



Six steps to drive your
process center of
excellence to success

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Find out why you need a center of process excellence

—and how investing in one—can save you time and money while improving experiences for both your customers and employees. Follow this 6-step guide from Nintex to bring the benefits of process excellence to your organization.



If you can't describe what you are doing as a process, you don't know what you're doing.

— W. Edwards Deming
famously said.

What is process excellence, and why should I care?

Process excellence is a work culture built around key business processes. If business processes are broken or non-existent, the business suffers or fails. If processes are strong and well-documented, it affords you the opportunity for continuous process improvement.

Organizations that embrace process excellence view every business process as an asset—one that can be owned, managed, maintained, and governed. And they build improvement into everything they do, such as identifying, codifying, mapping, reviewing, and updating the way things are done across the organization—an approach called process management.



The Process Center of Excellence, defined

This all sounds great—everyone wants their organization to be stronger and run more efficiently. But there's a difference between wanting something to happen and creating an effective system with improvement at its core.

A process center of excellence is a cross-functional entity with a defined organizational structure, tasks, roles, responsibilities, and processes—all supporting and promoting methodical business process improvement across the organization. It develops and maintains a library of standards, methodologies, and techniques that the company can use and reuse to deliver ongoing results.

The process center of excellence focuses on 5 critical activities:



The Process Center of Excellence

WHAT IT IS

An initiative for anyone who wants to be involved

A way to share best practices across workgroups

A repeatable framework with a focus on implementation

An ongoing pursuit

WHAT IT'S NOT

An IT-only clubhouse

Isolated, one-off projects

Theories and concepts that never see the light of day

Intermittent, ad-hoc efforts



***All organizations
are perfectly
aligned to get the
results they get.***

— Arthur W. Jones

Do I need a process center of excellence?

If any of the below sound familiar, they are good reasons to consider creating a process center of excellence in your organization.

Increasing—and more complicated—large-scale digital transformation projects.

Numerous customer-facing processes that touch multiple systems—and where manual- or paper-based work exists.

Large, distributed, and globally diverse teams—each with their own way of doing things.

Pressure to optimize, scale, and grow—without increasing budget or headcount .

Significant IT backlogs that prevent projects from getting off the ground quickly.

Mergers and acquisitions that come with a stream of process changes.

All of these trends contribute to overlapping, disbursed, and daunting business processes. They also offer opportunities for process management, automation, and optimization.

What's at stake?

Without a business process center of excellence, you're likely to end up with:

Scattered, out-of-sync data,
unauthorized processes

Process overlap

Neglected or obsolete
procedure manuals

Dampened agility to execute

Overly complex process
diagrams

No line of business (LoB)
ownership or accountability

Lost opportunities for
improvement

Increased business risk
due to noncompliance

Lack of feedback

Inefficiencies and loss due to
process breakdowns

Lack of process
standardization



***There is nothing
so useless as
doing efficiently
that which
should not be
done at all.***

— Peter F. Drucker

What can process excellence do for my business?

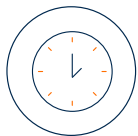
A well-implemented process center of excellence can help your organization:



Improve customer satisfaction



Save money



Save time



Remove inconsistencies



Eliminate waste



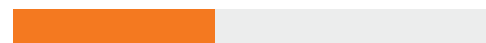
Enterprises that put processes front and center consistently outperform those that don't. They're quicker to adapt to changing business conditions. They're more responsive to their customers. And they're seizing opportunities that are lifting revenue and profitability to a whole new place.

— Gartner

You're not alone.

