

About the Excellence Awards

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The prestigious **Global Excellence in Workflow Awards**, now in their twelfth year and competed on a global basis, are highly coveted by organizations that seek recognition for their achievements. These awards not only provide a spotlight for companies that truly deserve recognition, but also provide tremendous insights for organizations wishing to emulate the winners' successes.

The WfMC, Giga Information Group and the Workflow And Reengineering International Association (WARIA) joined forces to honor organizations that have demonstrably excelled in implementing innovative solutions to meet strategic business objectives.

The criteria for submitting an entry are fairly simple: the project should have been operational for six months prior to nomination, and have been installed within the past two years. The submission guidelines, however, are more detailed. To be recognized as winners, companies must address three critical areas: excellence in *innovation*, excellence in *implementation* and excellence in strategic *impact* to the organization.

Innovation encompasses the innovative use of technology for strategic business objectives; the complexity of the underlying business process and IT architecture; the creative and successful deployment of advanced workflow and imaging concepts; and process innovations through business process reengineering and/or continuous improvements.

Hallmarks of a successful implementation include extensive user and line management involvement in the project while successfully managing change during the implementation process. Factors impacting the level of difficulty in achieving a successful implementation include the system complexity; integration with other advanced technologies; and the scope and scale of the implementation (e.g. size, geography, inter-company processes).

Impact is the bottom line, answering the question "what benefits do imaging and workflow deliver to the business?" Examples of potential benefits include: productivity improvements; cost savings; increased revenues; product enhancements; improved customer service; improved quality; strategic impact to the organization's mission; enabling culture change; and—most importantly—changing the company's competitive position in the market. The visionary focus is now toward strategic benefits, in contrast to marginal cost savings and productivity enhancements.

While successes in these categories are prerequisites for winning a Global Excellence in Workflow Award, it would reward all companies to focus on excelling in innovation, implementation and impact when installing imaging and workflow technologies. Without doing so, they will not achieve the full potential that workflow offers. Companies must recognize that implement-

ing innovative technology is useless unless the organization has a successful implementation approach that delivers—and even surpasses—the anticipated benefits.

True visionaries are not content with merely achieving benefits; they are proactively driven to raise the standard for excellence in their industry—in essence, moving the competitive goalposts.

GUEST CHAPTERS

To add depth and meaning to the case studies, leading industry analysts and experts were invited to contribute chapters from their respective perspectives.

- **Global Excellence in Workflow Award Winners 2003: Analysis**

Roger Whitehead, Office Futures, United Kingdom

This chapter offers a comparison of the case studies that went through to the finals of this year's selection. Whitehead's intent was to see what one could learn from them about the present state of applying process management tools.

He looked mainly at the way these products were used rather than at the details of what they ran on or with. If for no other reason, any such technical analysis would get out of date quickly.

Implementation lessons are longer lasting. Geography, industry sector, suppliers and analyses of ROI are examined in detail. An examination of the finalists' cases printed in this book shows that self-criticism among users and suppliers is refreshingly common.

- **Controlled Agility: An Answer to a Classical Dilemma in Business Process Automation**

Martin Ader, Principal of Workflow & Groupware Strategies, France,

and author of the highly acclaimed *Comparative Analysis of Workflow Products*, looks at how process automation tools explicitly represent the process definition and maintain it separately from the application code with the assistance of powerful graphical tools. In doing so, process automation provides a high degree of agility to the automated processes by facilitating the maintenance of the process definitions. On the other hand, when applied to mission-critical processes, process automation is expected to control the precise execution of processes as prescribed and only as prescribed. In order to satisfy that goal process engines must rigidly apply the unique process definition in force to all the process instances.

Product examples will be shown with TIBCO InConcert, Staffware, FileNET P8 BPM Suite, W4, and i-Flow. Finally consequences of those new features on business process analysis will be highlighted.

- **The Third Wave of Digitization**

Howard Smith is Chief Technology Officer (Europe) of Computer Sciences Corporation (CSC) and co-chair of the Business Process Management Initiative (BPML.org) and Peter Fingar is an Executive Partner with the digital strategy firm, the Greystone Group.

In this chapter, extracted from their best-seller book *Business*

Process Management: The Third Wave, Howard Smith and internationally acclaimed co-author, Peter Fingar, herald a breakthrough in process thinking and technologies that utterly transforms today's information systems and reduces the lag between management intent and execution. How important is this to business? Here's a line from GE's current annual report: "[process] Digitization represents a revolution that may be the greatest opportunity for growth that our company has ever seen."

