

Intelligent Process Automation: Transform the Customer Experience by Tackling the Dreaded Handoff Syndrome

By: Connie Moore

The Essentials

Business process improvement professionals, application developers, and content management practitioners often ask where to start with business process transformation and continuous improvement. Should they go big by tackling a strategic, cross-functional project? Or, should they focus on a smaller departmental effort and use that project as a springboard for a larger initiative? There's no right or wrong answer, except that when prioritizing initiatives, it's vitally important in today's customer-centric world to greenlight projects that transform or significantly improve the customer experience.

Most importantly, keep in mind that customer experience cuts across the entire organization – not just sales and marketing. Focusing exclusively on channels and the front office can lead project teams to overlook serious back-office inefficiencies that also impact customers. As a result, look for opportunities to deliver a radically better customer experience while also increasing productivity, reducing costs, and delivering a high ROI.

Case Study: Business Process Damaged by Poor Handoffs and No Accountability

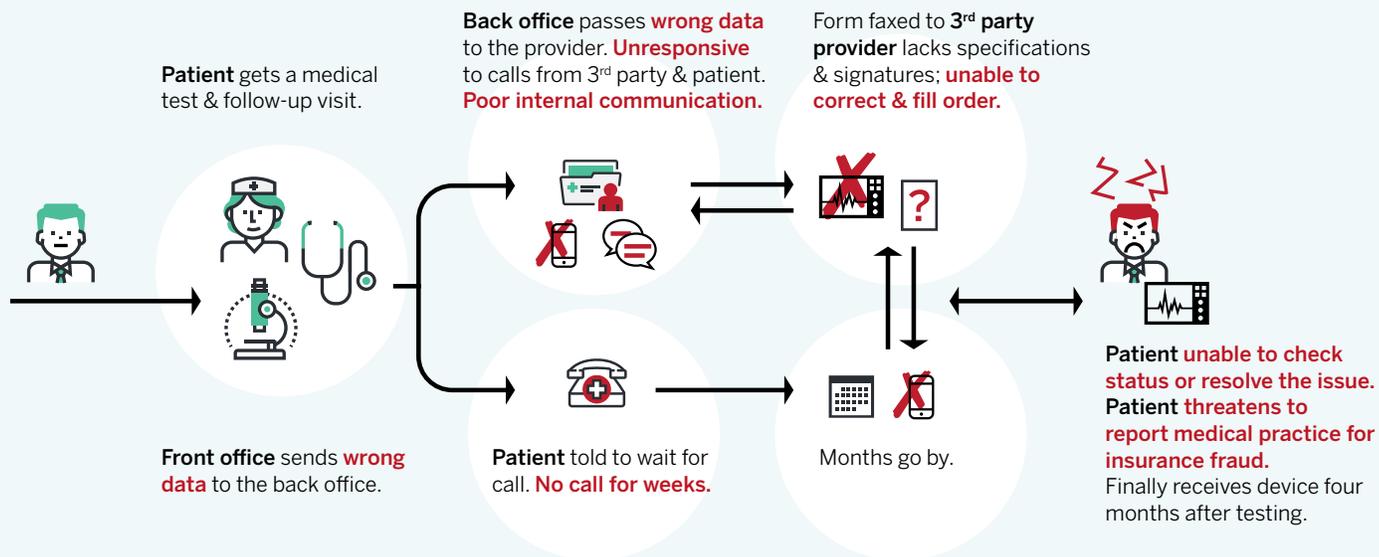
Figure 1 illustrates a real-life example of how manual, untracked, and unaccountable handoffs can wreck a business' reputation and drive customers away. Unfortunately, this kind of dysfunctional process occurs all too often in today's businesses.

This example is drawn from a medical firm but similar problems exist in other industry sectors including banks, insurance companies, pharmaceuticals, manufacturers, and government agencies. In this example, many missed steps occurred during the patient's sixteen-week ordeal, creating frustrating delays for the patient and a bad reputation for the medical company:

→ Last October, a physician ordered a medical device to treat a patient based on test results. The patient experience during the test was excellent. The physician's front office handed off the order to the back office as usual. The first error occurred at

Figure 1

How to create a miserable customer experience and ruin your reputation



this point: the physician didn't specify the device settings and the back office didn't catch the omission.

- The back office faxed the order to a third-party provider so it could deliver a device to the patient's home.¹
- The provider couldn't fill the order because of the missing data. The provider's staff contacted the physician's back office multiple times but received no response. No one at either firm called the patient. (Two more errors.)
- When the device didn't arrive, the patient called the physician's office and was told the entire testing process would have to be redone. (Another error.) The patient knew this was wrong and that the insurance company would not pay for a repeated test. After a lot of digging, the patient called the third-party provider for help.
- The patient continued calling the physician's office, only to hear the staff

blame the third party for the unfilled order.

