Igniting Improvement and Supuring Transformation
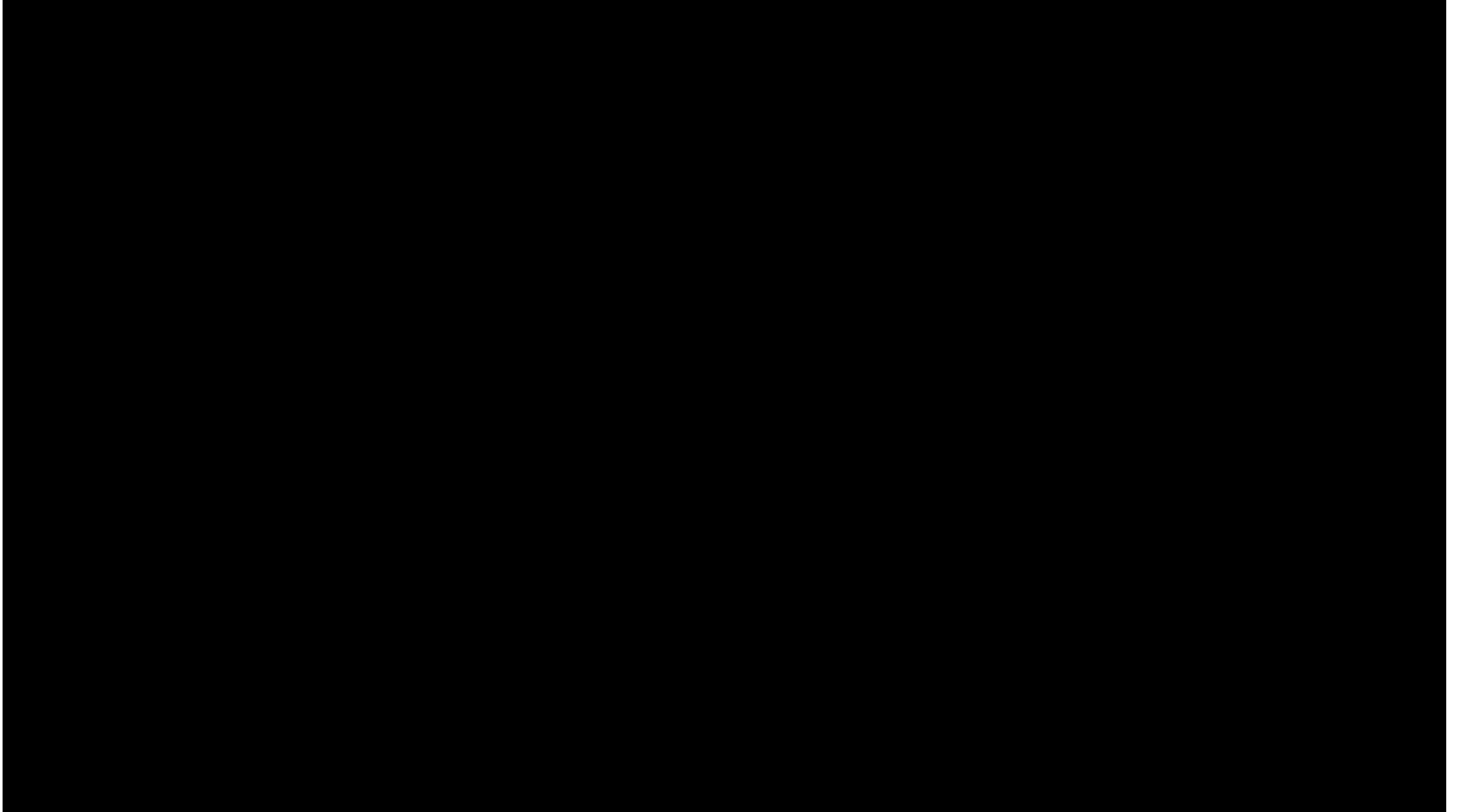
A LATAM Success Story

