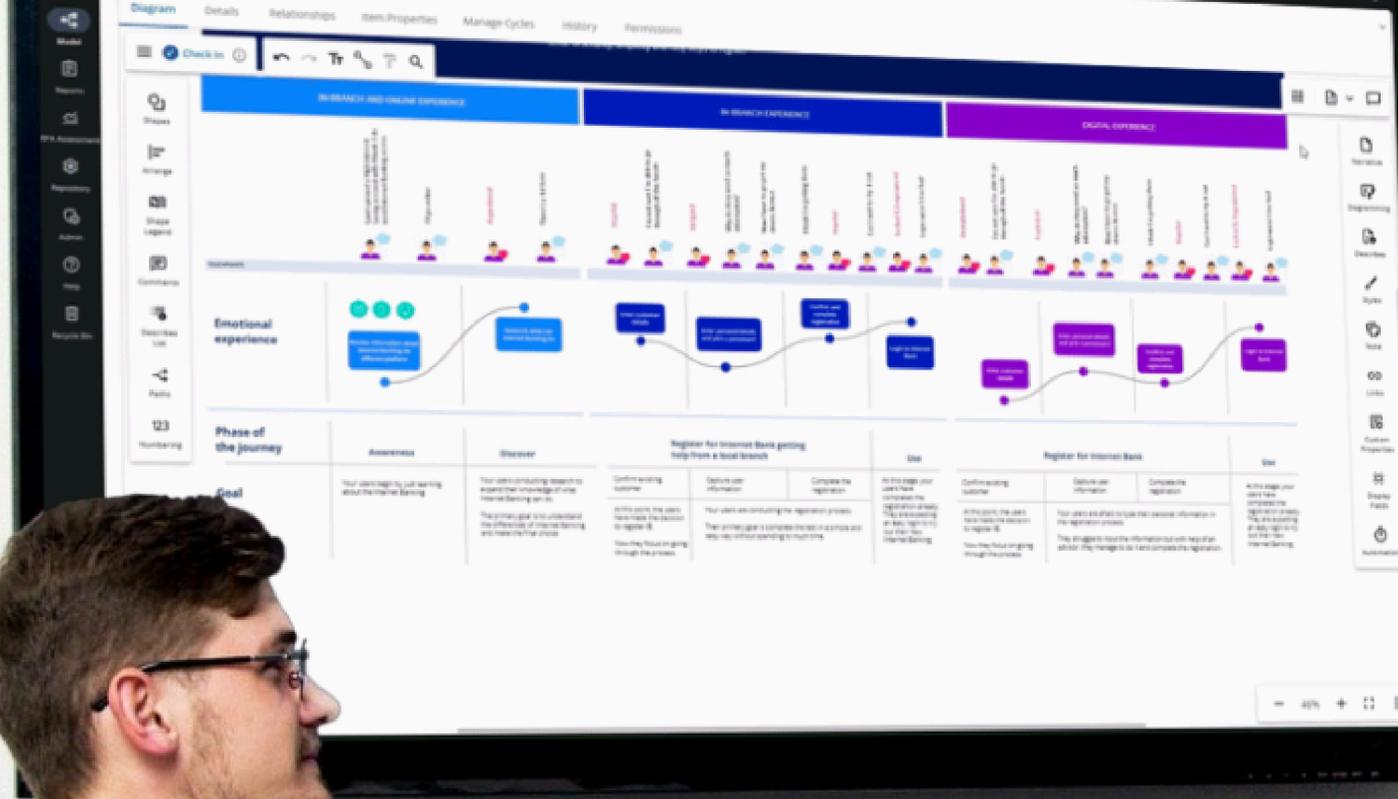


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Getting Started with Process Intelligence *The Complete Guide to Process Improvement*

A LEADER IN THE FORRESTER WAVE ON PROCESS INTELLIGENCE

What is Process Intelligence?

First, a definition. Process intelligence (PI) is the practice of using organizational data to understand how business processes are performed in real-world conditions. This includes analyzing existing processes and workflows in detail, pinpointing bottlenecks, and finding inefficiencies. The goal is to gain the insights needed to improve your processes.

Process Intelligence in Practice

An ideal process intelligence framework includes three basic phases: Discover, Design, and Optimize.

- ✓ During the **Discover** phase, you investigate your processes as they are. This means looking at how processes are running right now and how they fit into the broader business picture.
- ✓ The goal of the **Design** phase is to develop the ideal version of your processes, outlining how they should operate under optimal conditions.
- ✓ Finally, the **Optimize** phase is where your processes go live and you measure and tweak their performance as needed.

"Until a few years ago, organizations regarded process intelligence tools as helpful for process discovery and the visualization of very specific process categories, not so much as process improvement tools."

-Forrester

But it doesn't stop there. Achieving excellence requires a real and ongoing understanding of your processes. To meet that need, process intelligence solutions should provide tools to act on the data you discover, along with a way to monitor and continuously improve your operations.

The Importance of Process Intelligence

In recent years, businesses have increasingly adopted process intelligence. According to the “State of Process Intelligence, 2024” report from Forrester, fewer than 10% of global enterprise decision-makers indicated that they do not plan to adopt process intelligence tools in the near future.