Finally, someone at the physician's office looked at the actual order and saw it was missing critical data. After two months of frustrating calls, the physician's office finally sent a new fax with correct device specifications. However, the doctor had not signed it, so the order still could not be filled. (Another error.)

- The patient learned of the new problem and called the physician's office repeatedly. The back office denied that the second (updated) faxed form was incorrect, leaving the patient and the third-party provider without any recourse. (Another error.) Another two months went by.
- In February the patient called the medical firm's practice manager and threatened to contact the insurance company to report fraud (because the insurance company paid for the medical evaluation, but the device was never delivered). Finally, the back-office staff got the physician's signature and sent

a third fax to the third-party provider, which immediately filled the order.

This sad-but-true tale is fraught with manual processes, poor tracking of telephone calls and faxes, numerous handoffs inside and outside the organization, missing data, and extremely poor customer service. It cries out for process improvement, intelligent process automation, better information management, and greater accountability. As with many other broken processes, the customer experience was great in the beginning, only to be torpedoed by the back office and poor inter-company interactions. This demonstrates the huge need for a “customer first” mindset. For transformation, the medical firm should launch an organizational change management initiative alongside deploying better automation, such as intelligent process automation (BPM software), robotic process automation, forms validation, and fax automation.



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First, Automate Processes Involving Multiple Handoffs and Poor Execution

Key indicators to watch for when selecting high-priority projects for process and information automation include:

- **Paper-intensive work.** Despite the automation already deployed within organizations, it's shocking how many businesses still rely on paper inputs and unmanaged digital documents to fuel their processes. Typically, these paper- and document-intensive efforts lead to poor customer interactions and high costs. Even if business documents are already digital, the results can be similarly bad if automation is not used to manage and transfer information.
- **Long-running engagements that involve managing, tracking, and coordinating complex cases.** These processes start by assigning a case to an employee who manages all the customer interactions and coordinates with external parties until the entire engagement is over. For example, an insurance company employee would track a patient's disability claim over several months or years: communicating with the policy holder, obtaining clinical notes from doctors, and tracking medical test results, tax records, and payroll information. This work is often only semi-automated, so information and interactions get lost frequently.
- **Lots of handoffs between workers, departments, or external organizations.** These processes, which could also be long-running engagements, involve moving work between individuals within the same workgroup, transferring work to another department or line of business within the

enterprise, and/or sending requests and updates to business partners outside the firm. Such handoffs are often poorly automated with limited integration between systems. This untracked work frequently falls between the cracks. Often, the business is unaware of its inefficiencies and poor customer service because a “business-as-usual” mindset renders the problems invisible.

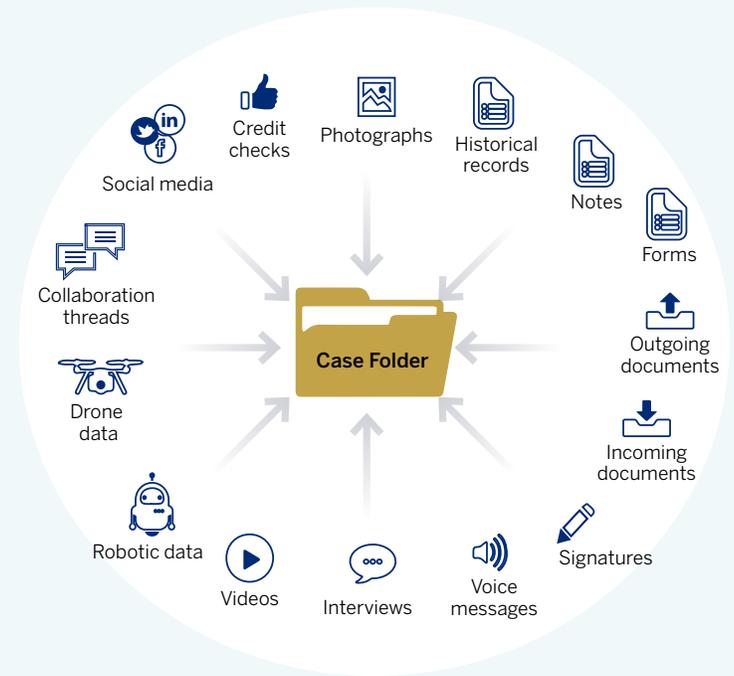
Tackle Broken Processes with Intelligent Process Automation, Case Management, and Robotic Process Automation

Several somewhat overlapping intelligent process automation solutions (also known as BPM software) are available to choose from when automating processes with a large number of handoffs. These include 1) traditional business process automation, 2) case management,² 3) robotic process automation (RPA), and 4) content management. (Figure 2 depicts the differences between traditional BPM software and case management.) Think of these four software categories as follows:

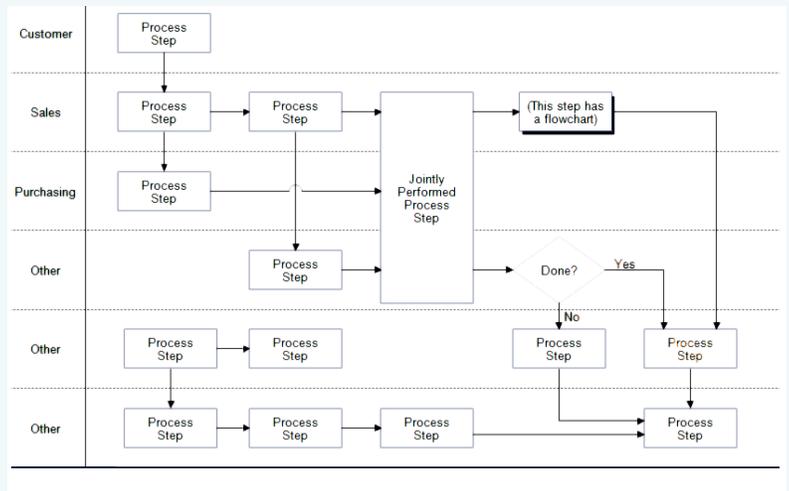
→ **Traditional process automation software (i.e., BPM software)** focuses on moving work between individuals while also integrating process flows with application software and information repositories. The emphasis is on designing, executing,

Figure 2
A tale of two automated business processes

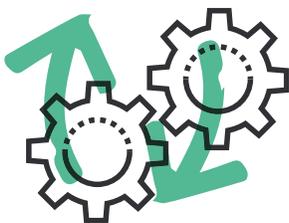
Case management focuses on information and coordination



Traditional BPM focuses on process and flow
Cross-Functional Process Map



Source: RFFlow



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managing, and continuously improving the flow of work.

- **Case management software** also automates business processes. However, the work often remains with one individual and the process is designed to create, track, and manage a case folder that may take a long time to close. Because case management often involves documents, e-forms, digital images, faxes, and other unstructured information there is also a core, crucial role for information management software to control and manage unstructured content.
- **Robotic process automation** is a relative newcomer to the digital process automation scene. The need for RPA arises when there are repetitive, manual tasks that were never automated by business software, content management, traditional BPM software, or case management. In many ways, RPA takes the drudgery and inefficiencies out of business processes by automating keystrokes that perform mundane tasks such as copying information from spreadsheets and entering data into business software, or scanning incoming emails for further processing. RPA can be implemented alone or integrated with digital process automation or case management.
- **Content management software** provides the infrastructure and capability to create, modify, collaborate, deliver, manage, and control unstructured information in many forms, including but not limited to web content, business documents, e-forms, digital images, rich media, collaboration artifacts, and analytics data. This software helps organizations manage the many types of information that fuel the execution of processes within the organization.

Call to Action

One sure-fire way to choose and prioritize among business processes needing automation is to target long-running processes (spanning weeks, months, or years) that involve many handoffs between individuals, workgroups, departments, lines of business, and external business partners. Wherever there's a manual or semi-automated handoff, you'll find a big problem with lost work, poor accountability, nonexistent or poor tracking, non-compliance, and horrible communication with customers. A business process with lots of handoffs is often a poster child for the worst problems with customer service and inefficiency.

Whenever an organization is faced with paper-intensive procedures, multiple handoffs between workers or workgroups, long-running processes, and highly clerical tasks that have defied automation, it is a good idea to 1) prioritize those processes for improvement or transformation and 2) look at case management, standard digital process automation, RPA, and content management as likely solutions.

Endnotes

1 Although some readers may see fax as an antiquated, no-longer-used technology, fax is quite prevalent in the U.S. medical field and other sectors.

2 The term adaptive case management is also used by The Workflow Management Coalition (WfMC), the standards body for workflow and process technology, whose website is <http://www.wfmc.org>. The WfMC defines adaptive case management as "information technology that exposes structured and unstructured business information (business data and content) and allows structured (business) and unstructured (social) organizations to execute work (routine and emergent processes) in a secure but transparent manner." (See <http://adaptivecasemanagement.org/AboutACM.html>.) For more on adaptive case management, see the book "Taming the Unpredictable: Real World Adaptive Case Management: Case Studies and Practical Guidance," Keith D. Swenson et. al., published in 2011 by Future Strategies, Inc.

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Contact us:

info@deep-analysis.net

+1 978 877 7915

