



Women And Technology Today Training 230:

Transforming Your Organization Into a Well-Oiled Machine

Optimized Productivity and Collaboration Through Workflow Solutions

Course Instructor:

Joy E. Spicer, President & CEO, Elegrity, Inc.





- The Voice for Women in Business in our Nation's Capital.
- National nonpartisan public policy organization representing over half a million Women Business Owners including 51 business organizations.
- Advocates for and on behalf of women and minorities in business.
- Thirty-two local Instant Impact teams across the country engaging with legislative officials and the business community to advocate for Women Business Owners.

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WATT Program:

National program from WIPP's "Women, Money and Opportunity" series.

The WATT program is designed to educate women business owners on strategies to accelerate growth by understanding technology investment, and how to manage it.

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Joy E. Spicer
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Elegrity, Inc.



Overview

- Workflow / Business Process Management

Basic Workflow Example

- Document Collaboration / Workflow

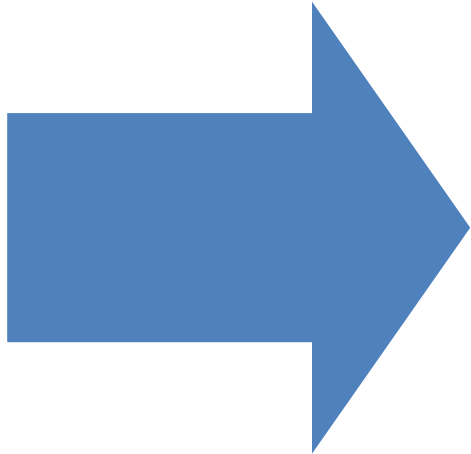
Enterprise Process Example

- Contract Management

Thinking about your business differently

- Understanding your core processes
- Identifying key pain points
- Gaining advantage with workflow

OVERVIEW



Nearly every business activity is a process

- Your procedures for...

New Hire / Terminations, Invoice
Approval, Document Review,
Change Request Approval, etc

... are all Business Processes that can be **Improved** using
Workflow / Business Process Management

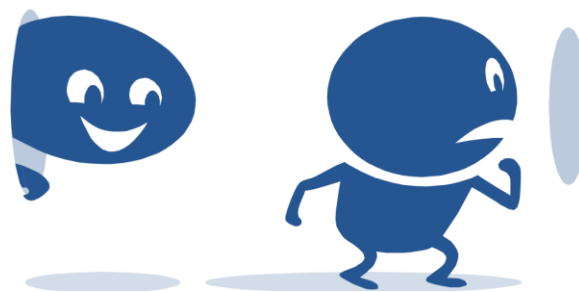
When Should I Use Workflow? – Recognizing the Symptoms



