

THE PEX REPORT 2020

GLOBAL STATE OF PROCESS EXCELLENCE:

*Navigating business change and nurturing
cultural transformation*

INSIDE

General Ann Dunwoody

US four-star general on
inspirational leadership
and process excellence

Brenton Harder

BNY Mellon's Head of PEX
on why you need to get a
grip on data

René Carayol

CBI advisor and management
guru outlines where to find
transformational ideas

Supported by:



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Editor of PEX Network
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"The PEX Report 2020 is your guide to shaping the culture of your organization in the year ahead, so that transformation will not be just a matter of survival; it will be a platform for continued growth, innovation and excellence."

Ian Hawkins

Editor of PEX Network

Introduction

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Businesses are facing transformation as a necessity. What they cannot do is stay as they are, because that is a sure strategy for failure.

In a transforming world, businesses are finding that mere change is not enough. What's holding us back? Contributor René Carayol says that today's CEOs are good at incremental change and transformation is scary because "CEOs don't want to become amateurs overnight". Partly this is because in PEX and OPEX we have the word 'excellence' in the title, and we know that transformation means a leap out of the comfort zone and into experimenting, testing and getting it wrong.

Four-star General Ann Dunwoody says: "A leader should never walk by a mistake, because you just set a new lower standard." The road to transformation will require a lot of stopping to correct mistakes; this is the challenge that needs to be faced.

In the past, we've been sold on the idea of technology solving all our problems, with organizations deploying RPA to reduce their headcount. They found that the robots didn't push human workers off the table; instead, they made the table bigger. Pointing to how robots are augmenting human work, Nimesh Sharma, head of RPA at Travelport, says: "Just automating an activity or series of activities is not what efficient automation should be doing."

Through our industry-wide global survey and contributions from world-class thought leaders, this report will explore the opportunities that lie beyond transformation for every business in every industry. This report points to a future when we will find it hard to imagine what it was like to work without robot help. It also provides a framework for how to make that future happen. Every business is a people business (a statement that many of this report's contributors made). People make a culture, and culture makes transformation work. The *PEX Report 2020* is your guide to shaping the culture of your organization in the year ahead, so that transformation will

not be just a matter of survival; it will be a platform for continued growth, innovation and excellence.



IAN HAWKINS

Editor, PEX Network

Just automating an activity or series of activities is not what efficient automation should be doing."



Nimesh Sharma

Head of RPA at Travelport



Commentators

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**SAMANTHA BUREAU-JOHNSON**[in](#)

Samantha Bureau-Johnson is Vice President, Business Process Solutions and Project Management Office at Blue Cross NC. Samantha has experience executing business strategy within operations and IT across multiple industries. Her proven track record of delivering business outcomes has led to business agility, enterprise alignment and execution frameworks that foster innovative transformational change.

**ANN HERON**[in](#)

Ann Heron is Chief Strategy Officer at Pendo Systems, leveraging the experience gained with PwC's Financial Services Risk and Regulatory practice and a 26-year career with The Federal Reserve Bank of New York to advance the C-suite change agenda. Ann's expertise centers on identifying transformational improvement opportunities for the effective and efficient operational execution of a firm's strategy across people, process, technology and data.

**RENÉ CARAYOL**[in](#)

René Carayol is a leading business expert specializing in transformational change, culture and leadership. He has been a visiting professor at the Cass Business School, a broadcaster and a board member of companies including Pepsi, Barclays and IPC Media. René has served as an advisor to the CBI, McKinsey and PA Consulting.

**DEBASHIS SARKAR**[in](#)

Debashis Sarkar is Founder and Managing Partner, Proliferator Advisory and Consulting. He has worked across industries comprising FMCG, foods, industrial goods and financial services, and is author of several books on customer service, lean management and operational excellence.

**GHISLAIN TASCHINI**[in](#)

Ghislain Taschini is Senior Consultant at Renault-Nissan Consulting. He has extensive experience in the deployment of international and cross-functional improvement program and initiatives. He has worked in senior positions in the US, Asia and Europe.

**PAUL STONE**[in](#)

Paul Stone has more than 27 years' experience in the IT industry. A highly accomplished IT professional and go-to product expert, from both a business and technical perspective, Paul is Solution Architect at FlowForma, responsible for ensuring the successful on-boarding of partners and customers.

**SACHIN AHUJA**[in](#)

Sachin leads business change through program and project management. He has held senior roles at IBM, D+H and Telus, giving him extensive experience in process excellence, process transformation and change management.

2019 state of the industry survey

KEY LEARNINGS



- Top line growth is increasingly a measure of success for OPEX projects
- OPEX is seen as mission-critical, particularly with regards its role in attracting and retaining customers
- 'Linking process improvement with top-level business strategy' remains the top challenge
- There has been uncertainty around budgets, despite the expectation that the number of people within OPEX will grow
- Transformation is a product of culture

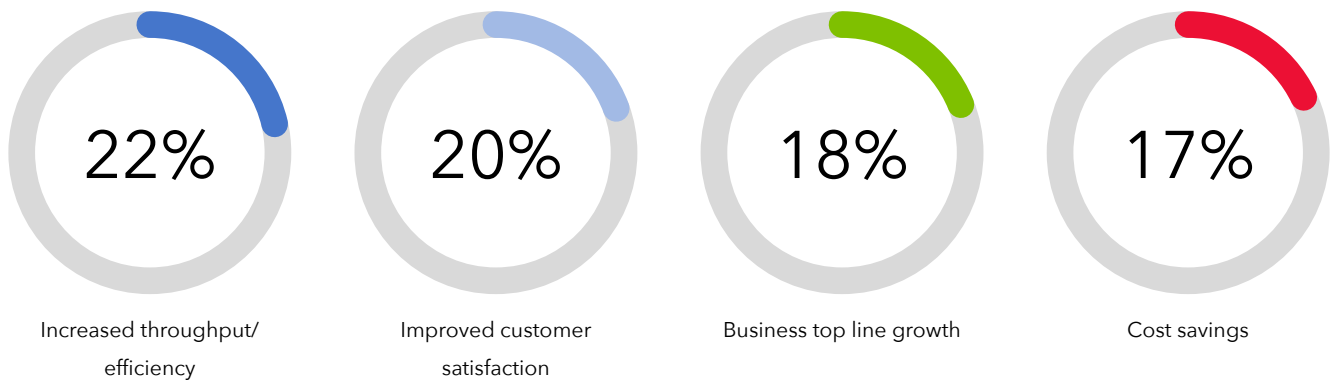
Top line growth

An ascending metric for success

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While 'increased throughput and efficiency' has long been the first place in our annual poll, 'business top line growth' is a newcomer to the top three – reflecting that projects have the potential to drive the fortunes of a company in a competitive market. Cost savings, in second place last year, is now in fourth place.

The primary measure of success for OPEX/transformation is:



A PEX specialist with a background in FMCG and financial services, [Debashis Sarkar](#) says that process is fundamental: "A solid operational excellence transformation will link the outcomes to key objectives of the firm."

