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PROCESS INSIGHTS & CASE STUDIES

PREPARED BY
EDWIN GOON
Director Business Process Automation



CASE STUDY 1:

**PROCESS AUTOMATION AND SALESFORCE
OPTIMISATION**

**DESIGN, BUILD AND IMPLEMENTATION OF A
CAR CONFIGURATOR**

The client situation

Our client is present in thirty three global markets and operates as a key strategic partner to the world's foremost premium and luxury car brands providing an effective, well-financed and customer centred route to market for vehicles and parts. They operate across every link of the post-factory automotive value chain for original equipment manufacturer partners, providing a highly efficient customer-focused route to market that delivers shared rewards at every stage.

With digital disruption affecting every industry across the globe our client had to act to ensure their shift to a digital era and accelerate its plans to build and automate the purchase of a car online.

The challenge

Our client had purchased Salesforce and considered the investment as a game changer in terms of their ecommerce solution. The Salesforce platform purchase had been endorsed by the board and executive with the objective of leveraging the platform capability to sell cars online.

A decision had been made to create an online car sales configurator and a transformational project was funded called X15 to propel the business online. Australia was to be the first domain to be transformed. Alchemy Solutions ("Alchemy") was then engaged to help with the process engineering, journey mapping and automation design and implementation.

Resources allocated to the initiative were located in the UK, Romania and Australia. The team locations meant that time zones would need to be worked through to ensure a positive meeting cadence could be implemented.



The solution

Building on the Salesforce platform and automating a number of key processes, Alchemy designed and engineered the new car configurator. This process was reliant on Alchemy's proprietary employee and customer journey mapping methodologies to ensure accurate digitisation and automation of relevant journeys.

Alchemy took the lead on suggesting methods that could deliver quick wins for the client to expedite delivery. We designed and provided a comprehensive solution delivery plan for our client to work with us successfully.

Alchemy's expert process mapping and engineering capability:

- Utilised our lean and six sigma process development toolkits and SIPOC analysis to create a standard for process development
- Mapped all "to be" customer journeys and mapped processes to form the design of the build of the car configurator
- Engaged global stakeholders and increased collaboration, ownership and involvement of all stakeholder groups in the delivery of the projects
- Aligned global sub solution integrators, customer and internal business and information technology delivery resources to a single method of process improvement and delivery which could easily be communicated
- Based on the "to be" journeys created a cadence for the project that allowed for the appropriate levels of engagement in rituals and also working time to achieve results

An Alchemy agile delivery squad to lead, oversee and coordinate all delivery of the global project:

- Squad included the following roles; agile portfolio lead, product owner, process analysts and a UX designers
- Agile portfolio lead and product owner operated at the executive level of business and customers to ensure buy in and support
- Squad roles and responsibilities included the coaching and mentoring of all global solution integrators, customers and internal business and information technology delivery resources

The urgency of delivery required a priority to be placed on the unification of all delivery resources across multiple global locations and groups of stakeholders. The aim was to create a high performing team where people could work hard on focussed and clear tasks, enjoy spending time together and feel part of a bigger purpose.

The results

Alchemy successfully designed and delivered the new car configurator by utilising its lean and six sigma process toolkits to build out the "to be" journey and process maps to automate the online purchase of a car.

Alchemy's hybrid agile method Ei5™ ensured common language, approach and understanding for the global team and stakeholders.

The executive team were delighted with the delivery approach and in particular the customer and employee journeys and process maps. These key deliverables not only were utilised for the automation of processes, but marketing and dealerships also utilised the processes for key campaigns, coaching and training.

To that end our client was impressed with the outcomes and praised the professionalism of the Alchemy team for enabling and managing delivery of this crucial global project.

Today, the car configurator has enabled significant online sales growth, during a period where purchasers were physically limited from accessing the traditional car showrooms.

It has provided customers with the ability, online, to choose their model and any options and accessories wanted, place a fully refundable minimum deposit of \$1,000 and then wait for a dealer to contact them to arrange delivery either at home or at their nearest dealership.

Final thoughts

The Alchemy team have delivered a world class automated car configurator enabling shoppers to purchase a car online, and the Alchemy team now oversees the roll out of the new technology to the Latin America and Asian markets.

Alchemy's successful leadership of the global team involved establishing a clear delivery plan and approach supported by the following Alchemy tools and techniques

- **Alchemy's Continuous Improvement model** - is designed to create a purpose fit effective plan to minimise the risk and disruption to people, current process and technology in order to create a climate for change, engage and enable stakeholders and implement and sustain new behaviours.
- **Alchemy's Customer and Employee Journey Mapping Ei5™ method** - designed to be engaging and clear for all stakeholders and identifies business ownership as critical to delivery success. The use of lean, six sigma, agile techniques, tools and rituals ensure that everyone understood their role and that conflicts were resolved quickly.
- **Partnering Framework** - Alchemy's partnering framework ensures a clear pathway for everyone involved to experience success. Alchemy's people and culture transfer knowledge and provide a collaborative environment and tools for all parties to engage in a safe, visible and positive way.