In a survey of business process specialists across enterprises:

42%



reported that their organizations want to improve customer satisfaction to remain competitive.¹

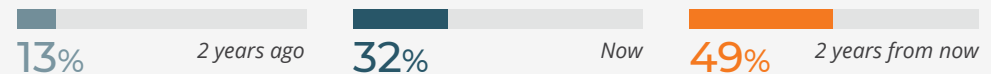
65%



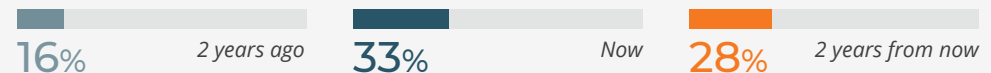
agreed or strongly agreed that Business Process Management technologies have helped their organizations improve efficiency, versatility, and customer satisfaction.²

What's the primary focus of process improvement efforts for the time periods below?

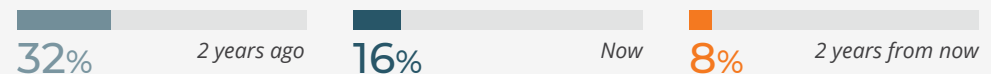
Accelerate digital business transformation



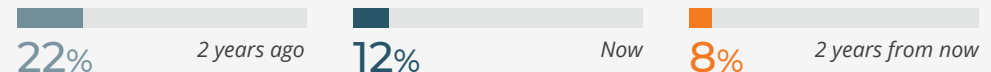
Improve customer experience



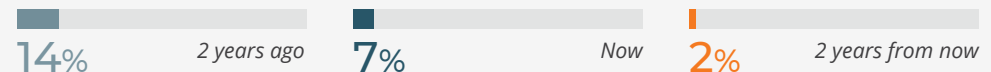
Cost reduction



Improve worker productivity



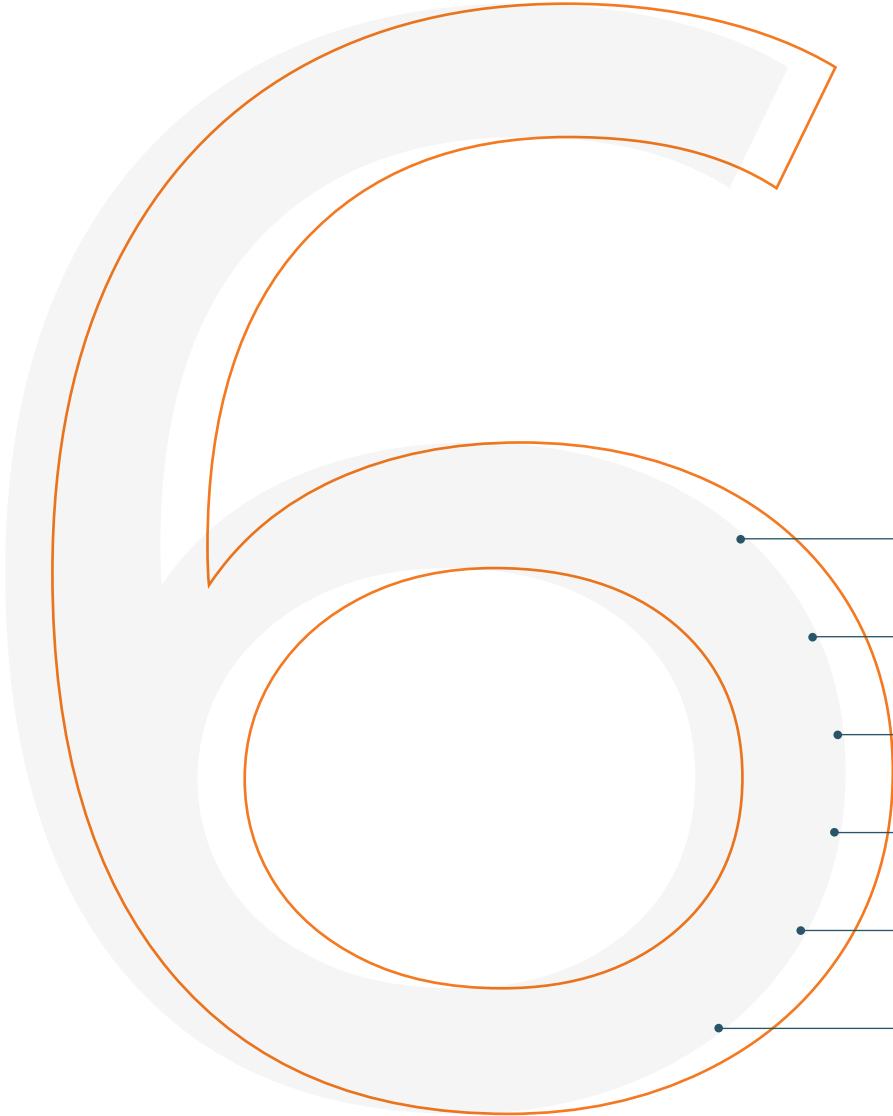
Regulatory compliance



Want more ideas to change your organization's culture?
Check out our [guide to gain leadership buy-in](#).

¹⁻² The State of Business Process Management 2018, A BPTrends Report.
Source: The Growing Importance Of Process To Digital Transformation Forrester report)
<https://www.forrester.com/report/The+Growing+Importance+Of+Process+To+Digital+Transformation/-/E-RES143158>

Six steps to process excellence

- 
- 1 Set yourself up for success.
 - 2 Take inventory and prioritize.
 - 3 Start small and share wins.
 - 4 Use the right tech for the job.
 - 5 Track value and share best practices.
 - 6 Optimize, optimize, optimize.

1

Set yourself up for success

From the onset of setting up your process center of excellence, follow these guidelines to ensure success:

SECURE LEADERSHIP

BACKING. Find a leader, or leaders, who can sponsor your process center of excellence, and get others excited about your vision and goals. Lean on those who are interested, keep them involved, listen to them, and reward them for any and all successes.

CREATE CLEAR

OWNERSHIP. Your process center of excellence must be empowered to work across departments – and even the whole organization. There also can't be competing groups working against similar sets of initiatives. It's incumbent on leadership to clearly communicate responsibilities and ownership.

SET A STRATEGIC

DIRECTION. Align your process mapping with the company's wider business strategy, whether the goal is to improve productivity, reduce costs, increase agility, improve customer journeys, or grow the business.