Given that top line growth is seen as so important, it is notable that team sizes remain small. OPEX projects are expected to touch every part of an organization; as Debashis comments, they must "have a mechanism to drill down to actionable objectives even for the employees at the lowest level". The teams running them, however, are often small: **64 percent of the teams in OPEX and transformation projects are under 10 full-time employees (FTEs).**

[Paul Stone](#), Solutions Architect at FlowForma, says: "The low number of small-scale pilots suggests that they are short lived and success is measured on a grander scale: once value is demonstrated, the methodology is quickly accelerated to achieve enterprise goals."

[Samantha Bureau-Johnson](#), Vice President of Business Process Solutions at Blue Cross NC, remarks: "For an

organization that has 50,000 employees, 10 would feel like not enough people. But in a medium-size company of 5,000-10,000 employees, that's probably enough. It is about who's sponsoring it or where it sits in the C-suite, what is their mission to transform, and what is the burning platform. The higher up that team reports into, the more impact they can have."

The situation for many is that a small number of people are being trusted with powerful transformational tools, and [Ann Heron](#), Chief Strategy Officer at Pendo Systems, says: "Businesses should ask: what has been the most transformational software tool employed by your organization and why?"

The 'why', Samantha Bureau-Johnson believes, is culture: "A tool without the right cultural impetus is irrelevant. I've delivered multimillion dollar change without any tools at all; it's really about cultural alignment."

We will cover transformation and culture shortly, but first let's look at how the perception of OPEX within industries is changing.

II Function, reach and ownership

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Businesses are applying OPEX through their organization, although the bulk of interest is in customer-facing functions: **OPEX methodologies are being applied in customer service (41 percent), sales (32 percent) and call/customer contact center (27 percent).**

With high rankings for **supply chain (30 percent) and finance (28 percent)**, OPEX has a focus on serving existing customers, winning new business and delivering the primary functions of the back office.

If OPEX and business transformation are a key part of dealing with customers, the highest-ranked (35 percent) view of OPEX is that it is **'a mission-critical strategy to help the organization to drive growth, manage turnaround and deliver strategic objectives'.**

Debashis Sarkar warns against believing that customer-facing functions are the whole story, with OPEX described as **'a way to improve productivity and efficiency' by 24 percent of respondents, and 'a way to reduce operational cost or reducing headcount' by 11 percent.** "Cost-reduction still continues to be a major reason for operational excellence transformation in many industries," he says. "Only a **very few companies, 6 percent, are looking at OPEX to build a change-ready culture** which can change the operating system of a company for the better."

The shift towards 'mission critical' may be echoed in another movement in figures around CEO and COO ownership of OPEX.

This year, the CEO has overtaken the COO from second place. This means that either the CEO's role has changed to include process or that people with experience in operations have found a gateway into the CEO role. Debashis Sarkar says: "Clearly, this is good news for those who want to make a career in OPEX." CEO-turned-leadership, culture and transformation coach [René Carayol](#) warns that transformation is outside the comfort zone of many leaders, remarking: "Leaders and CEOs are brilliant

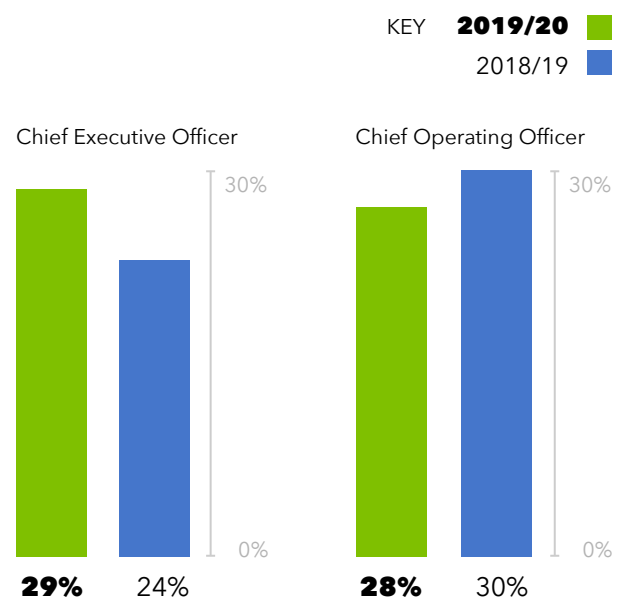
at incremental improvement. They don't want to become amateurs overnight."

PEX/OPEX programs have a wide spread of maturity levels. While there are **some businesses that have had formal programs in place long term (17 percent for between four and eight years; 11 percent for nine years or more), the bulk of these are novel (29 percent for between one and three years; 18 percent for less than a year).**

"OPEX programs are changing to be more strategic activating arms of your business," remarks Samantha Bureau-Johnson. "They're implementing agile transformation, they're helping the business with faster speed to market. They may not see themselves as OPEX programs, because they're more about digital transformation than just business excellence."

Therefore, for many businesses, formal programs are a new idea. As these programs mature, they will penetrate further into the organization, with figures showing a broad spread in the scope of deployment.

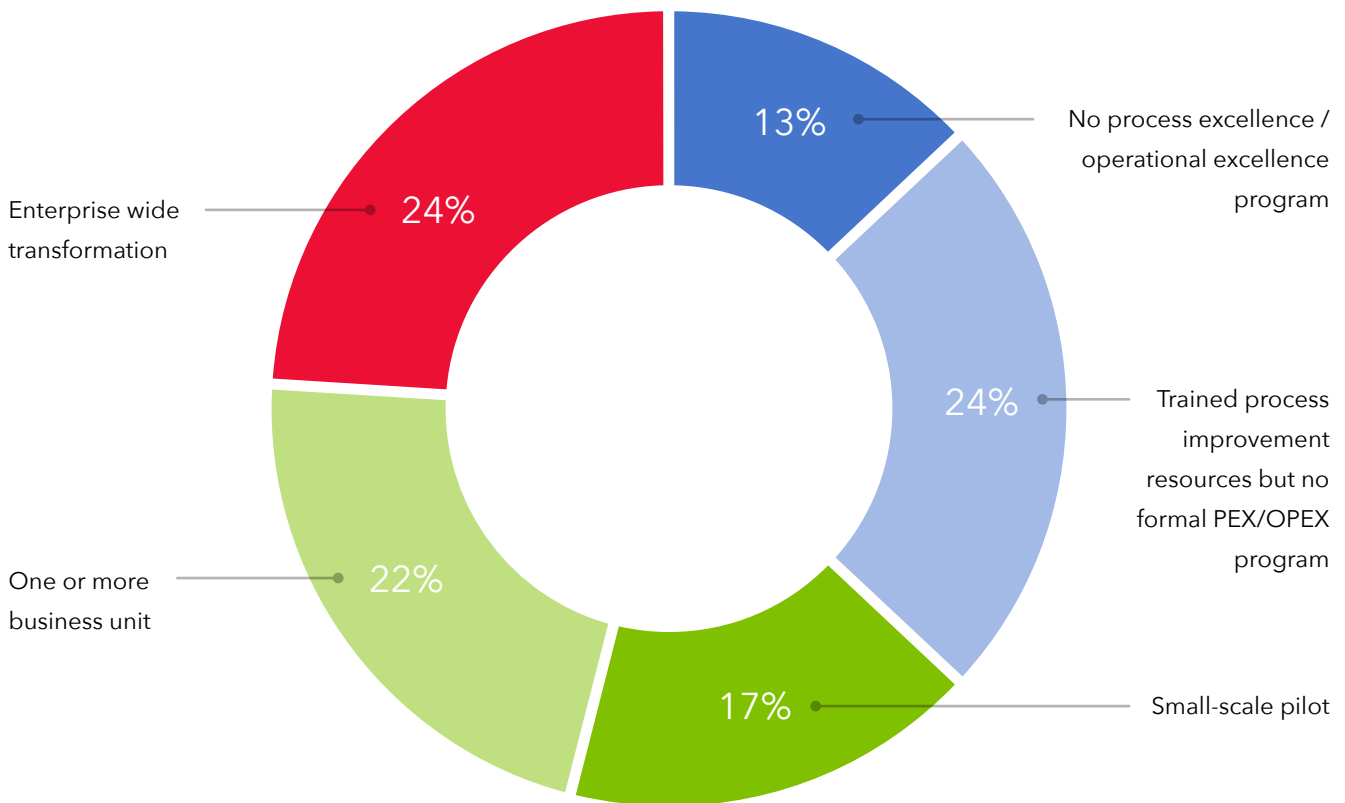
Who in your C-suite owns OPEX/transformation?