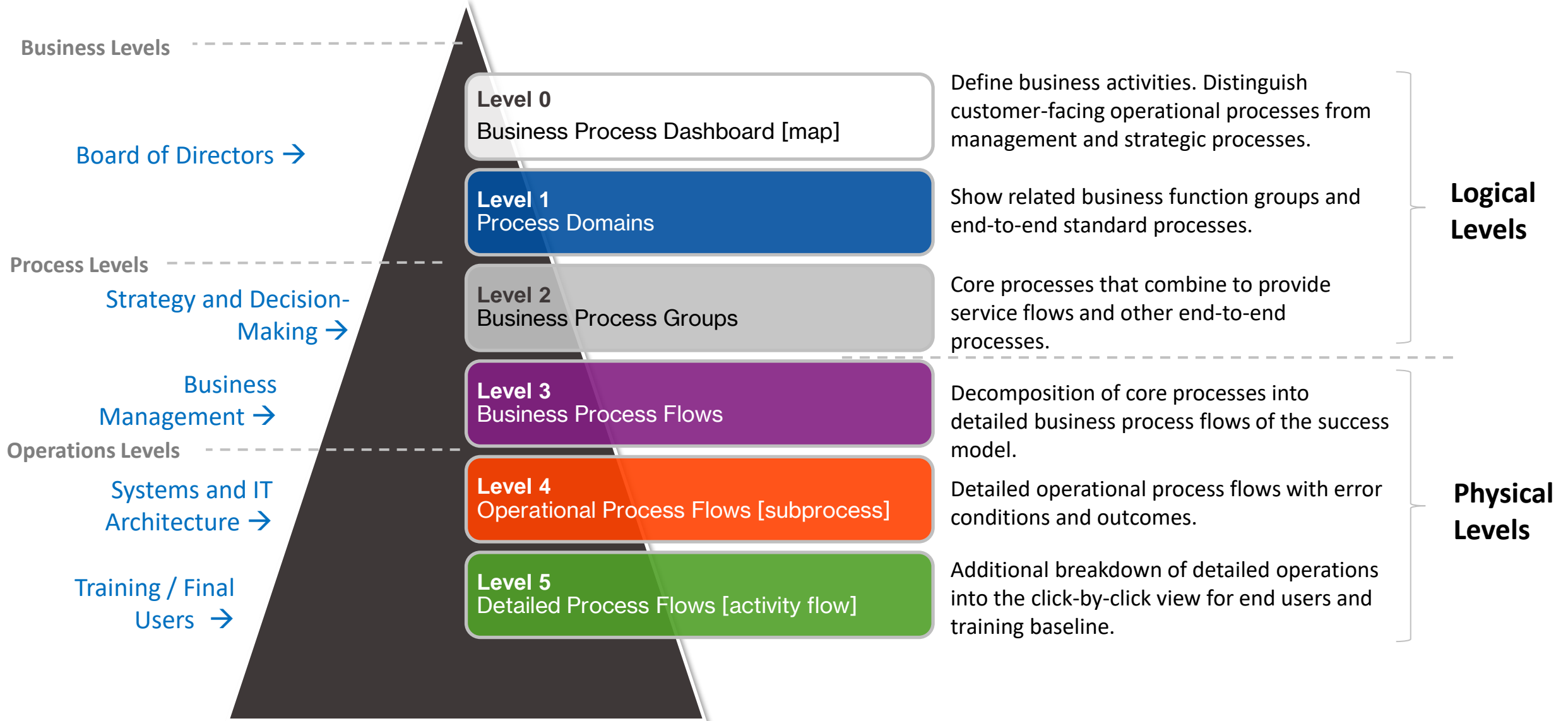21st BOC Strategic Partner Meeting

Sept. 12th & 13th, 2024

Exploring Impact

Learning Together!

Hands-On

The Change

Connecting the Dots!

Lesson Learned

To inspire action, a message must resonate with the audience's values and concerns, bridging the gap between strategic goals and individual motivations.

This statement underscores the importance of making strategic communications relevant and engaging by connecting them to the audience's core values and concerns. It's about creating a narrative that not only informs but also motivates, aligning individual and organizational goals to drive meaningful action and success

Step #1: Exploring Impact – Who and Why?

Purpose of Information

Business Levels

Board of Directors →

Process Levels

Strategy and Decision-Making →

Business Management →

Operations Levels

Systems and IT Architecture →

Training / Final Users →

Level 0
Business Process Dashboard [map]

Define business activities. Distinguish customer-facing operational processes from management and strategic processes.

Level 1
Process Domains

Show related business function groups and end-to-end standard processes.

Level 2
Business Process Groups

Core processes that combine to provide service flows and other end-to-end processes.

Level 3
Business Process Flows

Decomposition of core processes into detailed business process flows of the success model.

Level 4
Operational Process Flows [subprocess]

Detailed operational process flows with error conditions and outcomes.

Level 5
Detailed Process Flows [activity flow]

Additional breakdown of detailed operations into the click-by-click view for end users and training baseline.

Logical Levels

Physical Levels

Step #1: Exploring Impact – What's in It for Me?

Over 70% of process standardization opportunities are due to one or more of the following causes.

Undefined Processes

Processes Without a Business Owner

Processes Not Understood

Processes Not Followed

Without End-to-End Communication with Key Stakeholders

Without Performance Measurement

Cumbersome to Execute

With Waste

Not Aligned with the Strategy

Business Impact

25% Drop in CX

75%

50%

Month 1   Month 12

18% Increase in Problem Resolution

12%

30%

Month 1   Month 12

2 Hrs. Increase in AHT for Top Reasons

03:00

05:00

Month 1   Month 12

5% Increase in Repeated Customer Contacts

10%

15%

Month 1   Month 12

People Impact

- **Increased workload and stress due to unclear responsibilities, disrupting work-life balance.**

- **Higher stress from unresolved issues and poor communication.**

- **Longer wait times for requests, reducing employee satisfaction.**
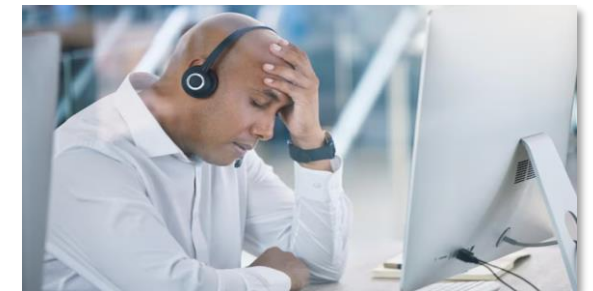
How many Tools were there to see real picture?

30 Countries +12,000 Employees

BlueworksLive

miro · Lucidchart · bizagi · V · ADONIS Your professional BPM Suite · P · ARIS Platform · W

Internal Impact Across Teams

- Lack of real-time collaboration
- Extensive manual work and maintenance
- No single repository for models
- No standard process attributes
- PDF is the main form of consultation and publication
- Email as the primary means of approval

Variability

2

Some regions had process descriptions only two pages long, with some having just three lines of detail.

10-15

Other regions had process descriptions from 10 to 15 pages long.

60-80

Others had process descriptions this long.

Lesson Learned

Business transformation starts with empowering workforce as the drivers of change. Through continuous learning and process improvement, teams become the catalyst for operational excellence, turning strategy into lasting success.

Business transformation is driven by people, not just technology or innovation.