**ESTABLISH A “CHAMPION”
FRAMEWORK.**

Instead of managing top down, think of your process center of excellence as a web of nodes. Find champions in every part of the business and set them loose to take ownership in the areas they know best. Your job is to give them the tools and training they need – then let them collaborate and get out of the way.

HAVE RESOURCES IN PLACE. Successful process improvements don't just fall from the sky. To stick, they have to start with how people work now, then lead them where they need to go. This means building in time for process mapping, improvement, and automation.

COMMUNICATE AND ENGAGE.

Process excellence is, above all, change management. Keep everyone in the company—not just team members—informed on updates, changes, and wins. If people know what you're doing and why you're doing it, they'll be more inclined to lend their support.

FOCUS ON INDIVIDUALS. Tie process mapping to individual employees' jobs and responsibilities to ensure continuity. Establish key success metrics, then measure it in performance reviews, rewarding those who help move toward goals.

Want more ideas to maximize your process improvement efforts and engage your teams?
Check out our blog on how [Nintex Promapp drives collaboration](#).

2

Take inventory and prioritize

Processes underpin everything people do at work, and influence the outcomes delivered by every department or organization. Before you dive in and start automating and optimizing, you will need to understand the place of a process in the workflow. And to do that, you need to identify, inventory, and map your processes—then choose which ones to improve first.

As you take inventory, don't rely solely on analysis from managers and consultants. Instead, go to the people who do the actual work, collaborate with and ask them why processes happen the way they do, where things are going wrong – and most important, what's needed to help them automate and digitize.

Many times, organizations continue with manual processes because “that's the way things have always been done,” yet the people doing the existing work actually want to find a better way. We guarantee you'll find more than a few savvy, knowledgeable folks who can give you a list of processes that needs improvement, along with some ideas for making it right and where automation would help.



