



CASE STUDY



Industry Banking
Solution Development and implementation of a process automation solution – Generics Workflow Platform

- Highlights**
- Business processes identification, analysis, optimization and support
 - Integration with existing systems
 - New business processes parameterization in less than 1 day
 - Continuous process improvement and access to business information in real-time
 - More than 400 processes automated
 - Search for any process and results in less than 10 seconds
 - Most widely used workflow in just one year

Technology IBM Business Process Manager 

BPM and process automation at BES Group

With the growing prominence of BPM (Business Process Management) in organizations, BES Group was looking for a solution to support the identification, analysis, optimization and support of their business processes. From this need, emerged a strategic and innovative project. The Process Automation Platform (so-called Generics Workflow Platform) developed in partnership with SAFIRA has become, in just one year, the most widely used workflow in BES Group, automating more than 400 processes. With the success achieved in Portugal, BES Group is making an investment in the internationalization of the platform, which now also supports BESSE Bank (BES Spain) and is prepared to be launched in other geographic regions.

The Challenge

In a context of endless innovation, organizations are forced to seek new ways to improve their performance in key areas, but typically antagonistic. Improving quality of service, increasing organizational performance and combining these challenges with cost reduction, represents what seems to be an impossible task. But technology is here to give the necessary support.

BES Group, through Espírito Santo Informática (ESI), found in BPM technology the basis to address in record time the numerous requests from all business areas - a paradigm shift in the role of IT today. Traditional organizations are faced with long development cycles (application-centric) and high maintenance costs to adapt information systems to business change. It is by adopting a process-centric model that the organization gets the agility to adjust itself to business change. This process-oriented model leverages optimization and automation, and reduces the cost of change. The visibility provided (eg scorecards) also ensures the conditions for the adoption of an effective governance model.

In 2007, BES created a 'BPM Center of Excellence' and ESI adopted an IBM innovative platform (formerly Lombardi Teamworks), aggregating all skills associated with BPM in the same shared model and enabling the rapid development of solutions and the rapid response to all business requests.

Analyzing the complexity of organizations processes, we verify that there is a minor amount of complex processes with little human interaction and needing an extended IT intervention on design and maintenance. However, there is a major amount of simple processes (often supported by e-mail) that hold

"The Generics Workflow Platform is a critical tool for BES Group and a centerpiece in our global approach to processes. In addition to complex processes managed by the IT we now have business areas with full autonomy to implement and improve simpler processes in terms of flows, rules and screens. SAFIRA realized that this was our biggest goal and the result has been extremely positive. We are now a more agile, efficient and competitive organization."

BES Representative

The main features of the **Generics Workflow Platform** include:

- Permissions for process creation per department and per user integrated with Active Directory; definition of confidentiality rules per department or per user
- Direct and automated process workflow
- Service levels definition for each process and activity
- Alarm systems configuration for users and supervisors
- Document management for each process; integration with IBM Content Management on-demand and IBM Content Management in digital archive, and Adobe Life Cycle for electronic forms
- Search for any process and results in less than 10 seconds
- Information about process traceability and auditing
- Notification of users who get involved in the process, for its conclusion
- Workload management via tasks lists. Tasks can be assigned to user groups, allowing users to work collaboratively while ensuring that only one can perform a given task at a given time
- Unlike email, the system ensures accountability. There are always well-defined managers for each process. All relevant information is recorded (eg, users identification and log activity)

the highest level of human interaction, being essential their optimization, monitoring and control to enable business development. By obtaining significant advantages in time-to-market and operational efficiency, GBES intended to introduce them in other business processes.

The Solution

Accepting the challenge and using the existing platform (IBM BPM), SAFIRA developed a process automation solution – so-called **Generics Workflow Platform** – that instantly allows to take IT support advantages to processes with human interaction (eg processes with a document-flow logic based on Fax or Paper) or to ad-hoc processes (eg processes supported by e-mail).

Email is the communication basis for supporting hundreds of business processes, however it does not provide essential features such as visibility on process traceability, monitoring, service levels, etc..

In order to fulfill its main objective, the solution provides a **user-friendly back-office interface that hides the complexity of modeling** and design a business process in the BPM tool to allow quick process configuration by users without technical skills (eg, business analysts).

Process parameterization in back-office is performed by business analysts who can, at an early stage, have no detailed knowledge about them. The platform itself gathers real information about the process in order to assist the process analysis.