It begins by equipping workforce with critical thinking skills, fostering continuous learning, and embracing new work methods. When empowered, people become the key drivers of change, leading to operational excellence through their commitment to process improvement. Transformation is a collaborative effort, where every employee contributes to creating a culture of innovation and lasting success.

For Business Process Lead, Coaches and Mentors

Definition of objectives, roles, contact persons, guidelines, process architecture

THROUGH TM FORUM FRAME WORKS

Improvement suggestions, maturity level assessment, quantitative control with KPIs

THROUGH CMMI & BLANCED SCORECARD

Collection and maintenance of process documentation (processes as they are) through process landscape modeling and process flow diagrams

THROUGH 6W2H METHOD

Communication and execution of processes, integration with other systems

THROUGH ADKAR & KOTTER'S 8

Analysis of as-is processes, qualitative and quantitative optimization (simulation), development of to-be processes

THROUGH SIX SIGMA

Release workflows for process publication, definition of validity, organizational and technical implementation, training, and workflows

THROUGH PMI PMBOK & SCRUM

Diagram labels:
STRATEGY & CONCEPTION
DESIGN & DOCUMENTATION
ANALYSIS & OPTIMIZATION
IMPLEMENTATION & CHANGE
EXECUTION & OPERATION
FEEDBACK & CONTROLLING

Control Objectives
Performance Indicators
Initiatives
Further Assets
Products & Services
Controls
Business Objects & Data
Risks
Organization & Partners
IT Applications & Infrastructure
Documents
Roles & Performers

VALUE CHAIN
SEQUENCE
STRATEGIC • TACTICAL • OPERATIONAL
RESOURCES

For those Running Process Documentation Efforts
Subject Matter Experts [SMEs], Business Process Analyst, others
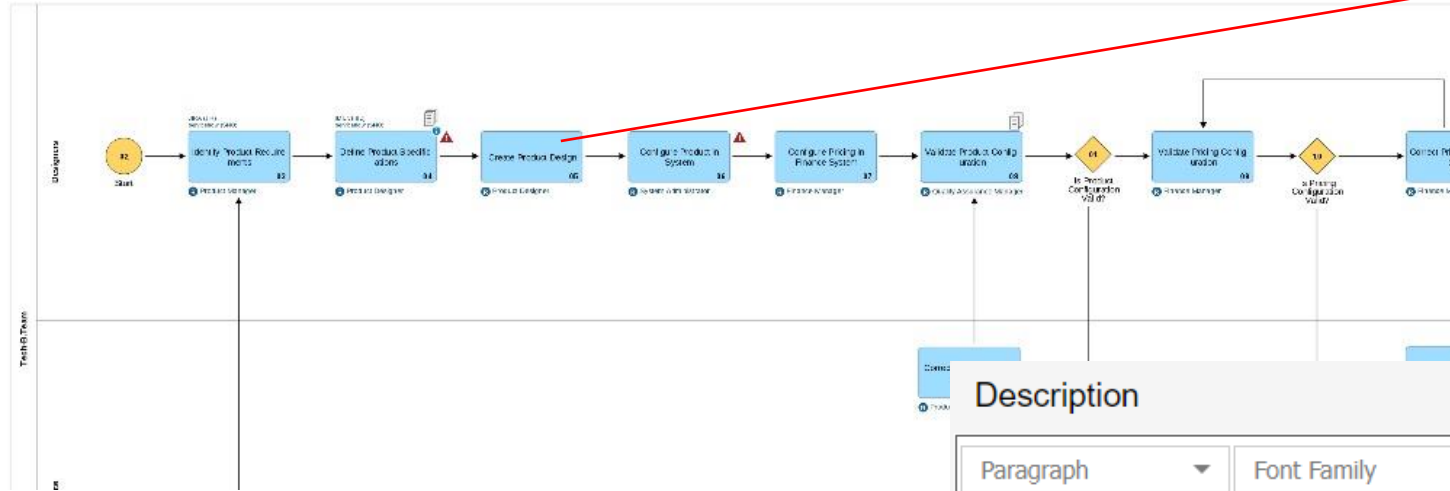
Job Aid #1

CSG

Create a Service Order (TC)

14
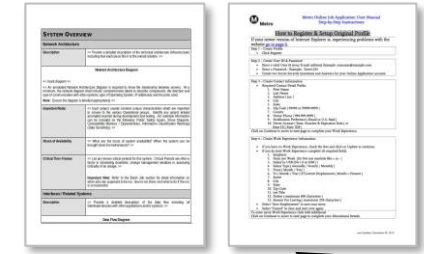
(R) L1 Specialist

Description

Paragraph | Font Family | A A A ▾ B I U S

When remote troubleshooting fails and a technician is required, the L1 Specialist or authorized personnel takes customer details, issue code, job comments, and preferred dates.

To request a technician visit when remote solutions aren't enough.

Customer info, issue details, dates, and additional comments.

Created in CSG by filling and submitting required fields.

At the end the work order information will appear. Please review the job aid *"Crear una orden de servicio (TC) para problemas de Internet"*.

Comments will be place in the customer care log describing some of the activities carried out without being able to solve.

Job Aid #2

6W2H Method
Information Details

When to create a Service Order?
Who the Service Order?
What & Where is needed from the service order?
Why is the service order needed?
Which data is needed to create the service order?
How is the service order created?
How Much? Not Applicable to this step

Lesson Learned

Maintaining engagement through close communication, workshops, and hands-on training is essential for driving process improvement and operational excellence. When people feel connected, supported, and continuously developed, they become active contributors to sustained progress and innovation within the organization.

Close communication, workshops, and hands-on training are crucial for keeping people engaged and driving both process improvement and operational excellence. When people feel supported and connected, they become active contributors to ongoing progress and innovation within the organization.