All progress takes place outside the comfort zone.

— Michael John Bobak

3

Start small and share wins

When choosing which processes to map and improve, first identify a handful of manageable, smaller processes that:

INVOLVE ONLY ONE OR TWO DEPARTMENTS.

Many processes cross departments – but find ones initially that are easier to tackle because they involve fewer people and systems. Keep things manageable.

REQUIRE JUST A FEW STEPS. As you search for processes, target the ones that people do every day with a few keystrokes or searching between files. Even when processes involve a small number of steps, the inefficiencies can add up.

CAN HAVE A BIG IMPACT ON YOUR ORGANIZATION. Are you saving someone time? Are you cutting out dollars? Are you simplifying things for customers? Even small changes to simple processes can have substantial impact.

SHOULD BE DOCUMENTED. Too often critical processes are in employees' heads and not well documented. People join an organization or department and learn how processes work by watching and learning from others. What happens if people leave? How do we maintain compliance and reduce risk? These are the processes to tackle first.

ARE RIPE FOR AUTOMATION OR DIGITIZATION.

Many processes stay manual because there's a perception – and perhaps some reality – that it will be harder to involve IT and purchase and learn software than to just keep things the way they are (even if it takes a little extra individual time). With the growth in no-code software – sometimes referred to **citizen developer** – it's easier than ever to automate processes.

HAVE A CLEAR, MEASURABLE UPSIDE.

This is not just cost savings or increasing revenue – there are many ways to measure the upside of improvements. But it does mean that you'll need to track and provide results – which in turn will help with buy in for additional automation efforts.

Then choose one or more—and get to work.



***We are what we
repeatedly do.
Excellence, then,
is not an act, but
a habit.***

— Aristotle

4

Use the right tech for the job

Getting your entire organization to adopt process improvements takes communication, leadership, and focus—along with the right technology. You'll need a set of simple, intuitive, and engaging tools and software solutions that help employees understand, map, and manage processes—no previous expertise or coding skills required.

Look for:

**A CENTRALIZED PROCESS
DOCUMENTATION
REPOSITORY**

**A COLLABORATION
AND COMMUNICATION
PLATFORM THAT GIVES
USERS EASY CHAT,
MESSAGING, MEETINGS,
AND FILE STORAGE**

**A METRICS-BASED
DASHBOARD**

**DATA
VISUALIZATION
TOOLS**



*Plans are
nothing, planning
is everything.*

— Dwight D. Eisenhower

5

Track value and share best practices

To build credibility and keep everyone excited about process improvements, share your progress. Document key performance indicators (KPIs) and metrics, calculate return on investment (ROI), and share the results with the broader organization.