The parameterization of a new business process is performed in less than one day. From there, all users can perform their traditional tasks benefiting from the BPM support provided by the platform. The organization is now able to guarantee **real-time information on the execution of the process**, enabling the discovery and optimization of business processes. The optimization can also be entered into the system, enhancing its performance and allowing the continued reduction in operating costs.

To ensure a greater risk and operating costs reduction there were some integrations with existing systems. The solution has been extended to allow **integration with customer management systems and thereby increase the efficiency in supporting customer-oriented processes.**

It was also integrated with **document management** systems, allowing a unified view of the process in a process-flow and not only document-flow logic, with very significant benefits in operational efficiency resulting from the processes dematerialization and respective workflows optimization.

The Results

The **Generics Workflow Platform** went live in early 2009 at BES branches, central departments and overall network.

In just one year it became the most widely used workflow within the organization, supporting over 100 processes in 2009. Currently it supports more than 400 business processes in BES and BAC (Azores Bank), and creates over 20,000 requests per month (900/day). Taking advantage of the platform support, users run more than 61,000 tasks per month (2700/day).

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The platform supports **different types of processes in a wide range of GBES business areas** (ex: Cards, Payments, Credit, Customer Management, Savings and Investment, Direct Channels and Human Resources). Moreover, it allows to maintain a flow of weekly improvements with a **record of an average of 18 improvements per week.**

The solution was strategically integrated in the cycle of continuous improvement, allowing the support of all the organization's processes (simple or complex). As an example, BES Leasing Approval system was supported by **Generics Workflow Platform.**

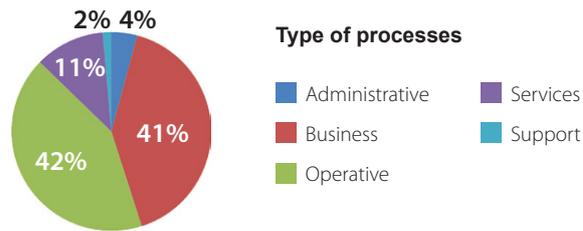
The platform provides key performance indicators in order to promote the cost/benefit evaluation of IT investments. It also allows to collect data on process execution (eg who sends emails/faxes; to whom?; who answers?) and, by giving a complete view of reality, it is a valuable tool in the analysis and implementation of a future customized solution.

The success of this program was the focus on stakeholders satisfaction:

- **End Users** - (Branch Employees, Account Managers, etc.) - set of features that allow GBES employees to complete their tasks quickly, with less effort and with minimal interactions
- **Process Operation and Implementation Managers** - Access to all information about the process and scorecards to monitor the performance of operational areas. Notification on failures in service levels, ensuring the completion of processes on-time and on-budget
- **Process Managers** - Access to all information to make decisions about the IT program management, allowing processes knowledge and projects prioritization. Process managers can autonomously configure and deliver IT support for new business processes. Process configuration and deployment is performed in less than one day. Access to reliable information to analyze new processes or optimize existing ones
- **Administration** - Total view (scorecards and detailed) about the reality of all the organization's processes. Lower costs and greater organizational efficiency. Ensure accountability, auditability, performance, etc.

"Banco Espirito Santo is doing the most advanced work I'm aware of... practical work in this area..."
(In <http://vimeo.com/15680641>, minuto 26).

*Phil Gilbert
BPM Unit Director
IBM Corporation*



With this solution, GBES can:

- Bring the benefits of BPM and IT support to the organization's processes and provide the supporting tools for monitoring, auditability and dematerialization
- Radically increase efficiency in obtaining solutions for simple processes (providing IT support for business processes in less than one day)
- Reduce the existing IT bottleneck through a platform that enables business areas' autonomy
- Ensure rapid adaptation to changes
- Continuously improve processes, allowing the access to reliable management information, in real time, about any process implemented in the platform
- Identify and discover processes with information from its real implementation
- Measure the processes volumetric in order to prioritize support requests and have a better cost/benefit analysis of investments

With a broad experience in innovative projects designed for large organizations, SAFIRA is a strategic business partner for companies that want to achieve high levels of excellence.

ESI – ESPÍRITO SANTO INFORMÁTICA

ESI is a complementary group of companies that started its activity in 2006 with the objective of managing information systems belonging to BES Group.

More info at www.bes.pt and www.esi.pt

SAFIRA

Founded in 1997, SAFIRA develops Information Technology Solutions and offers Consulting Services to leading companies all over the world. The company reached an outstanding reputation and acknowledgement in sophisticated and high demanding market segments through its focus on excellence of service, customer satisfaction, and innovative solutions that produce tangible business results.

More info at www.safira.pt

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