Alchemy's key sponsor wrote "The Alchemy team have demonstrated digital leadership and know-how team to deliver the Australian car configurator. The automation of our process through the techniques Alchemy brought to the table have provided us with a powerful set of delivery tools and a configurator that we will roll out globally for our customers. Alchemy will lead the next roll outs to Latin America and Asia and we feel in safe and reliable hands for these implementations'.

CASE STUDY 2:

PROCESS AUTOMATION, CHANGE OF TENANCY

**DESIGN, BUILD AND IMPLEMENTATION OF
DIGITISED PROCESSES TO STREAMLINE
AUTOMATION**

The client situation

City West Water ("CWW") is one of the three metropolitan Melbourne water businesses owned by the Victorian Government. They provide drinking water, sewerage, trade waste and recycled water services to customers.

Annually, CWW supply c93 billion Litres of drinking water to customers and transfer approximately 94 per cent of the sewage and trade waste collected to Melbourne Water's Western Treatment Plant in Werribee. The remaining six per cent is treated at their Altona Treatment Plant.

In addition to their core business, CWW have many programs and policies in place like their Community and Social Involvement Strategy, Environmental Sustainability Plan, Cleaner Production Strategy and residential water conservation activities, to help them achieve their vision to be a truly sustainable water business.

The challenge

Requests to connect and disconnect water services to facilitate the movement of a tenant into and out of a property involved a large number of manually intensive, laborious tasks for not only CWW but also for real estate agents, aggregators and landlords. Hand written forms and unstructured emails were the 'process' and the respective submissions would be manually tendered into the existing CRM. This resulted in not only data quality issues, but also a growing backlog work, which ultimately led to a knock-on effect of billing errors, missed revenue and compliance breaches.

CWW's approach to tackling this issue, in line with a major program of work to digitise high volume and high value customer interactions, was to run a proof of concept to validate the capability of an automation and robotics platform. However an inexperienced delivery team, absence of foundational analysis, and an offshore vendor resulted in costly delivery problems and progress stalled. Alchemy was engaged to fill the capability gap and steer the initiative back on path towards its key objectives.



The solution

Initial observations revealed all parties involved in delivery had individual communications styles and cadences, with a lack of a common language to approach such a large and complex initiative that touched multiple divisions within CWW.

We started by hosting a series of process-based workshops to focus on two key elements: process automation and a web-based form to capture and standardised input with a view to form a common lexicon between the business stakeholders and the platform delivery team.

The starting point was to investigate the “as-is” which was difficult due to an absence of quality data capture points and autonomous data analysis hence we leveraged our data maturity knowledge to combat this unavoidable challenge.

We completed further analysis and ensured development of clear, accurate and reliable task process definitions. The definitions included Level 3 (roles, inputs, outputs and steps required to complete a specific task) processes, detailed SIPOC analysis for Level 4 instructions and procedures. This allowed the vendor to develop their code on the back of the L4 process (i.e. Level 5 work instructions).

In summary the business stakeholders were defining their requirements at L3 and the vendor needed requirements at L4 to make the required development changes to the platform. The establishment of this common lexicon broke the back of the delivery issues and ensured every stakeholder was on the same page.

During this phase of the project it was discovered that there was no provision within the project scope for testing, and the delivery team lacked capability to undertake change management activities. The defined processes were able to inform the testing scope and change impact assessment; which in turn fed into the key communications to the end consumers.

The results

Within a 10 week timeframe we achieved the following key outcomes:

- Redirection of 5.0 FTE capacity and capability of the current (15-20 FTE) data entry team to focus on exceptions management
- Significant increase in data quality (material improvement)
- A positive effect of resolving indirect business process issues
- Process triggers and rules revised, re-aligned and optimised to ensure automation of accurate processes
- Customer experience improved via significant improvements to the precision of communications e.g. welcome emails, general notifications, being sent the right bill

Final thoughts

To address the delivery issues, Alchemy took on the Process Improvement and Automation leadership role.

By utilising a combination of our proven methods and our ability to educate the team members and engage stakeholders we were able to save the Automation project from failure.

Alchemy's process lead and team were able to engage all stakeholders and ensure a common language and approach were utilised. Our success in this engagement was notably made possible by contributions and inputs from our following tools and techniques:

- **Alchemy's Continuous Improvement model** - is designed to create a purpose fit effective plan to minimise the risk and disruption to people, current process and technology in order to create a climate for change, engage and enable stakeholders and implement and sustain new behaviours.
- **Alchemy's Customer and Employee Journey Mapping Ei5™ method** - designed to be engaging and clear for all stakeholders and identifies business ownership as critical to delivery success. The use of lean, six sigma, agile techniques, tools and rituals ensure that everyone understood their role and that conflicts were resolved quickly.
- **People First** - Alchemy brings a distinct and holistic people, process and technology approach to each engagement which helps in identifying and remediating blockages to communication and process flows. The identification and prioritisation of customer and employee journey's ensures line of sight to what's important - people!

Alchemy's key sponsor wrote:

"It was a pleasure to work with such a talented and focused group of people who partnered with us and ensured we had everything in place for successful delivery. The expertise shown by Alchemy along with their engagement style meant that we were able to adopt new practices for our immediate and future benefit.."

ENGAGE TODAY

LUKE STOW

Director

M: 0406 593 024

luke.stow@alchemysolutions.com.au