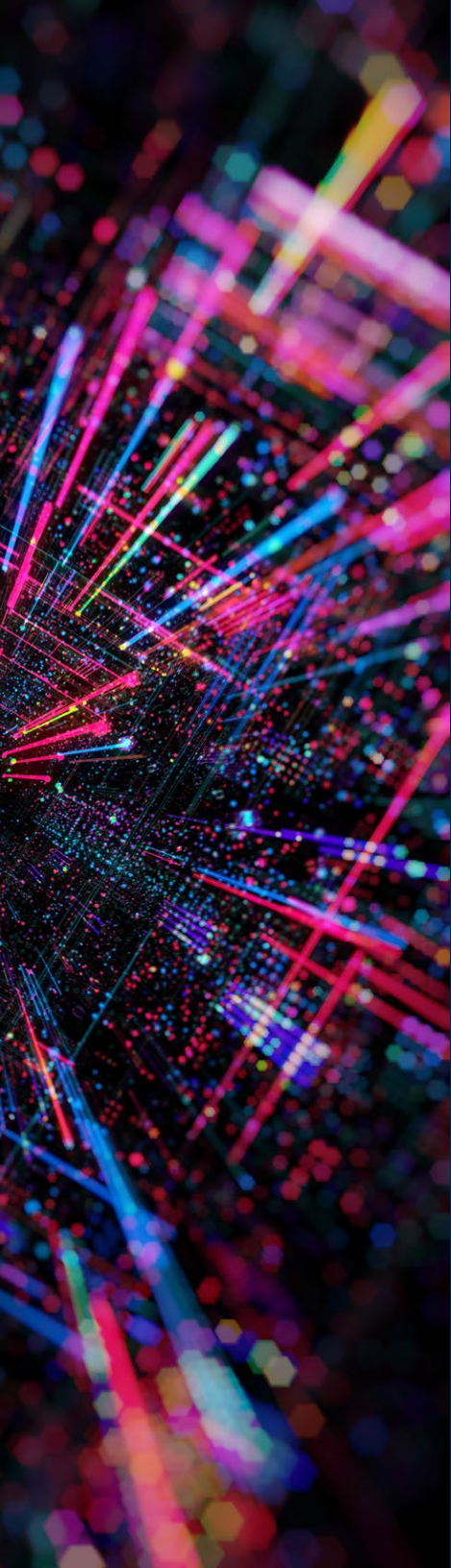
It's not always easy to determine ROI—particularly when it comes to optimizing processes for information workers or human resource professionals. To focus on what's important, ask yourself:

**HOW DOES EACH NEW
PROCESS ENHANCE
PRODUCTIVITY, CUSTOMER
SERVICE, OR LOGISTICS?**

**ARE EMPLOYEES
SPENDING LESS TIME ON
ROUTINE, TEDIOUS, OR
REPETITIVE TASKS?**

**DO SIMPLER PROCESSES
TRANSLATE TO LOWER
TRAINING COSTS AND
LESS TIME?**

**HOW ELSE DOES
THE NEW PROCESS
SAVE MONEY?**



Digitally transform faster with Nintex and Microsoft

Did you know that organizations in every major industry are digitally transforming faster, thanks to the combined power of Microsoft and Nintex cloud technologies?

The Nintex Process Platform provides easy-to-use and powerful capabilities to ops and process professionals for managing enterprise-wide business processes and automating workflows with clicks, not code.

Nintex cloud solutions are designed to:

INCREASE business efficiency and digital transformation

ACCELERATE results through the rapid deployment of process apps

IMPROVE worker productivity and create a culture of innovation

With the breadth of Microsoft's productivity tools, customers benefit further with visual process mapping solutions like Nintex Promapp® that enrich experiences with more dynamic processes, increased shareability, and more clearly delineated process ownership.

Additionally, the suite of Nintex automation solutions enhance Microsoft's Modern Workplace experience with tools that are uniquely positioned for customers who want to quickly and easily deploy workflows, across simple to sophisticated use cases, to deliver rapid ROI.

Automation tools include Nintex Workflow and Forms for O365 and SharePoint, DocGen®, and Nintex Sign™ powered by Adobe Sign and Nintex RPA.

6

Optimize, optimize, optimize

Process improvement is a journey that requires constant optimization. To succeed over the long haul, you'll want to ensure your processes are optimized.

ENCOURAGE your process participants to continuously look to improve processes – replicate ones that work well and make changes to ones that are not delivering the desired outcomes.

ENGAGE your entire organization to seek process excellence with every process to positively impact every aspect of the business.



*Even if you are on
the right track,
you'll get run
over if you just
sit there.*

— Will Rogers

Real-world results

96%

of survey respondents measuring ROI reported a positive return on their investment in process excellence...

WITH
55%

showing a

2x return or more.³



³Global Business Process Management Report, Capgemini.

Process excellence in action

UC Berkeley

ORGANIZATION

University of California, Berkeley

HEADQUARTERS

Berkeley, CA

INDUSTRY

Higher education

THE NEED

Business processes at UC Berkeley lacked:

- Transparency
- Documentation
- Consistency
- Adherence
- Ownership and accountability

To support better education, research, and community-service decisions, the nation's top public university needed to become a process- and metrics-based organization.