Step #3: Hands-On

We need to bring learning to people, not people to learning.

Elliott Masie

Scalability & Growth

Data-Driven Decission Making

Problem-Solving

Over-Coming Barriers

Innovation

Film-Based Business Inshight Analysis
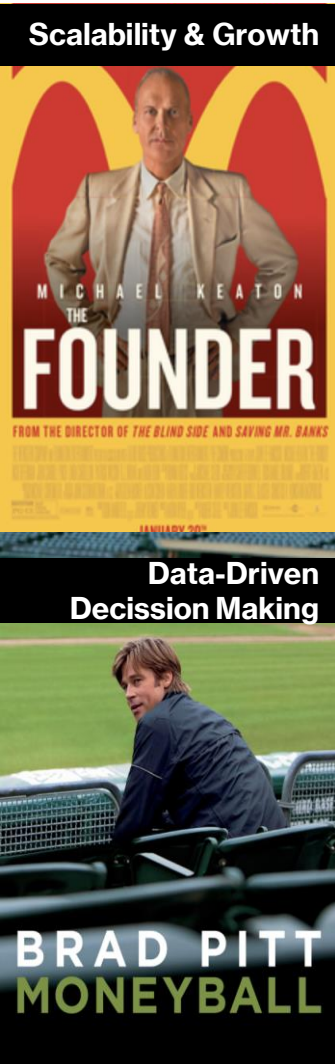
Conducting a film-based business insights workshops. Asking the right questions helps participants engage deeply with the material and extract valuable lessons. See some examples:

1. **What key themes or elements from the film can be applied to our current business challenges or goals?**

This question encourages participants to draw direct connections between the film's narrative, characters, and themes, and their own business context. It helps in identifying actionable insights and strategies that can be implemented in their organization.

2. How did the characters' decisions and actions influence the outcomes in the film, and what can we learn from these decisions to improve our own decision-making processes?

By analyzing character behavior and decision-making in the film, participants can reflect on their own decision-making practices and identify areas for improvement or new strategies that might be beneficial.

3. What processes or strategies depicted in the film could be adapted or improved upon in our own business operations to enhance efficiency or effectiveness?

This question aims to translate specific processes or strategies seen in the film into practical suggestions for the participants' business operations. It encourages critical thinking about how cinematic examples can inspire or inform operational improvements.

But not easy! Change Management is always needed to reinforce this new and easy way of working.
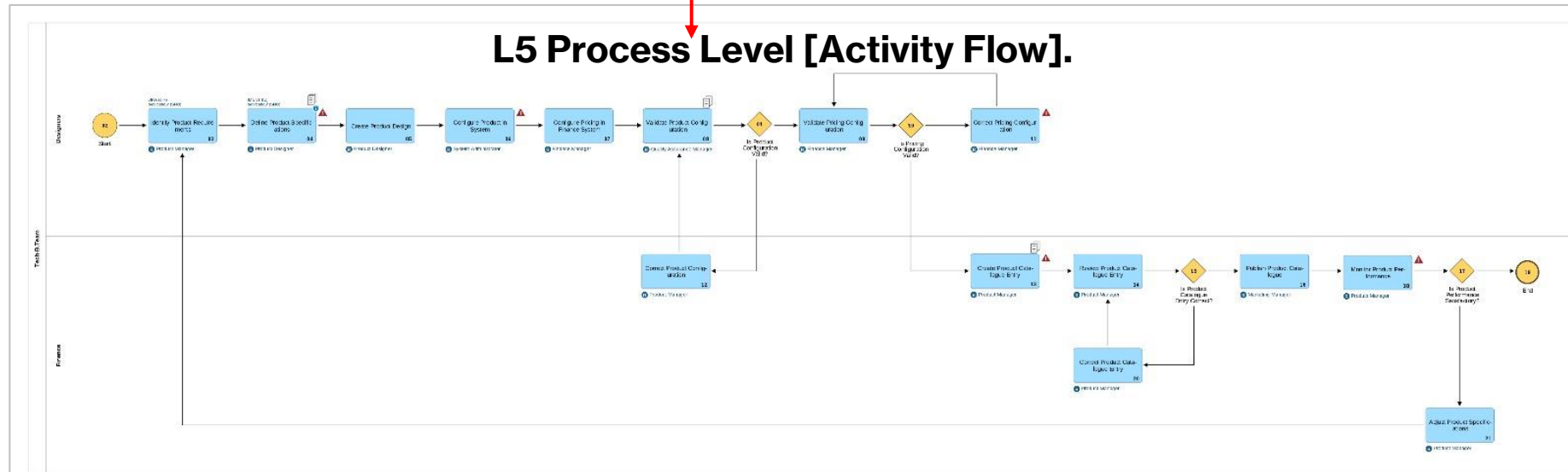
MS Teams
- Change Request Channel
- WiKi Channel for New Things
- Users Round Tables for BIZ Needs
- Methodology Workshops
- Adonis integration Tips and Tricks
- Success Stories Spot Light