Confusion



Frustration



Fear

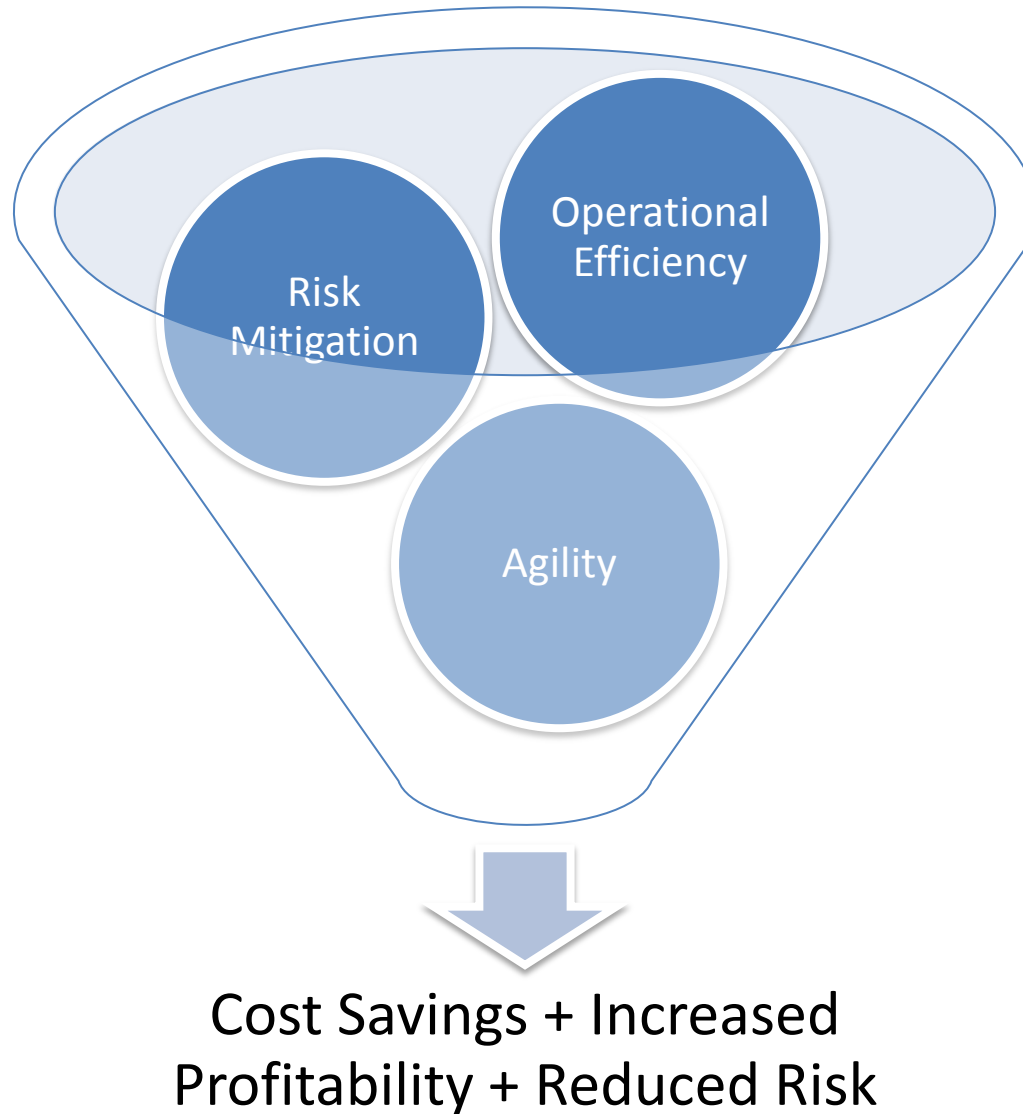
Benefits of Workflow / BPM

Enforce consistent business process across organization

Provide visibility to all involved users

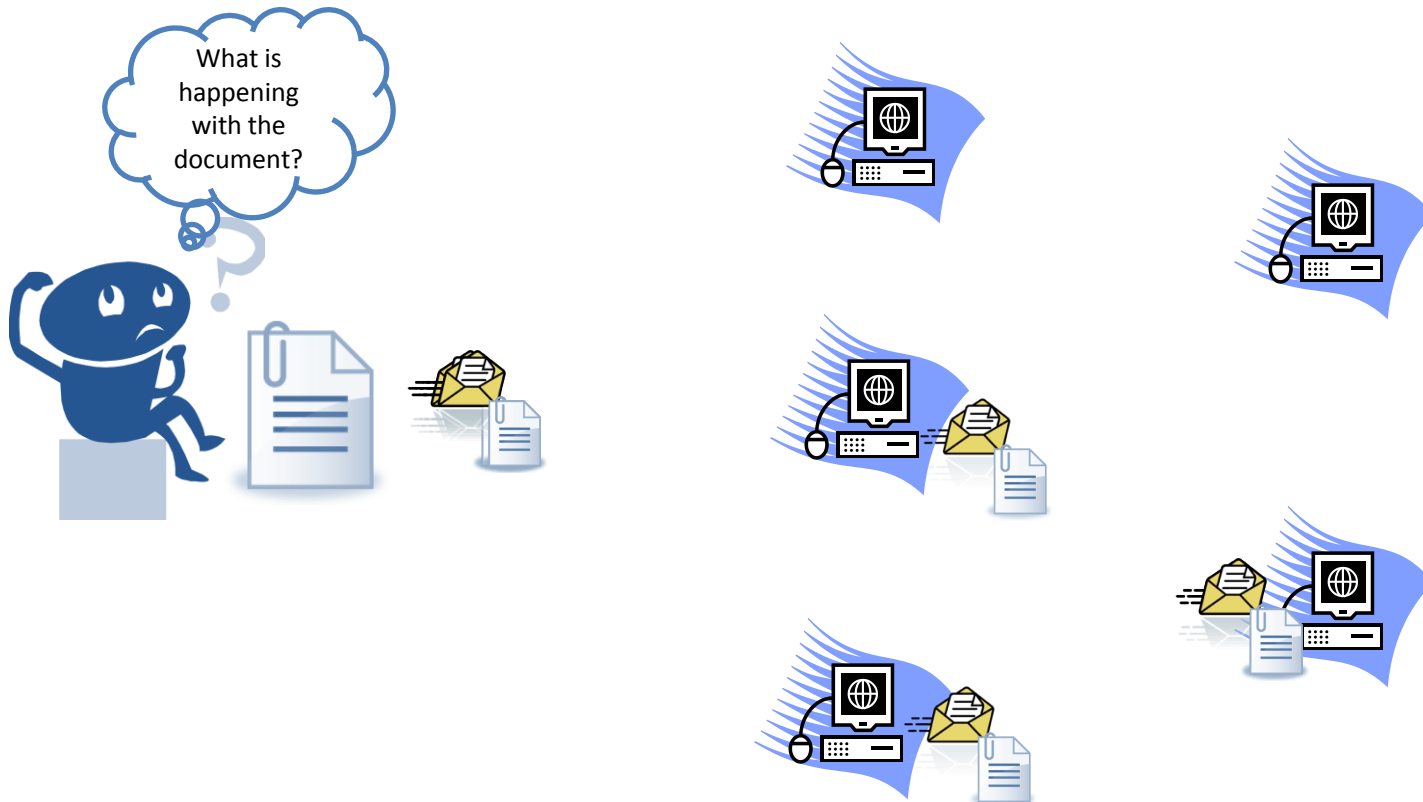
Involve appropriate users at the right point in the process

Integrate with key business systems for information retrieval and update as part of the process



EXAMPLE #1 – BASIC WORKFLOW – DOCUMENT ROUTING

Document Collaboration – The Challenge



I'll tell 2 friends, then you'll tell 2 friends, and so on....

💣 The minute there are **two or more** collaborators on a document, workflow collaboration tools should be leveraged for the greatest efficiency and effectiveness.



The Challenge

- Exceptional time-waste (=COST) for managing documents and records
- Multiple versions of files
- Frustration, Confusion & Fear (OMG...did we send the wrong version to the client??)