And while the reasons for this rapid growth vary from business to business, the benefits of deploying process intelligence are clear:

- **Enhanced operational efficiency:** Including time savings, reduced costs, and fewer process bottlenecks.
- **Enhanced compliance:** Effective process intelligence tools facilitate the creation of well-documented processes, making it easier to ensure alignment with regulatory standards. That reduces the organization’s risk and simplifies audits and compliance checks.
- **Improved customer experience:** Streamlined processes and workflows enable businesses to deliver faster and more reliable service, driving brand loyalty and customer satisfaction.
- **Greater agility:** Process intelligence empowers businesses with data-driven insights, making it easier and faster to adapt their processes to meet changing needs and market opportunities.
- **Better alignment and collaboration:** Well-mapped processes give teams clearer insight into how their departments function. The best process intelligence solutions extend this visibility to the company at large, making it easier for teams to align with one another and overarching business goals.

Choosing the Right Vendor

The benefits discussed in the previous section are not just nice-to-haves. They're an essential part of process excellence. Realizing those benefits, however, comes down to finding the right vendor.

The ideal vendor aligns with your business, meeting both its current process maturity and its future needs as your processes evolve. And while there are a lot of options for who to partner with, focusing on key considerations and capabilities can quickly narrow your search:

Implementation and support

Look for a solution that's easy to set up and comes with responsive, ongoing customer support, both during onboarding and for day-to-day use.

Scalability and adaptability

Your PI solution should scale and grow with your business. That includes delivering value right from the start, even on small-scale or pilot deployments. Avoid vendors that have paywalled process intelligence behind a package of other software.

Flexible pricing model and price transparency

Good vendors will always be upfront about pricing. Great ones will give you options to suit your budget and your business's stage of process maturity.

Vendor credibility

Your vendor research should include customer reviews and expert opinions. Reliable sources like Gartner Peer Insights for customer feedback, or The Forrester Wave for analyst insights, are a great place to start. They'll also give you a sense of a vendor's reputation.

Evaluating Process Intelligence Platforms: Core Features and Key Capabilities

Once you have a vendor in mind, it's time to dig into their capabilities. And this is where it's worth making a key distinction. Many vendors (and analysts) focus primarily on the initial stage of process intelligence (the "Discover" phase outlined previously). That might mean an over-sized focus on process mining or few capabilities for managing and shaping processes once they've been mapped.

But to get true value from process intelligence, it needs to lead to ongoing actionable insights. And that means having systems and tools in place for shaping, managing, and monitoring your processes in the long term. Here are the capabilities to look for as you work through a shortlist:

Process mining

Process mining analyzes the data available in your organization's existing systems, allowing you to map and explore your workflows. In this context, granular is better, so look for a tool that can really break down process steps, e.g., by logging start and end timestamps or identifying processes that run in parallel.

Process monitoring and predictive analytics

Process monitoring tracks live processes to ensure they're meeting company goals. Meanwhile, predictive analytics uses machine learning to identify patterns in data that signal trouble ahead. When used together, these capabilities offer real-time insights into process performance, enabling you to optimize operations. This is particularly effective if your chosen platform includes tools such as dashboards and alerts to monitor performance.

Process modeling and simulation

Process modeling complements process mining by adding context and details, such as regulatory requirements or the people involved in the process. Once you have an accurate model, you can test proposed process changes using process simulation. This ensures your live process will run as intended.

Centralized process management

To manage processes effectively over time, your process models—along with all their context—should be stored in a centralized database or process repository. This allows users across the company to easily check how processes work and to contribute to their management. Quality-of-life features, such as the ability to link, tag, or cross-check processes, add greatly to the utility. So, make sure to look for a solution that supports these functions.

Generative AI

GenAI is the new process intelligence buzzword, but that doesn't mean all vendors are implementing it effectively. Ideally, this capability should democratize process intelligence, allowing anyone to engage with processes even if they don't have technical skills or BPMN expertise. That includes being able to create process diagrams using natural language and through the upload of unstructured documents, like SOPs.

Risk and compliance management

Process intelligence is your organization's MVP when it comes to risk and compliance management. Having clearly documented processes ensures all team members know how a process should unfold and can take a risk-informed approach to sensitive processes. They also provide an easy point of reference during audits and compliance checks. Useful features in this context include being able to annotate individual process steps (e.g., with regulatory requirements) and predictive analytics for proactive risk assessment.

Great user experience (UX)

An easy-to-use platform with an intuitive UX design ensures your chosen process intelligence tool will be used across the business. Look for features like drag-and-drop functionality, customizable dashboards and reporting, and collaboration tools to reduce the learning curve.

Integration support

An effective process intelligence solution should integrate smoothly with your existing software ecosystem—but don't assume that's automatic with every vendor. Confirm that your chosen solution offers robust APIs for integrating tools like ERP or CRM platforms and that it enables smooth two-way data transfer. An ideal tool is one that enhances the functionality of your existing systems and improves the ROI they already deliver. So, if a new process intelligence platform would force you to replace existing systems, it's probably not the right choice for your business.