L4 Process Level.
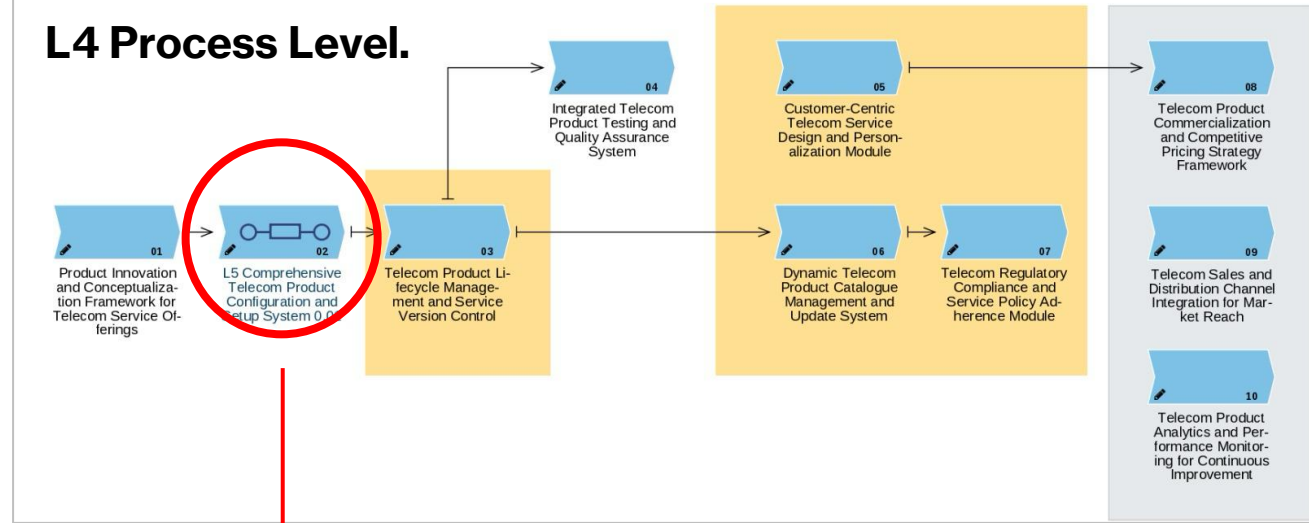
L5 Process Level [Activity Flow].

Step #3: Hands-On

As people engagement and empowerment continued, more and more people (business areas), such as IT Compliance and Data Governance, joined the efforts for risk analysis and mitigation.

L5 Process Level [Activity Flow].

NEW **Risk Catalogue**

Design & Document ∨ | + New | Q Find

Models | Objects | Quick Access

> 📁 Process
∨ 📂 Risk

⚠ 07.04.01 - Inaccurate Product Configuration
⚠ 07.04.02 - Delayed Product Launches
⚠ 07.04.03 - Regulatory Non-Compliance
⚠ 07.04.04 - Outdated Product Catalogue
⚠ 07.04.05 - Insufficient Product Testing
⚠ 07.04.06 - Poor Version Control
⚠ 07.04.07 - Unauthorized Data Access
⚠ 07.04.08 - Product Mispricing
⚠ 07.04.09 - Billing System Integration Failure
⚠ 07.04.10 - Inconsistent Product Information
⚠ 07.04.11 - Missed Market Trends
⚠ 07.04.12 - Third-Party Vendor Delays
⚠ 07.04.13 - Lack of System Scalability
⚠ 07.04.14 - Sales-Technical Miscommunication
⚠ 07.04.15 - Cybersecurity Risks
⚠ 07.04.16 - Poor Product Performance Visibility
⚠ 07.04.17 - Data Synchronization Issues
⚠ 07.04.18 - Insufficient Staff Training
⚠ 07.04.19 - Overcomplex Product Offerings
⚠ 07.04.20 - Multi-Channel Incompatibility

Step #3: Hands-On

Risk Catalogue

Risk & Control Matrix for Product Configuration Process [Activity Flow]. Example

Lesson Learned

Empowering the workforce to actively participate in transformation initiatives not only accelerates change but also drives savings, enhances customer experience, and boosts operational effectiveness. When people are engaged and have a stake in the process, they contribute innovative ideas and insights, leading to more effective solutions and more agile organization.

You become disruptive!

Involving people in transformation processes leads to faster and more effective changes. Their active role contributes to cost savings, improves customer experience, and enhances overall operational efficiency.

Disruptive change thrives when we engage people in process improvements, empowering them to drive transformation and achieve gretaer operational efficiency.

Step #4: The Change!

Information is Power!
Process-Based Changes & Development

One-year Time Span
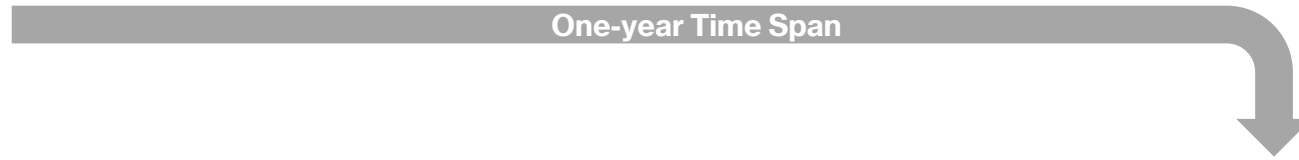
Staggering Results

Process Comparisson View in Adonis.

Current state process

Future state process

⬆ 80%
Customer satisfaction up 30%

⬆ +350
RPA & AI Solution deployed improving operation efficiency for CX, Finance and Billing

⬆ $5M
Savings due to operation efficiencies

⬆ 47%
Shift to Digital

Step #5: Connecting the Dots!

BE Disruptive!   https://youtu.be/Qgl1GlTk0Js?si=WPUSzFbiV1zrSFsB

Additional Resources

- ADKAR & Kotter's Change Methods
- CMMI
- Balance Scorecard
- TM Forum

ADKAR Model
Focus: Individual Change

Components:
- **Awareness**: Understanding the need for change.
- **Desire**: Building motivation to participate in and support the change.
- **Knowledge**: Providing information on how to change.
- **Ability**: Developing the skills and behaviors required for change.
- **Reinforcement**: Ensuring that the change is sustained and reinforced over time.