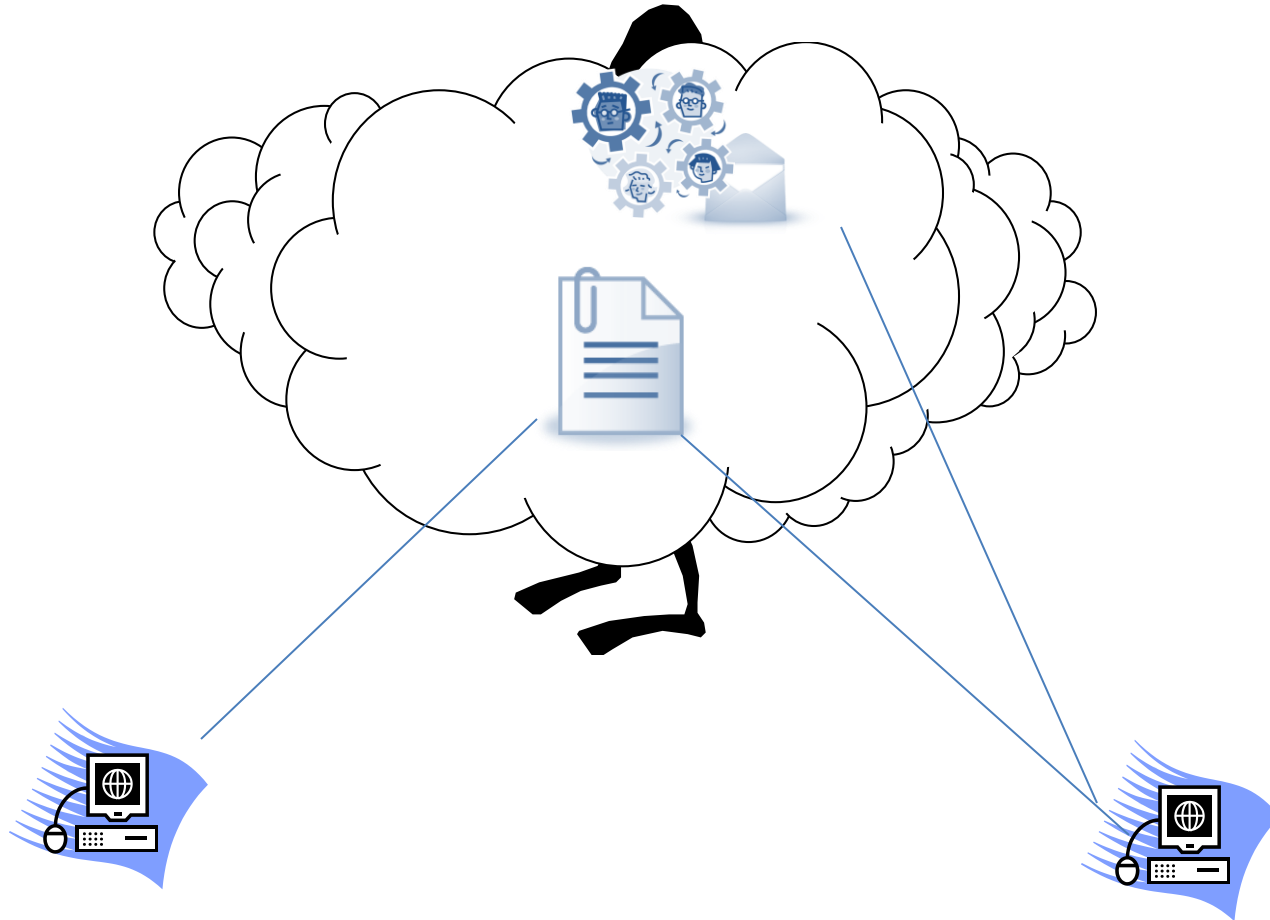
The Solution

- Thoughtfully organized and centralized document repository
- Document collaboration workflow



Let's Take a Look!

DEMO #1 - DOCUMENT ROUTING WORKFLOW



Started from standard template; One version; Efficient collaboration

EXAMPLE #2 – CONTRACT MANAGEMENT WORKFLOW



The Challenge

- End-user confusion – required info? Where is it?
- Heavily paper-based
- Lack of consistent controls and policy enforcement.
- Duplicative data entry costing excessive operational resource time.