II Function, reach and ownership

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Which of the following best describes the current scope (in 2019) of the process excellence/operational excellence deployment at your company?



Given the multiple different PEX structures being utilized, Debashis Sarkar says that businesses are at risk if they allow their OPEX to be concentrated in one place.

"Probably the biggest challenge in any OPEX journey is: how does one build an operating system that endures for years to come and does not vanish with a change of leadership," he notes. In other words, a culture of excellence and improvement needs to endure even when the personnel changes.

Looking at the big picture, PEX tends to be led by small groups/individuals and is more stable when widely distributed through an organization's culture. Like any change, PEX requires champions to alter the mindset of an organization, but the results of effective programs will help the ideas spread into the rest of the business. The low number of small-scale pilots suggests that they are

short lived. Once value is demonstrated, the methodology is accelerated to become enterprise-wide, or businesses return to where they were before.

As Debashis Sarkar says: "This data clearly shows that OPEX transformation provides an opportunity to make companies better."

A large number of OPEX methodologies are available for leaders, with the top three favored by respondents being: **change management (57 percent), business process re-engineering (46 percent) and lean (45 percent).**

NOTE: organizations may be using more than one methodology - see graph for full details

Which methodologies and solutions are you currently using to support your operational excellence projects?



“You are still in the people business and technology doesn’t drive people. People drive technology.”

René Carayol

Leadership & Business Keynote Speaker

Sachin Ahuja, ACMP at McGill University and PEX Awards judge, says: “The approach to process excellence has been spread in all industries as different methodologies such as lean six sigma, total quality management. We believe the future will be digital which means it will be more important for industries to become pragmatic to focus on excellence.”

‘Change management’ is, as it was last year, at the top of the list. Samantha Bureau-Johnson notes: “No matter what business you’re in, you’re in a people business. The work that OPEX does has to be sustainable, and you sustain the

changes through people. You miss a lot of opportunities if you don’t get people to buy in and support the change. People will make or break a transformational effort.”

René Carayol agrees: “You are still in the people business and technology doesn’t drive people. People drive technology.”

The reality is that while automation has a part to play, the solutions supporting operational excellence projects emphasise the human parts of the business.

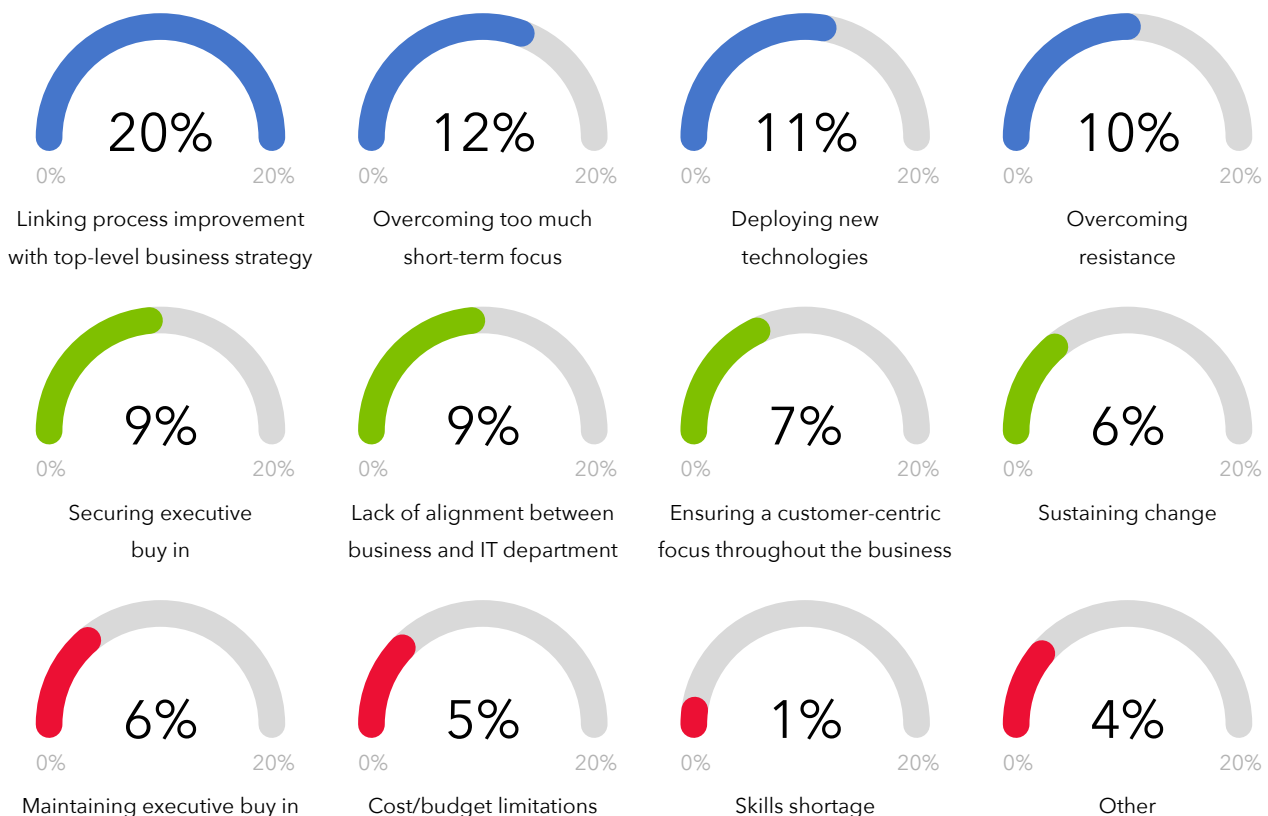
III

People continue to be the biggest challenge

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The challenges felt by OPEX practitioners tells us a lot about the mood of the industry. Top-ranked **'linking process improvement with top level business strategy' (20 percent)** speaks to the fact that OPEX leaders know they must support business strategy to remain relevant and isolated cost improvements are no longer enough to justify their existence.