Kotter's 8-Step Change Model
Focus: Organizational Change

Steps:
- **Create a Sense of Urgency**: Highlight the need for change.
- **Build a Guiding Coalition**: Form a leadership team to guide the change.
- **Form a Strategic Vision and Initiatives**: Develop a vision and strategy.
- **Enlist a Volunteer Army**: Engage employees and stakeholders.
- **Enable Action by Removing Barriers**: Address obstacles and empower action.
- **Generate Short-Term Wins**: Achieve and celebrate quick successes.
- **Sustain Acceleration**: Maintain momentum and drive further change.
- **Institute Change**: Embed the new practices into the organization's culture.

Benefits of Using Both Models

Comprehensive Approach: Kotter's model provides a structured approach to leading organizational change, while ADKAR focuses on managing the individual aspects of change.

Enhanced Communication: ADKAR helps ensure that individuals are well-informed and motivated, aligning with Kotter's focus on building urgency and vision.

Effective Implementation: Using both models helps address both organizational and individual needs, increasing the likelihood of successful change adoption and sustainability.
By integrating ADKAR's focus on individual transitions with Kotter's strategic and organizational approach, you can create a robust framework that supports both the people and the processes involved in change.

How to Use ADKAR and Kotter's Model Together

Initiate the Change:
- **Kotter's Step 1**: Create a Sense of Urgency.
- **ADKAR Awareness**: Communicate the need for change to build awareness.

Build and Lead the Change:
- **Kotter's Step 2**: Build a Guiding Coalition.
- **ADKAR Desire**: Foster motivation and support for the change among individuals.

Develop Strategy and Vision:
- **Kotter's Step 3**: Form a Strategic Vision and Initiatives.
- **ADKAR Knowledge**: Provide information and training on the new processes and skills required.

Implement the Change:
- **Kotter's Steps 4 and 5**: Enlist a Volunteer Army and Enable Action by Removing Barriers.
- **ADKAR Ability**: Develop and support the skills and behaviors needed for successful implementation.

Reinforce and Sustain the Change:
- **Kotter's Steps 6 and 7**: Generate Short-Term Wins and Sustain Acceleration.
- **ADKAR Reinforcement**: Ensure the change is reinforced and embedded in daily practices.

Embed the Change:
- **Kotter's Step 8**: Institute Change.
- **ADKAR Reinforcement**: Continue to reinforce the change and ensure it becomes part of the organizational culture.

What is CMMI?

Capability Maturity Model Integration (CMMI) is a framework designed to help organizations improve their processes and performance. Developed by the Software Engineering Institute at Carnegie Mellon University, CMMI provides a structured approach for enhancing process efficiency, product quality, and overall organizational effectiveness.

Key Benefits

Process Improvement: CMMI guides organizations in developing and refining their processes, leading to more predictable and higher-quality outcomes.
Capability Assessment: It offers a method to evaluate current capabilities, identify areas for improvement, and implement changes.
Competitive Edge: By adopting CMMI, organizations can achieve better efficiency, improved customer satisfaction, and a stronger market position.
CMMI Framework

Models: CMMI includes different models tailored for specific needs, such as Development, Services, and Acquisition.

Maturity Levels: CMMI defines five maturity levels:

Level 1 - Initial: Processes are unpredictable and reactive.
Level 2 - Managed: Processes are controlled and project-specific.
Level 3 - Defined: Processes are standardized and organization-wide.
Level 4 - Quantitatively Managed: Processes are measured and controlled.
Level 5 - Optimizing: Focus on continuous process improvement.
Implementation and Appraisal

Implementation:

Adopting CMMI involves training, process adjustments, and cultural changes to align with the model's practices.

Appraisal: Organizations undergo evaluations by certified appraisers to determine their maturity level and adherence to CMMI practices. CMMI is a proven framework for organizations seeking to enhance their processes, drive performance improvements, and gain a competitive advantage.

The staged representation organises process areas into maturity levels.

In the continuous model, each process area is profiled individually by capability.

What is the Balanced Scorecard?

The Balanced Scorecard is a strategic management framework designed to help organizations align their activities with their vision and strategy, improve internal processes, and drive performance. Developed by Robert Kaplan and David Norton, it provides a comprehensive approach to measuring and managing organizational performance.

Key Benefits

Strategic Alignment:

The Balanced Scorecard ensures that day-to-day operations align with the organization's long-term strategy and goals.
Comprehensive Measurement: It provides a balanced view of organizational performance by integrating financial and non-financial metrics.
Enhanced Decision-Making: By linking performance measures to strategic objectives, it helps leaders make more informed decisions and prioritize actions that drive success.
Balanced Scorecard Framework

Perspectives:

The framework is based on four key perspectives:

1. **Financial:** Measures of financial performance, such as revenue growth and profitability.
2. **Customer:** Metrics related to customer satisfaction and retention.
3. **Internal Processes:** Indicators of the efficiency and effectiveness of internal operations.
4. **Learning and Growth:** Measures related to employee skills, organizational culture, and innovation.
5. **Strategy Maps:** The Balanced Scorecard uses strategy maps to visually represent the cause-and-effect relationships between strategic objectives across the four perspectives. This helps in understanding how improvements in one area can impact others.

Implementation and Monitoring

Implementation:

Adopting the Balanced Scorecard involves setting clear strategic objectives, defining relevant performance measures, and aligning organizational processes and goals.
Monitoring: Regular reviews and updates are conducted to ensure that performance metrics reflect the strategic goals and to adjust strategies as needed.

The Balanced Scorecard is a powerful tool for organizations aiming to translate strategy into actionable objectives, improve overall performance, and ensure that all aspects of the business contribute to achieving strategic goals.