By placing business processes on center stage, corporations can gain the capabilities they need to innovate, reenergize performance and deliver the value today's markets demand. A process-managed enterprise makes agile course corrections, embeds six sigma quality and reduces cumulative costs across the value chain. It pursues strategic initiatives with confidence, including mergers, consolidation, alliances, acquisitions, outsourcing and global expansion. Process management is the only way to achieve these objectives with transparency, management control and accountability.

- **The Problem with Process Management Standards**

Jon Pyke, CTO, Staffware, United Kingdom, and Chair, Workflow Management Coalition

Jon Pyke takes a straightforward look at five major assumptions being made by product vendors about what the users of process technology need and want to do. He discusses Process Management standards, where and how they are needed—or not. He urges users to get involved in the standards debate and why. If they do not, they will get the standards they deserve, not the standards that they need.

THE CASE STUDIES

We are most fortunate to have read *all* the submissions for the Excellence Awards—not just the winners. Having combed through hundreds of submissions over the years across many countries and continents, we can clearly discern patterns in how companies achieve excellence. While not all companies share each and every characteristic, there is enough commonality to detect distinct paths for achieving excellence. When several of these characteristics are combined in a single installation, they often result in visionary companies moving the competitive goalposts for their industries, as you will read in the following case studies:

NORTH AMERICA

Apex Communications Inc. Canada—Finalist

Maintaining quality, productivity and customer service in a growing and complex high volume/low margin wireless equipment repair and warranty business was the challenge facing Apex Communications (Team Apex). Team Apex implemented a Teamplate Business Process Workflow Solution to improve communications both internally and in the supply-chain, to provide productivity tools to information workers and to provide real time

management information to introduce accountability and to facilitate better decision-making. Implemented in June 2002, Team Apex's workflow solution has delivered measurable results.

CHEMCENTRAL Corporation, USA—Finalist

Acting on a newly implemented operating strategy designed to expand and enhance its customer and market focus, CHEMCENTRAL, a leading global chemical distributor, recently put into operation a new private network-based workflow solution to automate document distribution to and from its trading partners and customers. The service, offered by ADEXS Inc., is being utilized as a means to reduce internal document processing costs, enhance customer service and improve response time to customer requests for quality control/conformance documents such as Certificates of Analysis (COAs) and OSHA-regulated compliance documents such as Material Safety Data Sheets (MSDSs).

International Truck and Engine Corporation, USA—Gold Award

International Truck and Engine Corporation® is the \$6.7 billion dollar operating company of Navistar International Corporation. It has the nation's largest market share in medium duty (class 6-7) trucks. Like any company operating in a mature industry, International feels the effects of economic change. But, in addition, it faces growing threats to its business position from a large list of competitors. So, International faces the same onslaught experienced by U.S. automakers two decades ago, but this time, the results may be entirely different.

To maintain its market position and sustain its profitability, International has launched a new product development process to speed the introduction of new truck models, reduce rework and sharply cut costs.

Tetra, USA—Finalist

Tetra manufactures hundreds of aquarium-related products for fish-keeping, reptile- and amphibian-keeping, and water gardening. Any changes to product designs have to be approved by a number of departments before the final product is manufactured. Tetra wanted to automate the steps required to process these Engineering Change Notifications (ECN). By implementing a business process management (BPM) solution from Metastorm, Tetra was able to streamline the ECN procedure, eliminating the delays and errors associated with the manual process, and refocusing the design and manufacturing units on efficient product development.

LATIN AMERICA

Sonae Distribuição Brasil, Brazil—Gold Award

This paper describes the experience of the implementation of the workflow technology in Sonae Distribuição Brasil (SDB), the third biggest retail group of Brazil. Its primary focus was based on cost control but later workflow technology expanded to the point of establishing a new management corporation paradigm. Thus, not only one workflow system was developed, but a set of them (10 systems in production on January 31, 2003). The achieved outcome was way beyond the expected, resulting in significant savings for

the company. This, added to the enthusiastic acceptance of the technology by the users, placed the workflow technology as an essential tool for the company management.

MIDDLE EAST AND AFRICA

Professional Provident Society Insurance Co. Ltd., South Africa—Gold Award

The Professional Provident Society of South Africa (PPS) was established in 1941 to provide sickness and disability benefits to graduate professionals in times of need. Membership is restricted to professional persons who satisfy the company's eligibility criteria. Since 1941, PPS has grown to provide for the needs of over 70 percent of South Africa's graduate professionals. In 2001, PPS was transformed and PPS Insurance was registered to provide sickness and disability benefits as a long-term insurance company.

To become, and remain, competitive in this environment meant that PPS Insurance had to optimize its current line-of-business (LOB) systems. The company had to increase productivity, providing cover for its policyholders in the shortest possible time. Introducing workflow automation not only resulted in improving, streamlining and accelerating the flow of information at a reduced cost, but also in re-motivating employees, who now provide better results more quickly.