What do you see as your primary OPEX and transformation challenge for the year ahead?



Ghislain Taschini, Senior Consultant at Renault-Nissan Consulting, says: "Whereas 'overcoming resistance' is normal, the accumulated figure for **'securing executive buy-in' and 'maintaining executive buy-in' responses (15 percent)** is a true concern. Could there be a correlation to the drop in the rankings of the 'sustaining change response' in the sense that before change can be sustained it first has to be accepted and nurtured at the highest level?"

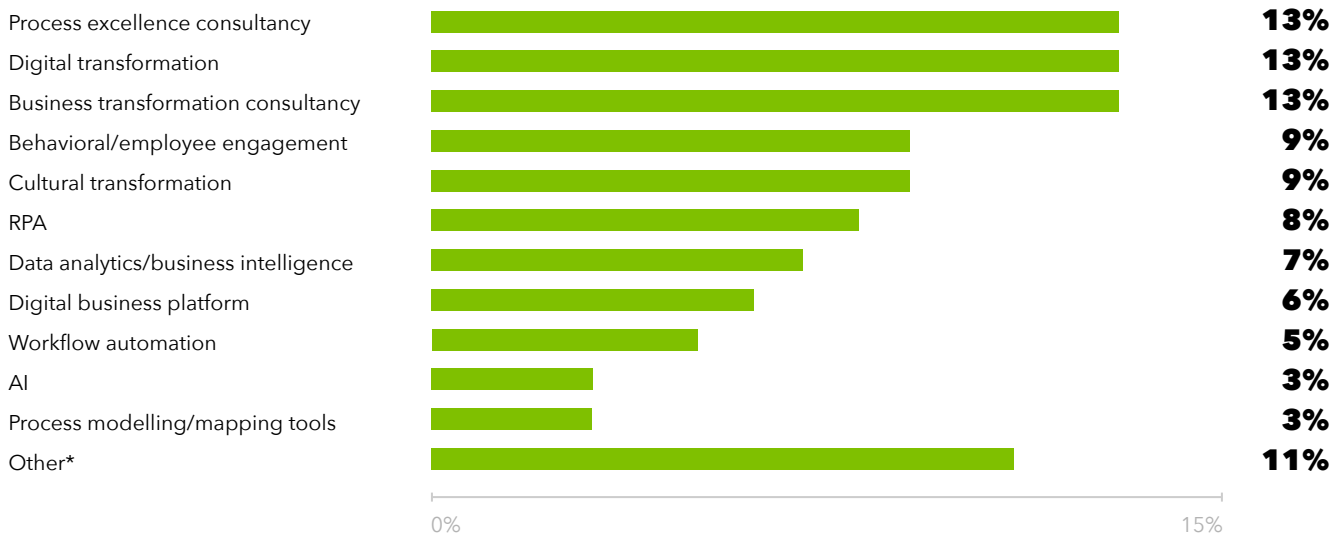
Samantha Bureau-Johnson adds: "If you're thinking about OPEX or process improvement as a tool kit, and you cannot translate that to speaking at the C-level on

strategy, you can't link it. If you don't have it linked, you're not going to be successful."

Ghislain Taschini sees a theme in the figures, noting that it is "interesting to sum up the totals for **'securing executive buy-in', 'maintaining executive buy-in', 'sustaining change response' and 'overcoming resistance': 31 percent**. The people and culture come first, far ahead of processes."

Ann Heron warns that there may be a gap of awareness, saying that there is little challenge to the status quo, with some people "not yet aware that unstructured data can be structured."

What solutions are you looking to invest in to drive your OPEX and transformation programs over the next 12 months?



* **Other responses include:** 'Developing business relationships with others'; 'Focus on organizational design to meet evolving partner needs' and a few responses echoing the sentiment: 'We don't know what to change.'

Picking up on this last point, Samantha Bureau-Johnson advises: "If you don't know what to change, hire an outside firm to help you on your strategy. Everything starts with what's your strategy? And where do you want to go? If you have no burning platform and you don't know how to compete, you need some external thought leadership to help reimagine the business."

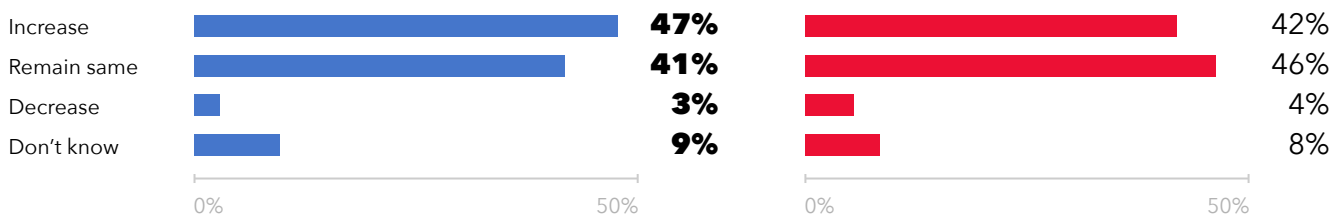
"The right methods will depend on the organization," says Paul Stone, who notes that an inclusive approach to process improvement is critical. "Making success

visible and selling the approach using proven results is key to widescale adoption and the achievement of corporate goals."

As a goal, digital transformation covers a lot of ground and may ultimately include some of the specific technologies that appear further down the list. OPEX itself remains in the remit of the human workers, with team sizes expected to grow or remain stable rather than shrink.

In the next year, the number of people employed full time in OPEX and transformation in your company is expected to:

KEY **2020** ■ **2019** ■



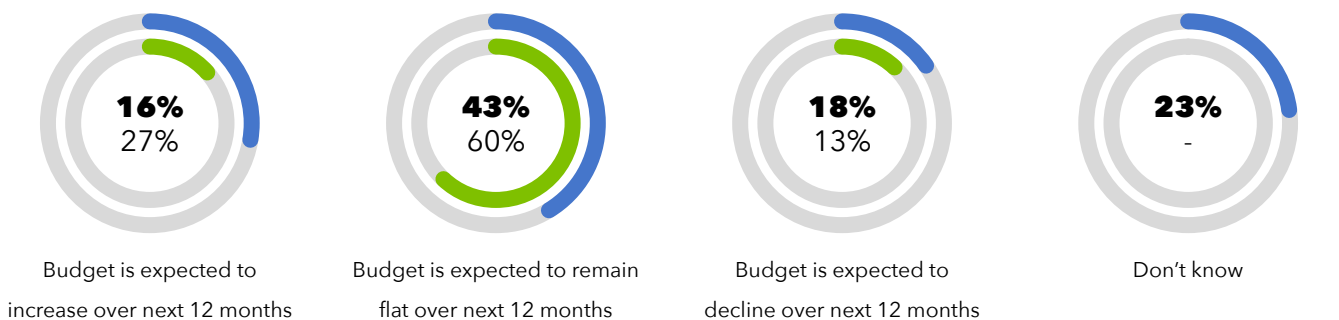
These figures show that there is slightly more optimism about engagement in PEX/OPEX projects with more people added to teams. Unlike other questions with a 'don't know' option, most respondents know what to expect in the coming months.