"The true value of these tools lies in their ability to visualize and analyze processes across silos in order to generate customer value"

-Forrester, *State of Process Intelligence, 2024*

Driving Industry Transformation with Process Intelligence

While the overall value PI tools bring to the table is universal, the key benefits often vary by sector—with each using process intelligence to tackle unique challenges and priorities. Be sure to check that your chosen vendor's offering aligns with the needs of your industry and can effectively tackle any unique demands.

Banking and Financial Services



A key challenge for the modern banking and finance industries is how to develop rapid, personalized services while balancing regulatory requirements and managing risk. Process intelligence offers a number of key advantages in this context, allowing institutions to:

- Trial new products and concepts before deployment
- Automate and digitize steps in the lending process
- Manage compliance and risk
- Ensure effective segregation of duties

Healthcare



In the healthcare sector, process intelligence helps providers adapt to trends like virtual care cost-effectively, while still ensuring they deliver the best possible service and prioritize customer wellbeing. This includes:

- Decreasing customer onboarding times to speed up care
- Validating the impact of staffing decisions
- Maintaining patient confidentiality and data compliance
- Implementing effective need-to-know controls for employees

Insurance



Process intelligence solutions address several core challenges in the insurance industry, including modernizing and streamlining processes and combating the rising cost of doing business. Using PI tools empowers insurers to:

- Stay competitive by prioritizing digital transformation efforts
- Reduce claim processing costs while improving service delivery
- Detect and address insurance fraud
- Comply with SLAs for claims management and customer onboarding

Manufacturing



Key challenges for global manufacturers include a challenging logistics environment and rising costs. Using process intelligence, manufacturers can streamline their operations and boost brand loyalty, by:

- Improving production time and product quality
- Enhancing the effectiveness of smart factory and Industry 4.0 deployments
- Ensuring compliance with regulations like OSHA
- Building resilient supply chains in the face of disruption

Making the Business Case for Process Intelligence

Choosing the right process intelligence solution is just the first step. The next challenge is securing buy-in from across your organization. This could mean persuading leadership in other teams to pilot initiatives or clearly demonstrating the platform's value in a way that aligns with their goals. While the specifics will depend on your company's unique objectives, you can use three key strategies to guide your pitch:



Quantify ROI

A well-implemented process intelligence initiative leads to measurable improvements in efficiency, cost savings, and revenue. The key to getting buy-in is to demonstrate that value with hard numbers. It's not a "one-and-done," however, and you'll need to be able to prove the continued return on investment of a PI platform. This is why one of the selection criteria for your process intelligence solution should be that it can demonstrate immediate value—within a few weeks of making the investment.



Demonstrate strategic alignment

Investing in process intelligence is a logical progression for companies focused on digital transformation. But to make a business case for investment, you must be able to demonstrate how your chosen platform's capabilities tie into specific strategic goals. For example, if the company is focused on sustainability, how will investing in PI make your processes less wasteful? Demonstrating this type of strategic alignment is also a great way to boost buy-in from specific team leaders or stakeholders, especially if the changes you want to make align with their own pet projects or objectives.



Tailor your approach

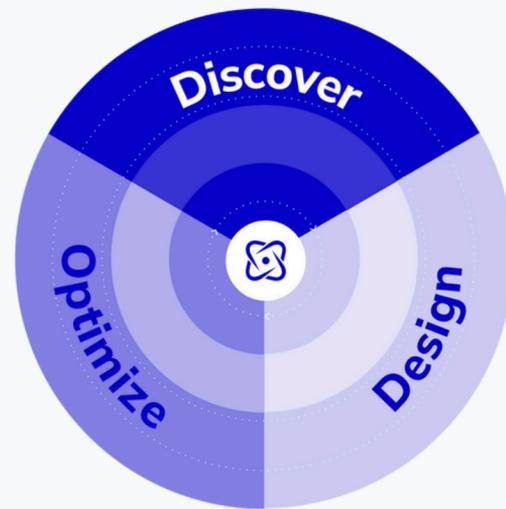
Finally, tailor your business case to secure buy-in from leadership within specific line-of-business teams. This means understanding their perspective and presenting value propositions that speak their language. For example, if the sales team stands to benefit hugely from a successful process initiative, show the leadership over in sales exactly how PI will address their team's pain points and improve quality of life and performance.

Next Steps to Process Excellence

The iGrafx Approach

Discover

Discover how your business processes run today



Design

Design the ideal future versions of your processes

Optimize

Optimize processes for maximum performance

Mastering process intelligence can give your business the tools it needs to thrive and adapt to new opportunities. But a big part of getting it right is being thoughtful and strategic about who you partner with to ensure true process excellence.

For organizations looking to take the next step, iGrafx offers Process360 Live. This is an integrated, scalable intelligence platform designed to support every stage of the process journey - from initial discovery and process design through to optimizing processes in flight.

If you'd like to see exactly how it works, [book a free demo](#). Or to learn more about our strategic approach to deploying process initiatives in your organization, you can download our handbook:

[Getting Started with Process Intelligence: A Comprehensive Guide for PEX Professionals.](#)

Thanks for Reading,

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