TM Forum for ALL INDUSTRIES

Overview: TM Forum is a global industry association dedicated to accelerating the digital transformation of telecommunications and digital service providers. Established in 1988, the organization supports service providers and technology suppliers through a range of initiatives aimed at improving business processes, enhancing operational efficiencies, and fostering innovation within the telecommunications and digital ecosystem.

Core Functions:

Standards and Frameworks:

TM Forum develops and maintains industry standards and frameworks that guide organizations in adopting best practices. Key frameworks include the TM Forum Frameworx, which encompasses Business Process Framework (eTOM), Information Framework (SID), and Application Framework (TAM).

Research and Insights:
The Forum provides research reports, white papers, and insights to help organizations navigate emerging trends and technologies in the digital and telecommunications sectors.

Collaboration and Networking:
TM Forum facilitates collaboration among industry leaders through working groups, forums, and events, fostering an environment where members can share knowledge, discuss challenges, and develop solutions.

Training and Certification:
TM Forum offers a variety of training programs and certifications to support professional development and validate expertise in TM Forum standards and best practices.

Certifications:
TM Forum provides certifications that are essential for professionals seeking to validate their expertise and advance their careers in the telecommunications and digital service industries. The primary certifications include:

TM Forum Frameworx Certification:
Focuses on understanding and implementing TM Forum's Frameworx suite, including eTOM, SID, and TAM.

Digital Transformation Certification:
Aimed at professionals involved in digital transformation projects, providing a comprehensive understanding of digital transformation strategies and practices.

Business Process Framework (eTOM) Certification:
Specific to mastering the eTOM framework, essential for those working on business process improvements and operational efficiencies.
Resources: TM Forum offers a wealth of resources to its members and the broader industry, including:

- Knowledge Base: Access to a comprehensive library of standards, frameworks, and best practice guides.
- Webinars and Workshops: Regular events and online sessions to provide updates on industry trends and TM Forum initiatives.
- Community Forums: Platforms for discussion and collaboration with peers and industry experts.
- Events and Conferences: Opportunities to participate in industry-leading events and gain insights from thought leaders.

- For more information, visit the TM Forum website at www.tmforum.org.

I look forward to hearing from you. Let's talk soon!

Rolando Isaac Gonzalez

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🌐 www.linkedin.com/in/rolando-isaac-gonzález

📍 Panama

Thank You.

Igniting Improvement and Spurring Transformation in Latam

Summary

The critical importance of transforming and improving processes through standardization, collaboration, and digitalization.

Positive impacts on customer experience, employee efficiency, and operational success, particularly in the Latin American (LATAM) region.

Take aways:

▸ **Standardization Challenges:** Many processes lack clear definitions, business owners, or proper understanding, leading to inefficiencies, such as increased stress and extended customer wait times.

▸ **Digital Transformation Success:** The adoption of RPA and AI solutions resulted in significant operational improvements, including a 30% increase in customer satisfaction and $5M in savings.

▸ **Change Management Approaches:** Utilizing both ADKAR and Kotter's models ensures comprehensive and sustained change, addressing both individual and organizational needs.

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"Effortlessly publish BPM insights from your single-source-of-truth in Microsoft SharePoint and Teams. Create transparency, reach new target audiences, and enhance process engagement across your organization."
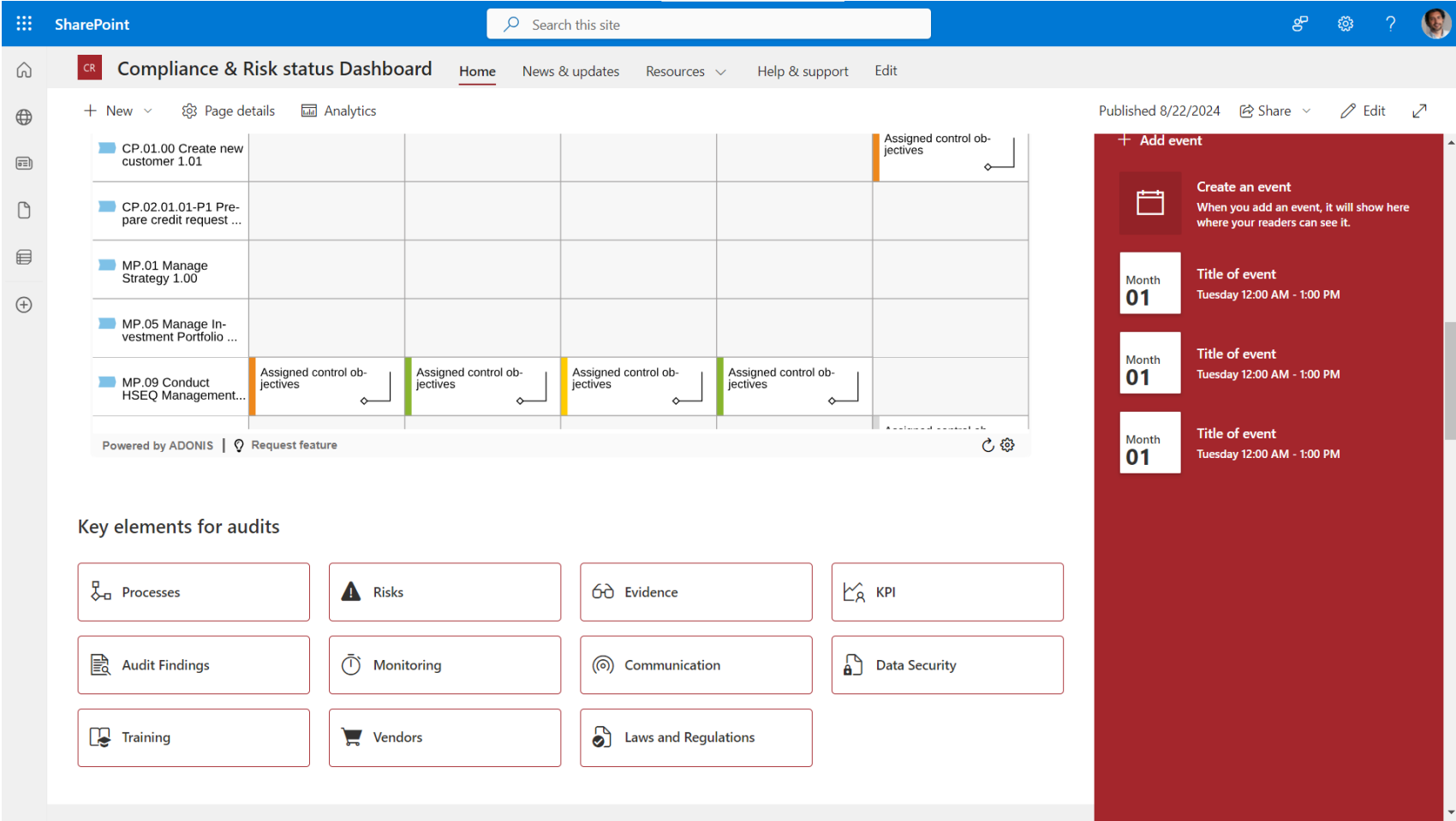
BOC Group