Budget uncertainty

The effects of the economy on OPEX budgets tells us whether attitudes are broadly in favor of investing in excellence, consolidating the gains already made or cutting costs. In previous years there has been a general expectation that budgets will stay on a level or grow, but respondents are expecting this to change: **while the majority (43 percent) of respondents expect budgets to remain flat, 18 percent anticipate a decline and only 16 percent expect an increase.** The volatility and uncertainty of the economy may be behind the **strong showing (23 percent) of the 'don't knows'** (an option unavailable in previous years).

Which statement describes the effect the economy is having on your OPEX program budget?

KEY **2019/20** ■
2018/19 ■

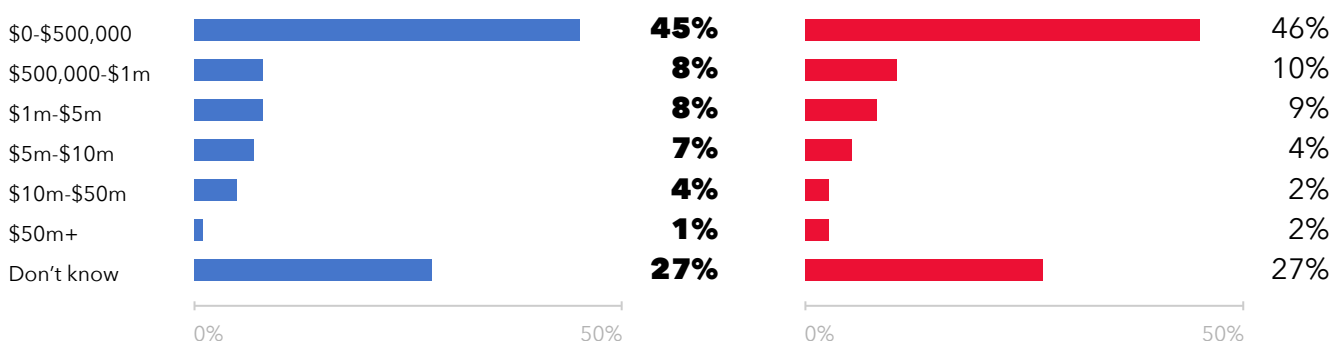


With OPEX team sizes expected to rise but no increase in funding, operational excellence initiatives may be pushed into the wider remit of the organization; the barrier between OPEX and the rest of the employees may be disappearing, with the expectation being that everyone has a role to play as part of whatever else they are also doing.

As with any business project, it is vital for OPEX to demonstrate a clear ROI to avoid slipping backwards. Comparing expected budgets for the coming year against expectations in the last year, we see **the majority of budgets in the lowest category.** The two sets of figures are similar, though there is **more tailing off as we get to the highest spends of all.**

What is the annual budget for investment in OPEX and transformation next year?

KEY **2019/20** ■
2018/19 ■



Samantha Bureau-Johnson notes that flat budgets aren't always a bad sign. "My budget has been flat for five years because I'm building capabilities into the organization," she says. "I don't need more people, I need to be training people on lean six sigma to do their own transformation. Businesses in that situation didn't need any more money. The biggest thing is to focus on the 'don't knows' - because they are the ones in trouble. They don't have commitment by knowing they will be invested in year after year."

v Looking ahead

Process improvement work in 2019/20 will focus on 'process redesign' (48 percent), 'creating a culture for transformation' (45 percent), 'developing leadership behavior' and 'change management strategy' (both 38 percent).

Other notable initiatives include a cluster of **RPA (34 percent)**, **process automation (32 percent)** and **agile transformation (29 percent)** – a significant showing for methodologies that have generated a lot of interest.

Toward the bottom of the table, **AI (15 percent)** and **process mining (9 percent)** are technologies that may be more niche or are yet to find a wider uptake. Pendo Systems' Ann Heron, says: "The low score for AI is astonishing and shows that folks are interested in incremental improvement vs. transformation."

Rene Carayol warns that transformation is the future:
 "In August 2019, HSBC lost its chief executive of 18 months. Incremental improvement was his mantra. Very cautious, very risk averse, very inward-looking, and not transformational. Compare it with First Direct, who changed the game 30 years ago; a bank without branches, at which everyone laughed. 24/7 telephone bank, everyone laughed. They started in a different place. They didn't take branches and try to incrementally improve. They got rid of branches. The challenge businesses have is most of the executives in the corporation are all incremental improvers."

Given that we see change management and change management strategy repeated throughout this report, with respondents placing a heavy emphasis on process, leadership and training, the immediate future for PEX is about negotiating cultural change, highlighted in the word cloud generated by our question:



Considering these strategies, Ghislain Taschini remarks, "It is surprising to see that customer centricity is hardly on the radar. We should probably all do some more benchmarking with Amazon's customer centric mindset and approach."

Looking to the next five years, it would seem humans are not entirely out of the picture.

What skills do you think will be most important in achieving business excellence over the next five years?



As well as technical skills, **the big winners here are 'leadership', 'change' and 'innovation'.** In the future, we will favor those with roles that cannot be automated, and agility, leadership and creativity are likely to come to the fore.

Samantha Bureau-Johnson says that the answer to this

question for her would combine hard and soft skills.

"Digital skills are important as people need to be able to use digital toolsets to enable process. You also have to be able to manage stakeholders, with communication and leadership skills. Be creative and entrepreneurial to reimagine businesses and help leaders reimagine how they're meeting their customers' needs."

Conclusion

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Uncertainty runs through the findings of the **2019 state of the industry survey**: uncertainty about future funding and the response to new technology, or where it will lead next. This is against a backdrop of asking a lot from OPEX programs: as ‘top line growth’ has entered the top three responses to the question on how projects measure their success, and using OPEX to attract and retain customers underpins the view that OPEX is ‘mission-critical’.

The top challenge for OPEX professionals around the world remains as ‘Linking process improvement with top level business strategy’. Businesses that know what they are doing (and why) at every level have a greater chance

of success. It is this penetration through the organization that will enable OPEX leaders to do more with less, in response to the limited optimism for growth of OPEX budgets, despite the expectation that the number of people within OPEX projects will grow.

Finally, whatever goals and expectations we have for 2020, transformation is here. Time and again, we have heard that transformation will be a product of culture, not tools. Commentators have repeatedly said that every business is a people business; and that for OPEX efforts to succeed, they must think beyond simply using the right tool. The tools need to be given to the right person, with the right training in the right culture.

“Be creative and entrepreneurial to reimagine businesses and help leaders reimagine how they’re meeting their customers’ needs.”



Samantha Bureau-Johnson

Blue Cross NC



Features

KEY LEARNINGS



- Change or become irrelevant
- Figure out what is essential and do what it takes to make it work
- Change comes from the top
- Innovation and learning comes more easily to new starters and outsiders
- Data is essential to understanding your processes
- Humans and technology must work together
- Upskilling people will make your business stronger
- Transformation and disruption are creating new opportunities, if you know where to look

A welcome from Cathy Gu

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Event Director of OPEX Week 2020

Dear Transformation Leaders and PEX Network Members

For 21 years, PEX Network has been the No. 1 place for 150,000+ global business transformation and OPEX leaders to gain critical insights on shifting trends and best practices in business transformation and operational excellence. From lean six sigma to design thinking and agile, BPMS to robotics and AI, process improvement to systems thinking and disruptive innovation and change management to diversity and transformational leadership, the scope and depth covered by us have been deep and wide.

