure you have access to the data constantly, and don't have to work through the partner to obtain your data
 - ✓ Have a backup plan if you are concerned about the partner leaving the business you contracted them with, looking for a quick buyout, possible default, possible business closure, etc. always keep your Data

Blatant Commercial!



CIO Metrics – Your Trusted Partner

- ✓ CIO Metrics and ITCube perform BPA on a regular basis



Find the Right People Quickly

- ✓ Focus on interviewing qualified, verified candidates vs. handling the task of the initial steps to locate and screen candidates
- ✓ Hassle-free recruitment process
- ✓ The critical requirements definition is now not complex for you – work with an recruiting process expert to define qualifications and intangibles
- ✓ Have the best, interested and competent candidates sent directly to you
- ✓ Hire individuals or an entire team
- ✓ Have all your recruitment needs completed from job postings on portals and social media to lining up candidates for interviews

Find the Right People Quickly

Qualification Consulting

- ✓ Identify the most desirable candidates – delineate the ideal mix of skills, talent, goals, abilities, and intangibles for each position

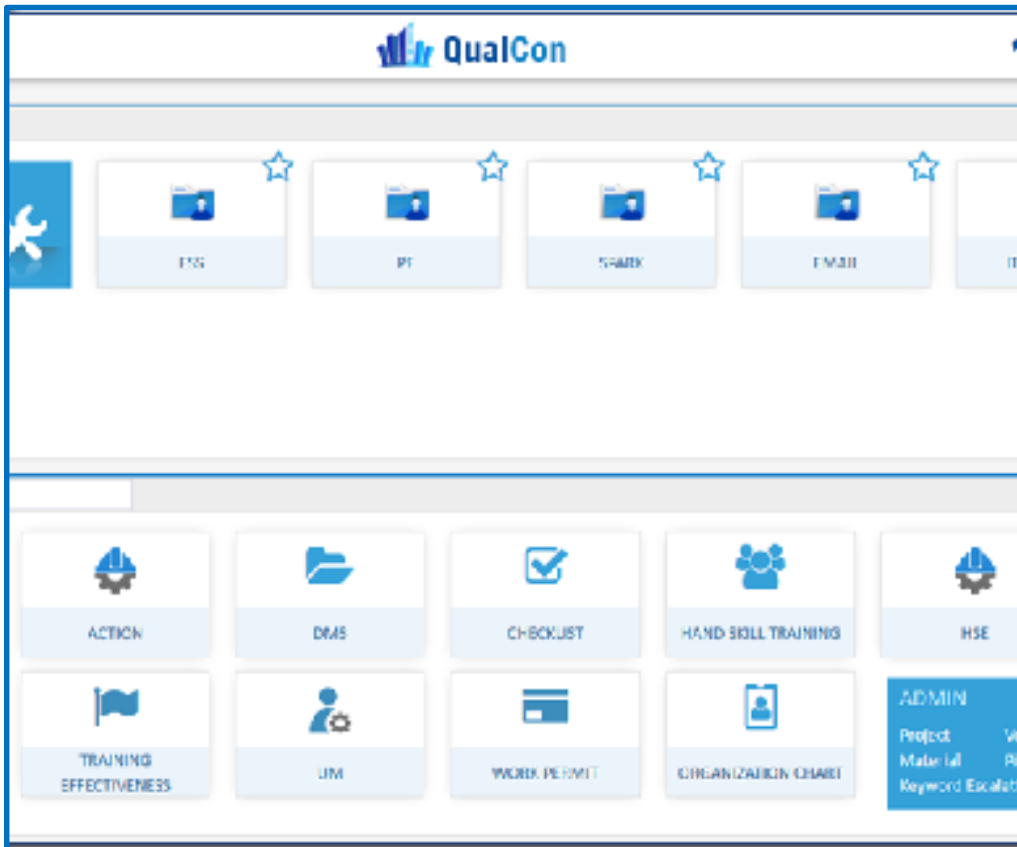
Social Media Branding

- ✓ We work with you to identify the most valuable Social Media locations for brand creation and enhancement – increase your brand visibility via multiple methods

Sourcing Team Coordination

- ✓ A well-coordinated and transparent approach – build a robust pipeline of qualified candidates and an increase in brand awareness

QualCon – Quality in Construction Site Management Software



Your digital vault for safety and quality checklist configuration, data storage, workflows and reports

- ❖ Web and Mobile Application
- ❖ Create and configure various safety and quality checklists
- ❖ Record data
- ❖ Monitor and control safety and quality parameters
- ❖ More than 2000 Safety and Quality department users

Quality in Construction

A Tool for Quality Departments and Auditors

Manage construction projects across geographic locations –custom checklists, observations, inspections