Flexible Documentation

Include ADONIS data
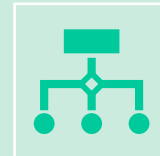
Combine with other data

Boost SharePoint with ADONIS Integration

▸ **Elevate your workspace** with ADONIS and SharePoint to visualize processes, combine data, and enhance decision-making.

Portals to empower internal communication
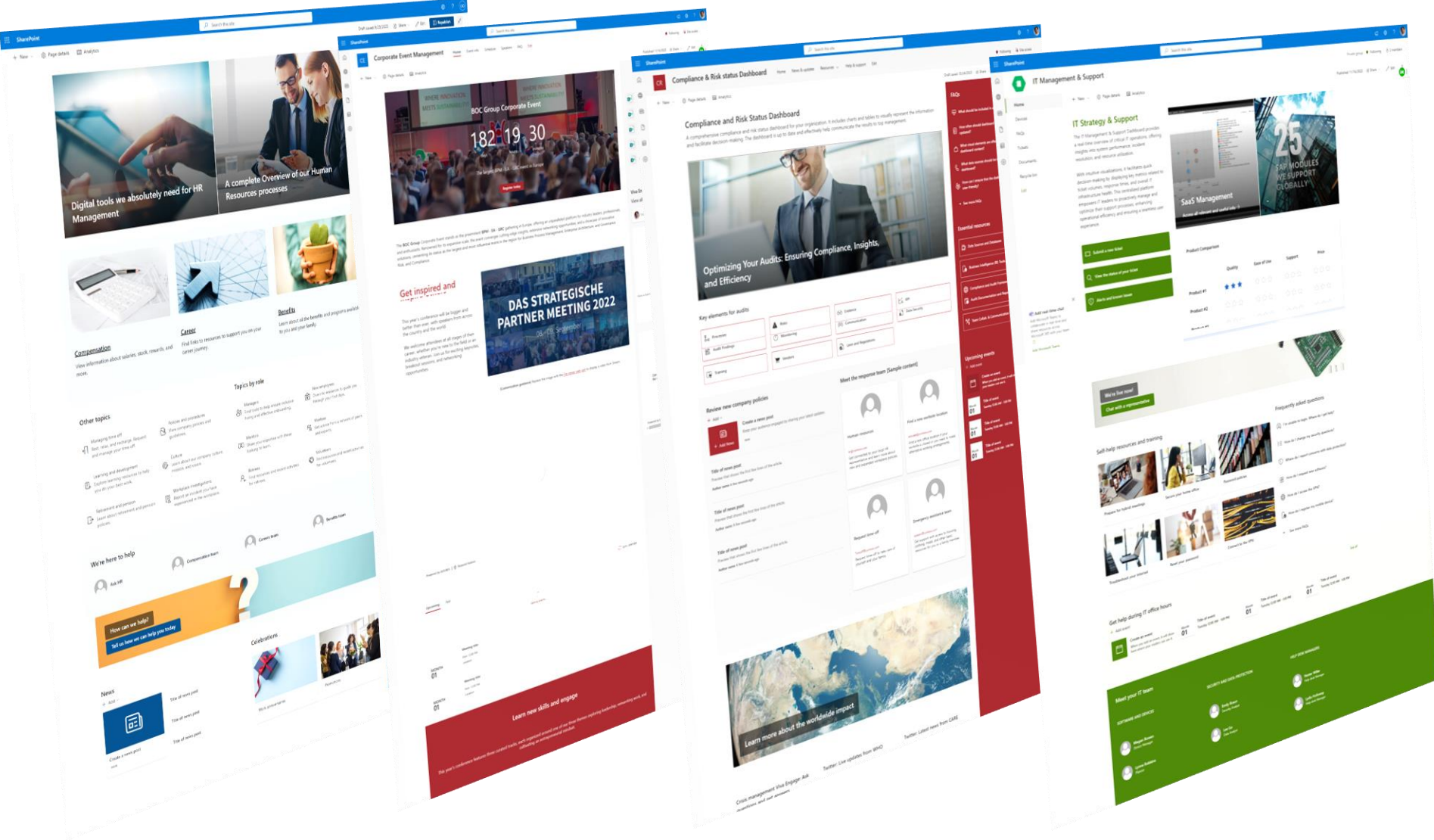
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