As we celebrated our 20th anniversary last year, we are also staring into the immense level of change, opportunities (and challenges) brought by the new decade. It's time to revise and reset your new OPEX vision for 2020 and we are here to help you along the way. Last year 150+ speakers shared a loud and clear message at the OPEX Week stage that really hit home with our 700+ attendees: transformation is a must no matter which industry you are in, and it starts from the very top. Yet how to strategize, lead and ensure the success of your business and digital transformation remains elusive even for those who are most experienced. With 21 years of heritage and 150,000+ members behind us, the PEX Report has done extensive research into our communities to provide answers to these key questions:

? **GROWTH, TURNAROUND AND HOLISTIC TRANSFORMATION:**

What are the holistic approaches companies are using to drive strategic top-down transformation?

? **PROCESS TRANSFORMATION:**

What are the best practices to deliver breakthrough results through a combined array of methodologies including lean six sigma, agile and design thinking?

? **DIGITAL TRANSFORMATION:**

How do businesses deploy RPA, process mining, AI and other cutting-edge technologies to drive efficiency and intelligent operations?

? **CREATE A CULTURE FOR TRANSFORMATION:**

How many companies are driving that deeper DNA change and creating a culture for transformation to sustain?

? **INNOVATION AND BUSINESS AGILITY:**

How to reimagine the future of excellence through systems thinking, disruptive innovation, and organizational reinvention?

We hope you enjoy what we discover in this report. We also look forward to sharing more into these key themes at the **OPEX Week 2020: Business Transformation World Summit** and look forward to seeing you there.



CATHY GU

Event Director, OPEX Week 2020



General Ann Dunwoody

Lessons for leaders



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General **Ann Dunwoody** is the first woman in US military history to achieve the rank of four-star general. Dunwoody headed the largest global logistics command in US Army history, managing a budget of \$60bn. Her organization's motto: "If a soldier shoots it, drives it, flies it, wears it, communicates with it or eats it, Air Mobility Command provides it."

KEY LEARNINGS:



- › You can't manage the data unless you can see it
- › Share a clear vision
- › Good ideas have no rank
- › Ignoring mistakes sets a new (lower) standard
- › Change is the alternative to irrelevance
- › If the outcome is essential, work at it



PEX Network:

How does something you do in your office translate to something that's happening on the other side of the world?

Ann Dunwoody:

When we had our base realigned to Huntsville, Alabama, we got to build our own new headquarters. We were able to leverage technology that we didn't have in the past. Like FedEx's central operations center, we were able to get the technology to give us total asset visibility end to end, from the foxhole to the factory.

When you can see the organization's data, you can manage it. We now have worldwide video conferences which you could have regularly, so you can talk to personnel in Iraq, Afghanistan or California. In the past, we had leadership by walking around, but when you're managing 65,000 people globally, that's not realistic every day. Technology allows you to share visions, objectives and solve problems.

PEX Network:

Is sharing that clear vision important?

Ann Dunwoody:

One of the most important things senior leaders have to do is to have a vision, communicate the vision and make sure that everyone understands the vision. And you can't over communicate it, so you get buy in from

the subordinate. If you don't have buy in, that makes it very difficult.

Through participation, every person in that organization has to see how important he or she is in that vision. And when they see that, they come to work knowing that whether they're in the depot fixing a vehicle or they're a supervisor, or they're a commander, that what they do is important every day.

PEX Network:

The trend in business at the moment is to have quite flat hierarchies. How important is the voice of your newest recruits? People think of the military as being incredibly hierarchical.

Ann Dunwoody:

My philosophy is: good ideas have no rank. I certainly didn't have all the answers, even as a four-star general. You continuously learn every day, bring in people from all backgrounds and all walks of life. They're going to come and look at problems differently than you would. By engaging folks and getting their thoughts and their ideas, you're going to come up with a much better solution to very complex problems. You can do it through town halls, you can do it through small groups or you can do it through syncing sessions.

General Ann Dunwoody: Lessons for leaders

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PEX Network:

While we're thinking about new ideas, how do you implement a transformation in a military organization?

Ann Dunwoody:

I think it is very hard and culture is the hardest thing to change. The attitude is: we've always done it that way, so why would we change it? Sometimes there's a burning platform. One of the bosses I had said to me: "If you don't like change, you'll like irrelevance even less."

PEX Network:

How do you remain relevant?

Ann Dunwoody:

Through embracing new ideas, new technology, and becoming more efficient and more effective in being good stewards of our country's resources. The old way of not knowing where equipment was, couldn't be sustained. During Operation Desert Storm, we had containers stacked up and we didn't know what was in them. We returned more than 20,000 containers unopened. That's an expensive way to run a business. By getting the tools we needed to see and manage what we were shipping and where we're shipping it, it also

gave us the ability to manage it. If the weather was bad, you could divert it, just like FedEx or UPS does today. We had those tools in our operations center to move resources around based on needs and requirements.

PEX Network:

Do you think that one of the risks of transformation projects is that it's going to become more about panic and less about putting in place a good strategy for the future?

Ann Dunwoody:

You have to be able to communicate what the risk is of doing something and also the risk of not doing something. Not every good idea is worth the cost or the risk. We've been talking about getting these tools for the army since I was a second lieutenant back in 1975. During Desert Storm in 1990, we said we're going to do it as we said we would never have this happen again. Then we started Operation Iraqi Freedom and we still didn't have the tools we needed. And so the inefficiencies created by not being able to manage this huge enterprise was very costly. Informing the leadership who made the budget decisions, of the risk of not getting these tools, was very powerful.



General Ann Dunwoody: Lessons for leaders

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PEX Network:

You've said that a high performing organization is one that does routine things in an outstanding manner. Do you think sometimes businesses miss getting the basics right?

Ann Dunwoody:

High-performing outfits that I've been a part of or tried to develop was doing everything to a higher standard. I think businesses as well need to be on guard against the slippery slope when subcultures, within the larger culture, start forming because no one's enforcing the highest standards. You want to encourage and inspire everyone to maintain those standards; those that don't have to be dealt with and those that do should be rewarded.

PEX Network:

In other words, never walk by mistake or you just set a new lower standard. Which is very lean six sigma - which came first for you, the theory or the practice?

Ann Dunwoody:

Actually, my very first platoon sergeant, Sergeant First Class Wendell Bolan taught me not to ignore mistakes. And that is a lesson that has been with me throughout my entire career. Something simple, like not wearing your uniform properly to something more critical, like not maintaining your weapon to standard, could lead to a fatality in combat. could lead to a fatality. It doesn't always have to be a confrontation when you're making on-spot correction. But people know what the standard is, they know what you expect and then you have to live up to the standard yourself.

PEX Network:

You've been around lots of leaders in your time. Do they find it difficult to admit that they're less than invincible?