The Solution

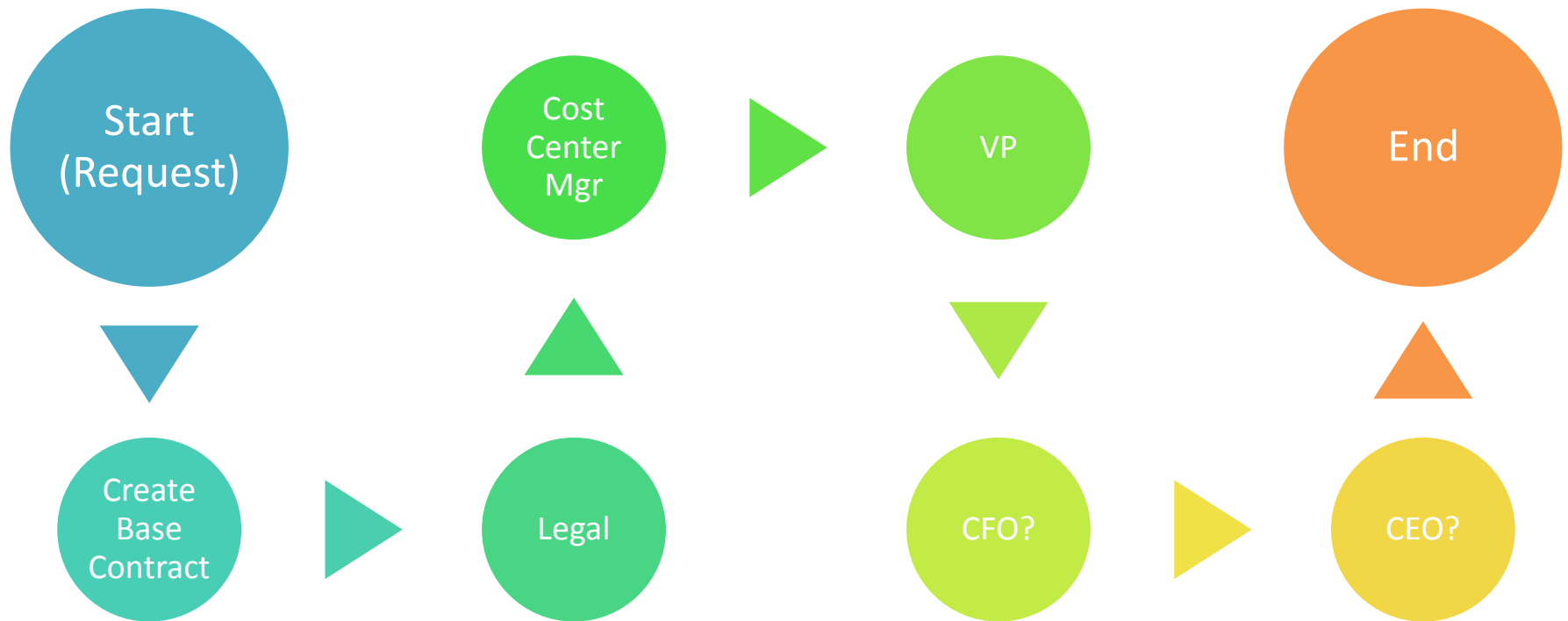
- “Drive’ user inputs intelligently.
- Eliminate paper with electronic forms.
- Integrate key business systems
- Give end-users clear visibility

Let’s Take a Look!



DEMO #2 – ELECTRONIC FORMS & ENTERPRISE WORKFLOW

Contract Request Example



- If Contract Value > \$50k, and NOT budgeted, CFO required.
- If Contract Value > \$100K, CFO & CEO required.

Use Case #1: Legal, Cost Center, VP

Existing Entity
(entity exists in
ERP system)

Contract Value <
\$50k

Contract
Budgeted

Use Case #2: Legal, CC, VP, CFO

New Entity

\$50k < Contract
Value > \$100k

Contract NOT
Budgeted

Use Case #3: Legal, CC, VP, CFO, CEO

Existing Entity

Contract
Value > \$100k

Contract
Budgeted

The Results

Contract requests glide through the process as users are 'driven' intelligently through the process and data requirements based on business rules.

No more paper!