How It Works

Collect specific safety and quality data in real time across multiple sites – reduce risks, escalate via workflows

Collect and Store Data

Training taken, environment review, HSE review, meeting notes, environment review, fire drill compliance

Full Reporting & Dashboard

Customized analytical reporting

Quality in Construction

Drive Quality with Effective Feedback and Control

Senior Management feedback from captured data, customer feedback to nonconformance

Automatic Notifications and Escalations

Regular notifications to users about their pending tasks and escalations via organization structure

Integration

Integrate with systems like DMS, SAP, email, SMS gateways

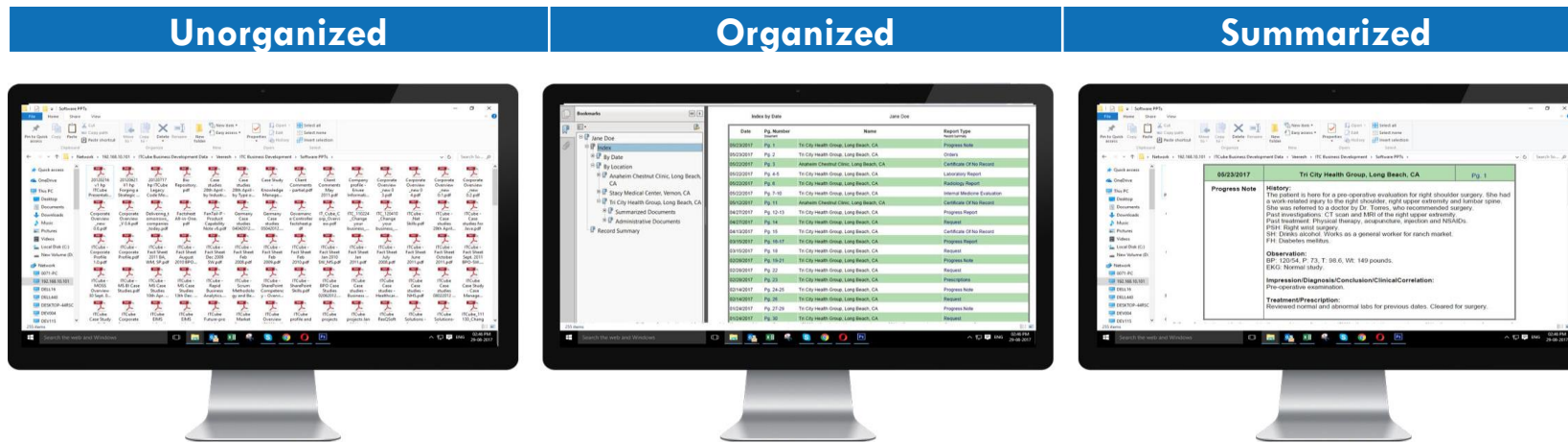
Centralized Document Management System

Documents centrally located with definable access

Medical Records Organization & Summarization



- ❖ Professionally and quickly organized and summarized medical information
- ❖ Robust and intuitive software and services
- ❖ Expedite the complete lifecycle of a claims case with software & services delivered in a clean, easy to use format



Medical Records Organization

Chaos into Order

Systematically organized medical records

- ❖ Index, cross-references, hyperlinks, bookmarks
- ❖ Keyword search – your critical words added
- ❖ Identify complaint history, observations, impressions and treatment
- ❖ Sort by date, visit day and times, report type, provider, treatment type and Date of Loss
- ❖ Missing provider information – identify referred providers when they are not listed in a record
- ❖ Duplicate and admin pages identified, logged
- ❖ Medical professionals review each page, poor scans are no longer a concern



Medical Records Summarization

Uncertainty into Certainty

Professional, concise medical information summarization provides a systematic and structured presentation of a patient's extensive medical data

- ❖ Specialized team of doctors, pharmacists and medical writers
- ❖ Quickly understand a case and claim
- ❖ Original provider documents cross-referenced to the summary
- ❖ 40-day team certification program to ensure quality



Medical Records Organization – Example



Bookmarked | Indexed | Organized | Sorted | Original Document Cross-Referenced

Index

Summary

SAMPLE

Bookmarks ✕

☰ | 📌

- ✓ 📌 Jane Doe
- ✓ 📌 Index
 - > 📌 By Date
 - ✓ 📌 By Location
 - > 📌 Anaheim Chestnut Clinic, Long Beach, CA
 - > 📌 **Stacy Medical Center, Vernon, CA**
 - > 📌 Tri City Health Group, Long Beach, CA
- 📌 Record Summary