Ann Dunwoody:

I think that's part of our culture. We want to believe that everyone can do everything and anything, and we want them to believe they're invincible. But we are still human and we all have vulnerabilities. I keep a lookout for the subordinates when people aren't having a good day or they're different in their demeanor. Sometimes you can

find out something that's causing that change so you can help them, be able to talk about it and take care of it.

PEX Network:

You've previously said you're afraid of public speaking, but you're very happy to jump out of an airplane. How do we do the things that we're afraid of?

Ann Dunwoody:

I couldn't believe the army was going to teach and pay me to jump out of airplanes, so that was really cool to me. Public speaking caught me totally off guard. I said there's a choice, you can delegate to someone else or work hard on it and get better. I chose the latter because you can't survive without being able to communicate and talk in public. Therefore, I worked very, very hard at it.



General Ann Dunwoody will be keynote speaker at **OPEX Week 2020 in Orlando**



Leading process change with Brenton Harder



PEX AWARD
WINNER



PEX Community Contributor of the Year Award winner **Brenton Harder** is Head of Process Excellence at BNY Mellon. Brent has a truly global experience of Process Excellence, having worked across different industries on different continents.

KEY LEARNINGS:



- › Not everywhere can adopt new tech at the same pace
- › Process is important but data really matters
- › Look outside your own business for learning opportunities
- › Get the details right and the big picture will follow
- › Change must come from the top: leaders must own the change



PEX Network:

Having worked in process excellence around the world, how does the US compare with other countries for adopting technology?

Brenton Harder:

The US is a big place, and the rollout of innovation is not uniform. Some places in New York do everything on paper, while there small towns in South Carolina that are completely digital and wired for 5G.

Australia was one of these places where it felt like the banks were just constantly competing. But it's easier to do change with 23 million people in a homogenous way, as opposed to 8.5 million on Manhattan island alone.

Adoption is going to reflect the differences of the people, and the more variety you have, the longer it takes for the mass to move. Think about regions of Africa that just bypassed the copper wire or telephonics and went straight to mobile. Here, banking went straight to mobile, because it didn't have the infrastructure.

PEX Network:

Many OPEX professionals are having to get up to speed with AI and cognitive automation. What's been your experience?

Brenton Harder:

We started in the robotics space, which was one step back for every two or three forward. We learned a lot, and robotics three or four years ago was sold as a panacea. It was the future to everything.

What we find, especially in the services industry, is it's not about the bot in a particular process implemented in a surgical way. It's about the data: if it doesn't run in a linear fashion, if it's not structured, or if it's not clean, then the robot is just a software program, and it falls over. What started as a robotic process automation journey became a data journey. And my epiphany after the last three years, being a process guy, is that it's not about the process anymore, it's about the data and the way the data flows through the process. The process is still important, but it's the data that really matters.

Leading process change with Brenton Harder

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PEX Network:

If other PEX leaders are finding this, that explains why process mining has come to the fore this year.

Brenton Harder:

With process mining you're going to need a good database or data source, otherwise it becomes very difficult. There's still an elemental requirement to understand what you do from a digital sense, to feed the data mining and the workplace analytic softwares that are the next real leaps in efficiencies.

Data is a challenge because when you get too far ahead, like where I think robotics did a few years ago, it sold a dream, and the dream didn't come to fruition. As a matter of fact, I think the lessons were learned elsewhere than actually in robotics.

During the 1950s, the US Air Force introduced a Naval Aviation Training Operation Procedure Standardization. It was the study of the actions or reactions a pilot would take in the cockpit. The Class A mishaps, which is loss of airplane or loss of life, plummeted because of the focus on continuous process improvements: plan, do, check, act.

PEX Network:

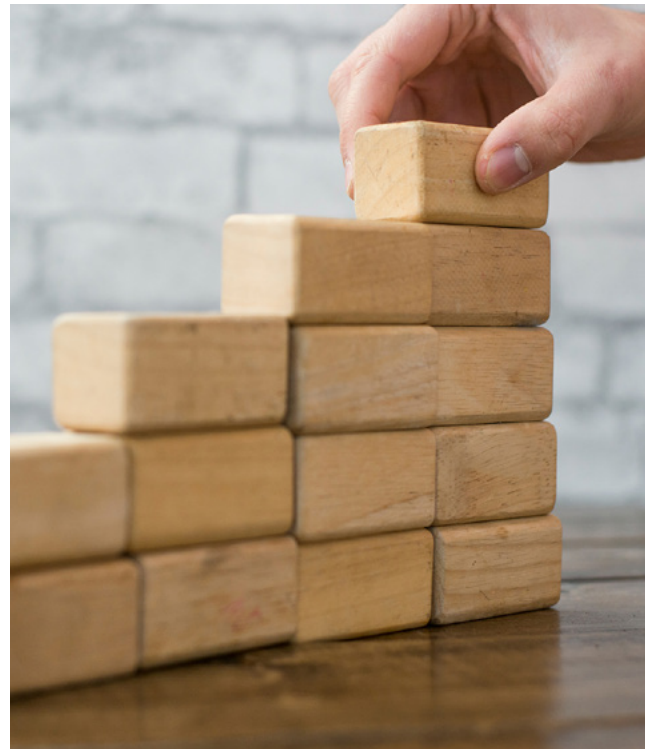
What could we do that makes it one percent better?

Brenton Harder:

Translate that idea into business. PEX team leaders feel empowered to make continuous process improvement, but the problem is while you're improving what you do piece by piece, it's very difficult to prove that at the corporate level.

What we did at the Commonwealth Bank in Australia is look at our cost-to-income ratio, and four years later it was one percent lower.

While you can't scientifically tie one effort with another when taken together, we just got better at what we were doing. We got faster, smarter and cheaper. So the four productivity habit program was attributed to millions in savings, because it focused on the small everyday things.



Where I'm making the most money and making the most headway is in these incremental improvements. It's going back again to the simple everyday changes that are happening.

PEX Network:

Do process changes start on the ground or do they come from the top?

Brenton Harder:

The biggest problem I've had is that processes don't change because you tell them to change. There needs to be the desire to change.

A fundamental change requires the CEO to do it. To go back to Commonwealth Bank, over that four years we moved mountains one bit at a time. Every time the CEO moved his lips, he talked about productivity. Every time he went to a branch, he started talking about the change metrics. And it was his initiative.

That to me has been the hardest aspect of being a PEX leader: really owning the change, or the need for change, and the way in which we're changing.

What will the next 12 months look like in OPEX?

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Adam Muspratt, Assistant Editor, PEX Network



KEY LEARNINGS:



- › Technology having a major impact on OPEX
- › Business goals include having humans collaborate with intelligent machines
- › Technology has potential to provide visibility and break down silos
- › Huge potential for OPEX projects to guide strategy

Our survey respondents have told us that the next 12 months in OPEX are going to be about change: while frameworks such as lean and six sigma have been immensely helpful in opening the doors to more efficient processes, OPEX has already been moving in a new direction.

