

# Transforming Customer-Facing Operations

## Case Study

### **Financial Services Organization uses BusinessOptix to transform its customer facing operations**

A well-known financial services organization had an objective to transform their customer facing work practices from ad hoc and siloed to continuously improving. They also discovered they needed an easier way to implement these work practices as they were finding new and better ways to work.

The journey started with the creation of a continuous improvement team whose first task was to transform the claims handling process. Early on the team recognized that documenting their as-is and to-be processes and finding a simple way to roll these out was going to be an important part of the transition.

At the time the business was using Visio and identified the need for a tool that would support the multiple dimensions (including: modeling, comparisons, version control, etc.) of their work.

Using BusinessOptix the organization was able to create, store and manage their processes. Initial BusinessOptix outputs included:

- illustrating current and future states
- creating and publishing training material
- capturing process risks
- enabling process sharing, reviews and approvals
- providing end-user activity reports and a central process library

As a result, the organization has made significant improvements in the way processes are designed, rolled out and managed throughout the organization. For example, processes are now documented, teams are able to easily capture and share process changes and teams collaboratively develop and deliver new and optimized processes.

## About BusinessOptix

At BusinessOptix, we help organizations Control Today, Navigate Tomorrow™ to achieve the next level of customer and operational excellence. Our cloud-based Business Process Transformation suite is used by hundreds of global firms to capture and redefine business operating and process models, accelerate transformations across the enterprise, improve operational efficiencies and streamline go-to-market processes.

For further information please visit our website, or contact us:

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