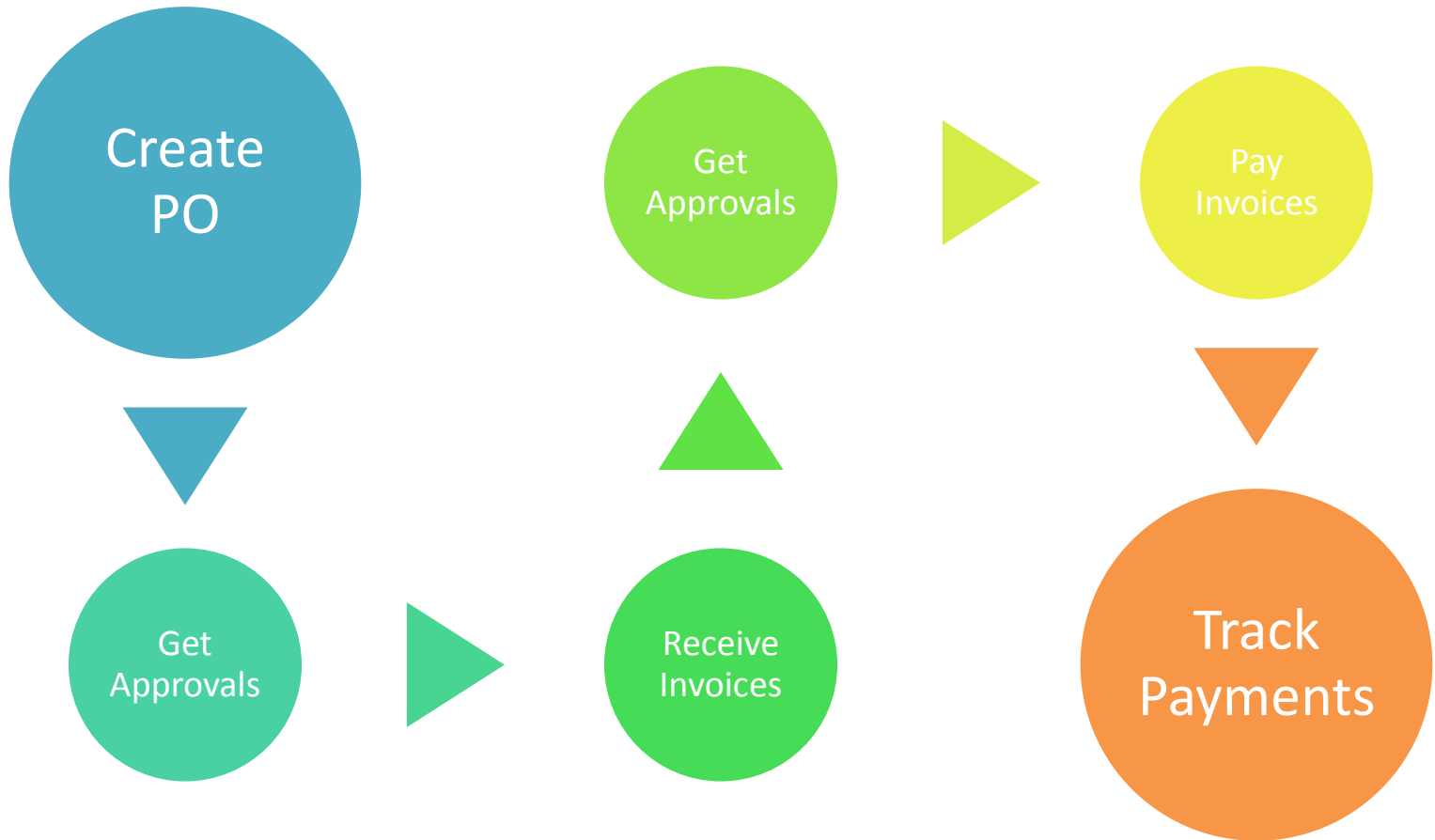
Controls around the process and information required are enforced through codified business rules.

Requestors can always see where their requests are, and key operational teams have immediate view into the workload for their team.

Executive approvals are handled via email on mobile devices.