PACIFIC RIM

Korea First Bank, Korea—Gold Award

With the introduction of a workflow system, the Korea First Bank has succeeded in the swift centralization of scattered loan processing systems and the integration of various legacy systems in the organization. We are also confident that we have built a flexible, future-oriented system that can quickly adapt to and handle changes and expansion of our business in the future. This success in improving our loan-processing procedures has resulted internally in maximizing business competitiveness by enabling the sales force to focus on their primary duties rather than on the technical and administrative problems of loan processing, and externally in maximizing customer satisfaction by considerably improving process cycle time.

Government of Andhra Pradesh, India—Silver Award

SmartGov is an integrated product developed for and deployed at Secretariat, Government of Andhra Pradesh, India by TATA Consultancy Services. The Secretariat is the apex administrative body of the State Government with primary responsibility to formulate policies, procedures, rules and guidelines that will govern the implementation of various schemes and projects by the implementation authorities of the government outside the secretariat. The predominant work done at the secretariat is workflow intensive, with immense flow of information in the form of "files" from one officer to another in this process, for seeking opinions, approvals and comments. Some of this work requires the creation and maintenance of databases that hold data critical to the decision making process. SmartGov answers all the problems faced by Secretariat, through its immense high-

quality features. SmartGov automates the functions of the executive Government agencies at all administrative levels.

PAN EUROPEAN

Credit Suisse Financial Services, Switzerland—Gold Award

Credit Suisse, one of two business units of Credit Suisse Group, has become a global leader in private banking. In 2001, Credit Suisse's pre-tax margins were 51 percent and net profit per employee was \$175,500. While in a typical year it generates just 20 percent of total annual Group revenues, historically it has provided close to 40 percent of the profits. However, high margins invite competition, and Credit Suisse knew that other financial institutions were ready to accept the invitation. The company engaged System Integration Center AG to create *ServiceNet*. It is only due to *ServiceNet* that Credit Suisse is able to set the standard of service for its industry, grow its volumes and expand its client base without either eroding its margins or cutting back on service. It will be very difficult indeed for most of its competitors to achieve these same results.

Groupama, France—Finalist

Groupama traces its origins to 1840 and has grown from its roots in the French agricultural community to become one of the world's leading mutual property and casualty insurers as well as one of Europe's largest financial services groups. Groupama Centre Sud refocused IT around business issues and has built a new strategic orientation: quality to serve performance. The client is the focus for the New Market Model which means to approach clients efficiently (at the right time) and effectively (through the right channels) at each stage of the business process.

MATÁV, Hungary—Silver Award

The Hungarian Telecommunications Company (MATÁV) is the dominant player in the Hungarian market, providing full range of telecommunication services throughout the country. As a preparation for the market deregulation, and also to support internal organization changes, workflow and workforce management were identified as a chance for significantly improving corporate performance and customer satisfaction. The project went through the entire application life cycle from requirement analysis and system design to development, integration, training, etc. Within eight months from the beginning, one of the three system centers was operational, while the complete deployment took 13 months overall.

LOGiCOM, United Kingdom—Finalist

LOGiCOM has developed a Business Process and Workflow Model, which is absolutely fundamental to the sales, marketing and operational functioning of the company. Each prospective customer's business processes and workflows can be simulated to help the prospect visualize how a LOGiCOM solution could integrate with its business and meet their parts management needs. LOGiCOM maintains unique, discrete business process/workflow models of its own business and for that of each of its customers. The company has identified significant qualitative and quantitative benefits that

have been realized through the creation and maintenance of these process/workflow models.

ACKNOWLEDGEMENTS

As always, I am indebted to Connie Moore, Vice President, Giga Information Group and leading Awards judge, who has been a guiding light and champion of the *Global Excellence in Workflow Awards* for many years. Her insights, hard work and writings have been greatly instrumental in their global success and recognition. My grateful thanks go to the whole judging panel, who each spend many hours reading and analyzing the entries.

My appreciation goes also to *all* the corporations involved in submitting their case studies for consideration. Without them, we would have no Awards to bestow. An enormous amount of effort goes into documenting a workflow implementation and reengineering effort with the view to presenting it according to our guidelines. Vendors and integrators collaborate closely with their customers, and together they walk a fine line between providing too much information or too little.

The companies that did not win major Awards deserve special acknowledgement, because their efforts in submitting entries were no less than those of the winners. To be selected as a Finalist from the many entries we receive is an honor in itself.

We encourage those who were not published this year to resubmit their case studies for the next annual Global Excellence Awards and we look forward to profiling their case studies in the next volume of *Excellence in Practice*.

Information on the Awards can be found at www.waria.com.



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