Index by Date		Jane Doe	
Date	Pg. Number	Name	Report Type
05/23/2017	Pg. 1	Tri City Health Group, Long Beach, CA	Progress Note
05/23/2017	Pg. 2	Tri City Health Group, Long Beach, CA	Orders
05/22/2017	Pg. 3	Anaheim Chestnut Clinic, Long Beach, CA	Certificate Of No Record
05/22/2017	Pg. 4-5	Tri City Health Group, Long Beach, CA	Laboratory Report
05/22/2017	Pg. 6	Tri City Health Group, Long Beach, CA	Radiology Report
05/22/2017	Pg. 7-10	Tri City Health Group, Long Beach, CA	Internal Medicine Evaluation
05/12/2017	Pg. 11	Anaheim Chestnut Clinic, Long Beach, CA	Certificate Of No Record
04/27/2017	Pg. 12-13	Tri City Health Group, Long Beach, CA	Progress Report
04/27/2017	Pg. 14	Tri City Health Group, Long Beach, CA	Request
04/13/2017	Pg. 15	Tri City Health Group, Long Beach, CA	Certificate Of No Record
03/15/2017	Pg. 16-17	Tri City Health Group, Long Beach, CA	Progress Report
03/15/2017	Pg. 18	Tri City Health Group, Long Beach, CA	Request
02/28/2017	Pg. 19-21	Tri City Health Group, Long Beach, CA	Progress Note
02/28/2017	Pg. 22	Tri City Health Group, Long Beach, CA	Request
02/28/2017	Pg. 23	Tri City Health Group, Long Beach, CA	Prescriptions
02/14/2017	Pg. 24-25	Tri City Health Group, Long Beach, CA	Progress Note
02/14/2017	Pg. 26	Tri City Health Group, Long Beach, CA	Request
01/24/2017	Pg. 27-29	Tri City Health Group, Long Beach, CA	Progress Note

Index Summary

Stacy Medical Center
C/O FERRIS, C/O
 Vernon CA 90058
 Phone: 323 584-0779
 Fax: 323 584-2282

STATE OF CALIFORNIA
 Division of Worker's Compensation
PRIMARY TREATING PHYSICIAN'S PROGRESS REPORT (PR-2)

REPORT TYPE: Request for test or study
Re-check Page 1 of 3

PATIENT NAME & ADDRESS		ACCOUNT NO.	DATE OF INJURY	DATE OF EXAM	FILE NO.	REPORT DATE
		SEX	DATE OF BIRTH	SOCIAL SECURITY NO.	CLAIM NO.	
EMPLOYER NAME & ADDRESS		WORKER NUMBER				
R RANCH MARKET/LONG BEACH BLVD #6 1800-1900 LONG BEACH BLVD. EAST RANCHO DOMI CA 90221		CORVEL / BBSI P.O. BOX 277550 SACRAMENTO CA 95827 <small>Claims Administrator: VILMA BRAGER (909) 218-5778</small>				

SUBJECTIVE COMPLAINTS:
General -
 Current complaint: Here for recheck. Unchanged pain, Right T/L spine, hip, and neck. Denies R shoulder pain. C/o irregular menstrual bleeding, thinks it is related to injury, saw PMD, not related to accident. Worse today from doing home exercises. Does not want any more PT or Acupuncture.
 Problem #1: R>L, low back pain Constant Pain 8/10
 Improvement Problem #1: Unchanged
 Problem #2: Left neck frequent Pain 7/10
 Improvement Problem #2: Unchanged
 Problem #3: Right, shoulder pain RESOLVED
 Problem #4: Right Mid back Constant 7/10 Pain
 Improvement - Problem #4: Unchanged
 Problem #5: Right hip constant pain 7/10
 Improvement - Problem #5: 25% Better

There are Reviewed/intercurrent history.

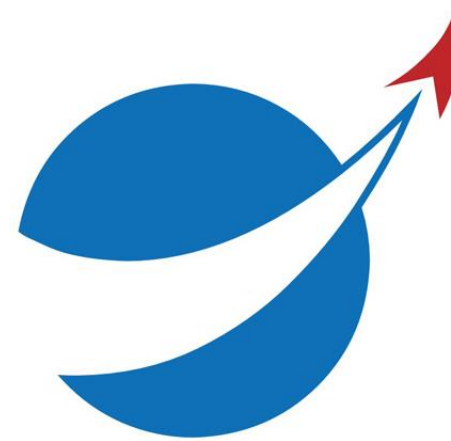
OBJECTIVE FINDINGS:

Q & A



Please let us know any questions you may have!

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10999 Reed Hartman Highway,
Suite # 134, Cincinnati, OH 45242



CIO Metrics
Your Tomorrow Today

Thank You!



Thank you for your attention!

Please contact us for further discussions:

CIOMetrics@ciometricsllc.com | <http://ciometricsllc.com>

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