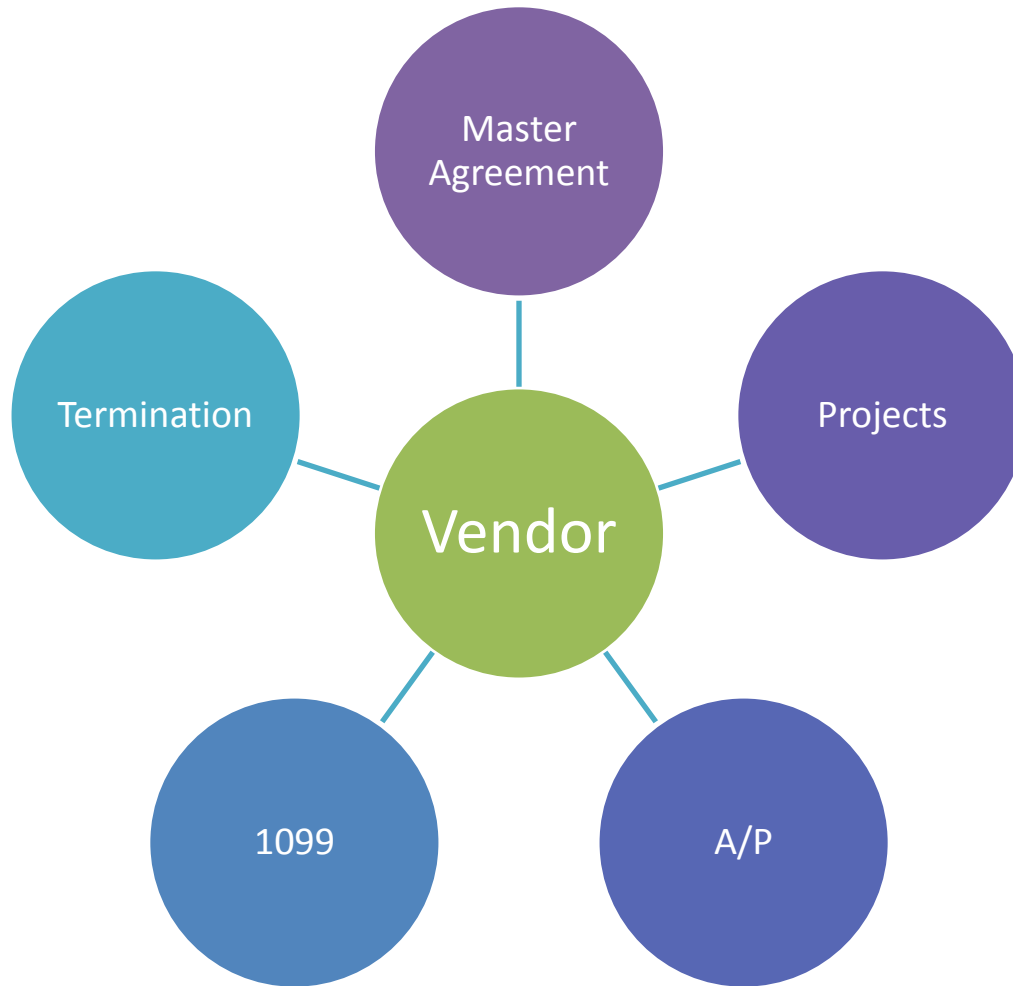
Business systems integrations with the ERP, HR and Document Management systems eliminates duplicative data entry, reducing cycle times significantly!

And on....