THE SOLUTION

Nintex Promapp helped UC Berkeley map step-by-step procedures, job aids, forms/ attachments, images/videos, links to policies, reference content, and many other processes, across departments and job types.

THE RESULT

- 100+ users trained as "content creators"
- 450+ processes documented
- Continuous improvement in departments across three different units
- Employee buy-in to new processes and practices



***People support
what they help
build.***

— *Berkeley Business Process
Management office*

Process excellence in action

Toyota Financial Services

ORGANIZATION

Toyota Financial Services

HEADQUARTERS

Australia

INDUSTRY

Financial services

THE NEED

The customer-financing arm of the global automaker had no central repository for, consistency in, or governance over the organization's many processes. Process maps (in formats including Excel, Visio, PowerPoint, and more) were not centrally tracked or stored.

THE SOLUTION

Nintex Promapp delivered the central repository, consistency, and governance the company needed, in one easy-to-use cloud-based tool. Far less audit support needed translates to significant savings of both time and money.

THE RESULT

Toyota Financial used Nintex Promapp to capture more than 1,000 processes in a single repository—streamlining audits, managing risk, and generating AUD \$2M worth of process improvements.



***Nintex exceeded
our expectations.***

— **Martin Leach,**
*Business Process Improvement
Manager, Toyota Financial Services*

Process excellence in action

Equilibrium Financial Planning

ORGANIZATION	HEADQUARTERS	INDUSTRY
<i>Equilibrium Financial Planning</i>	<i>Cheshire, England</i>	<i>Financial Services</i>

THE NEED

As Equilibrium Financial Planning's client base grew to more than 1,200 managed accounts, various approaches used by the company's multiple advisors posed the risk of inconsistent customer service and costly mistakes.

THE SOLUTION

Equilibrium leveraged Nintex Promapp to standardize and manage processes more efficiently, including client onboarding and document management while facilitating better communication across the company.

THE RESULT

Since implementing Nintex Promapp, Equilibrium has mapped nearly 300 processes with over 200 processes published and in use. The tool is widely embraced across the firm, with more than 11,000 process views to date. They have also achieved a consistent client onboarding process and faster response times.



We are heavily regulated. If someone makes a mistake that costs a client money, we always put it right. We've found that mistakes made through poor understanding of processes can cost the business a lot of money.

— **Toby Ellington,**
Head of Systems & Processes
Equilibrium Financial Planning

Powerful process improvement tools

Ready to put the right tools to work to create your process center of excellence? With the easy-to-use and powerful capabilities of the Nintex Process Platform, including Nintex Promapp for visual process mapping, your organization can quickly unlock your process improvement potential.

SIMPLIFY PROCESS MAPPING. Clear, simple navigation, dashboard, and process ownership tools make Nintex Promapp intuitive and easy to use. Customize the user experience, or perform simple process editing with no training required.

EXPERIENCE REAL-TIME FEEDBACK AND COLLABORATION. Personalized dashboards, one-click process feedback, and change logs encourage team engagement. Collaboration tools include RACI tables that update automatically, alerting stakeholders to any changes.



STREAMLINE PROCESS VARIATION TRACKING. Configurable lists with highlighting process variation and cost reporting support collaboration between global and local process owners.

APPROVE CHANGES WITH ONE CLICK. Configure approvers, stakeholders, and editors, with “awaiting approval” lists. Keep track of version changes, with change highlights, permanent version control, and restore points.

About Nintex

Nintex is the global standard for process management and automation. Today more than 8,000 public and private sector clients across 90 countries turn to the Nintex Platform to accelerate progress on their digital transformation journeys by quickly and easily managing, automating and optimizing business processes. Learn more by visiting www.nintex.com and experience how Nintex and its global partner network are shaping the future of Intelligent Process Automation (IPA).