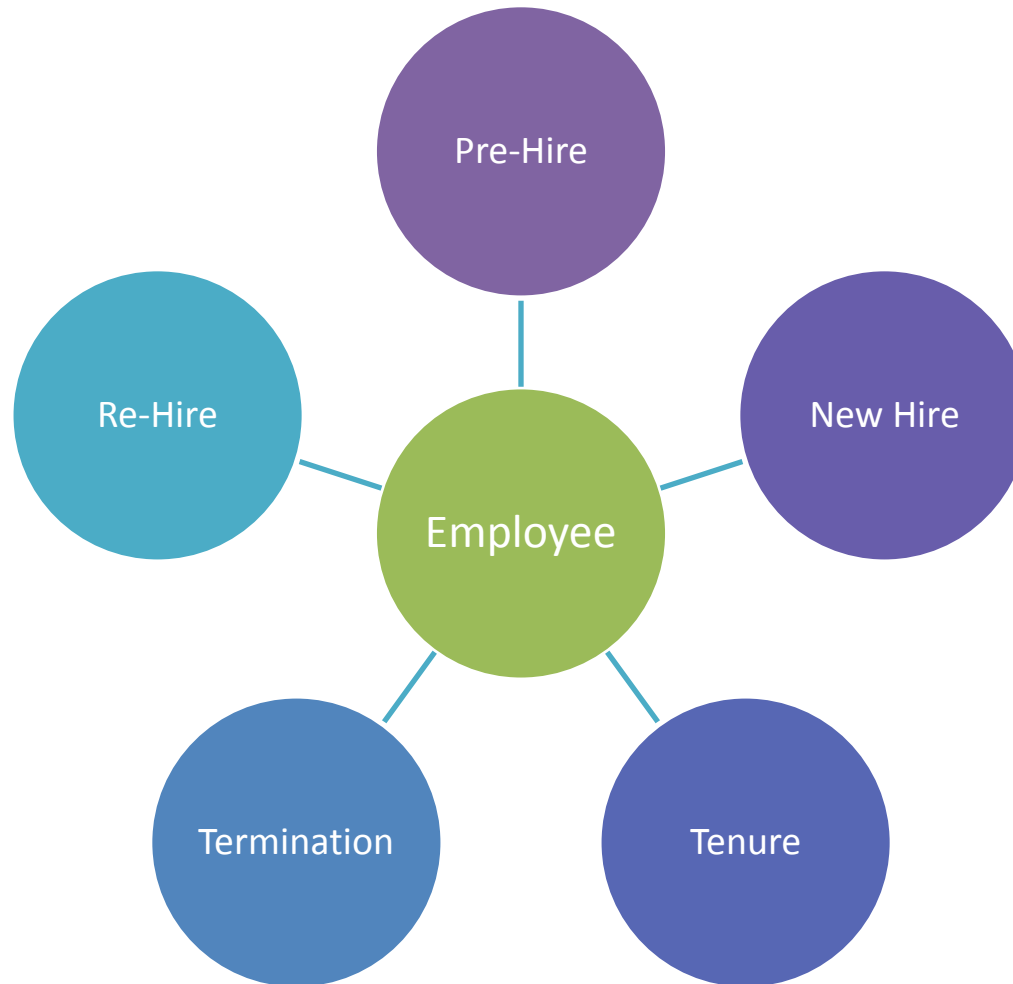


THINKING ABOUT YOUR BUSINESS DIFFERENTLY – A COLLECTION OF PROCESSES

Every business process is about a 'subject' ...and every subject has an identifiable 'Lifecycle'...identifying these lifecycles is a great place to start.



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GETTING STARTED

1

Pick a process...any process!

2

Develop to-be-process model and translate to solution (get help).

3

Implement, monitor, improve.





Happy!



Takeaways

- **FREE** Business Process Analysis!:
 - Call Elegrity to figure out if you can use this benefit: **415-821-0900**
- More Detailed Info on Workflow:
 - <http://www.elegrity.com/content/bpmworkflow>



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Programs Powered by WIPP:

Women, Money and Opportunity combines policy, resources, and a wealth of knowledge from experts within the WIPP community to educate women business owners.



Give Me 5

WIPP Gateway Program for Federal Contracting

www.GiveMe5.com



Women Accessing Capital

WIPP Gateway Program for Securing Funding

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Entrepreneurs, Energy & Environment (E3)

WIPP Gateway Program for Opportunities in Energy & Environment

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Women And Technology Today

WIPP Gateway Program for Understanding Technology in Business.

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Get Involved!

- Energy & Environment, Procurement & Healthcare Committees
 - Local Instant Impact Teams
- Weekly Policy Updates Relating to Your Business

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