We've pulled some responses together from our open question on the PEX survey, in which we asked respondents to tell us what they think the next 12 months will look like in OPEX. Collectively, we were able to identify three themes throughout these answers:

- 1 *Is the traditional approach to OPEX changing?*
- 2 *What solutions are PEX professionals asking for?*
- 3 *Impact: what will be the outcome of these changes?*

We've anonymized the data, but provide sector and company size for context.

Is the traditional approach to OPEX changing?

Many of our respondents feel that technology approaches and digitization are no longer in the educational stages, and companies will rapidly introduce technology-based approaches in the coming years, overtaking older methodologies.

"Operational excellence will be replaced by technology excellence, processes as we know will disappear."

Business/consulting services - 10,000+ FTE

"OPEX will no longer exist and we will only talk of TOTEX."

Utility company - 5,000-10,000 FTE

"Traditional approaches to lean six sigma will no longer exist."

Technology, telco, media - 10,000+ FTE

"Traditional methodologies will be left behind and a new revolution of industry 4.0 blockchain and AI will take over. Data science and modelling will become predominant. Core statistics will be the key differentiating factor. *Lean and six sigma methodologies are dead.*"

Financial services and insurance - 5,001-10,000 FTE

What will the next 12 months look like in OPEX?

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What solutions are PEX professionals asking for?

People want automation solutions that enable the human worker to be more human in what they're doing. Organizations have the long-term goal of having humans collaborate with intelligent machines.

"Leaders will focus on improving culture in order to create a competitive advantage."
Manufacturing - 10,000+ FTE

"Alignment with automaton is key."
Business/consulting services - 10,000+ FTE

"Technology solutions will be proliferated among the workforce and put into the hands of people who will be able to have more of a say in what problems need to be fixed - and how. This will ensure ease of use and mean that solutions will require less formal and lengthy training."
Financial services and insurance - 1,001-5,000 FTE

"New methodology will better integrate people with the right tool set."
Pharma, biotech and healthcare - 101-1,000 FTE

"For businesses to survive the digital revolution, OPEX, culture, flexibility and transparency must take precedence for any business."
Manufacturing - 100-1,000 FTE

Impact: what will be the outcome of these changes?

Respondents were optimistic about the potential of OPEX projects, predicting significant benefits to their business as a result of their OPEX efforts.

"Specifically, our OPEX will lead us to leveraging power within North America and prepare us for global expansion."
Technology solution provider - 1-100 FTE

"Increased portfolio across diverse clients."
Business/consulting services - 10,000+ FTE

"Development of connected enterprises sharing knowledge."
Technology solution provider - 5,001-10,000 FTE

What will the next 12 months look like in OPEX?

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"Broader toolkits for practitioners will be needed; specialization will be seen as a detriment."

**Financial services and insurance -
5001-10,000 FTE**

"It will become institutionalized and no longer a program or project."

Manufacturing - 101-1,000 FTE

It may be necessary to let go of some old ways of working to deliver on this promise; but as these responses show, OPEX plays an integral part in realizing a broad range of strategic outcomes.

"OPEX offices will discover the hidden value trapped in unstructured data and utilize powerful technologies to operationalize and monetize these data."

ANN HERON

Chief Strategy Officer, Pendo Systems

"For businesses to survive the digital revolution, OPEX, culture, flexibility and transparency must take precedence for any business."

GHISLAIN TASCHINI

**Senior Consultant,
Renault-Nissan Consulting**

Conclusion

There is a high expectation that people and technology will work together ever more closely. As the barriers to collaboration come down, bots are able to take over more mundane tasks and the potential of this new way of working becomes realized.



Trends and solutions in RPA and BPM

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Adam Muspratt, Assistant Editor, PEX Network



KEY LEARNINGS:



- › AI and machine learning will enable streamlined processes
- › Machine learning will augment decision-making capabilities
- › New sectors will embrace RPA in 2020
- › BPM will evolve for ease of use and maturity of artificial intelligence (AI)
- › Improved ability to analyze historical data and predict the future
- › Bots' ability to mimic human decision-making is becoming increasingly realized



Robotic process automation (RPA) is a highly effective way of automating repetitive business processes in support of digital transformation.

Giants including AT&T, Deutsche Bank and Walgreens are finding value in RPA, investing in the technology to drive efficiencies. This investment will make the sector worth an estimated \$4.9bn in 2020.

Technology advancements have taken RPA beyond backend office tasks with expanded capabilities, including the ability to analyze increasingly unstructured data. We asked RPA experts, vendors and customers where they think RPA will go next.

New technologies and how they will affect businesses

Low-code RPA gathers steam

RPA's codified rule-based programming, which ultimately results in major implementation costs, is coming to an end. The innate simplicity of low-code drag-and-drop user interface substantially reduces the time to set up automations. Enterprises no longer need to go through lengthy and expensive training cycles, hire outside consultants and developers, or suffer through

debugging phases. Instead, a wider range of employees can contribute to the development and delivery of process improvement.

Increased deployment of RPA in new sectors

Usage of RPA is relatively constrained to finance, insurance, utilities, human resources and customer service. Over the next year, proliferation of RPA will continue as other sectors realize the benefits of the technology.

There is strategic scope for RPA in sectors still characterized by large workforces, and overreliance on paperwork and manual processes. Applying RPA to these rule-based processes allows companies to monitor their operations from all angles and intervene where necessary, resulting in cost reductions and efficiency gains.

Increased usage in data analytics

By combining RPA with data analytics technologies, businesses are able to visualize and identify areas of improvement in processes, enabling a deeper understanding of organizational structure. By adding a layer of analytics to RPA, process leaders can validate process changes.

Trends and solutions in RPA and BPM

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While traditional methods of analyzing businesses process risk being subjective in comparison, data analytics technologies reveal what is performing smoothly and where the bottlenecks are, enabling the ability to address weaker processes directly.



Democratization of RPA will start the journey on becoming a commodity product

True commoditization of RPA will not happen in the next year, but what we will see is a change in mindset. Use cases will drive initiatives to ensure every employee has access to a robot for process automation. As the value proposition of not restricting RPA to a center of excellence becomes increasingly clear, the vision of 'a bot for every worker' will start to become a reality over the next year.

Growing incorporation of AI and machine learning

RPA can only complete tasks that a human has configured it for; AI is the next step.

Antony Walker, Productivity Aata Analytics and Automation Lead at Bank of America Merrill Lynch, says

that artificial intelligence (IA) is starting to mature: "Over the next year, there will be a lot more focus on AI. In 18 months to two years, I don't see there being any pure RPA initiatives, everything will have that intelligence built in."

Combining RPA with AI will open the door to capabilities such as image and pattern recognition, natural language voice integration and the ability to make sense of unstructured data.

For example, a solution that combines AI and RPA to automate high-volume customer emails will dramatically shorten email processing times, while improving the overall customer experience. Additional areas in which RPA will help business include IoT sensors and predictive analytics, text analytics and chatbots for self-service.

Incorporation of cloud technologies and agile process automation

Cloud-based services have practically become the standard as information and processes must be shared across departments and silos, while also reducing the burden on IT infrastructure.

The combination of RPA and cloud servers means that software robots can facilitate resource sharing and process optimization on a greater scale. Dubbed 'agile process automation' (APA), this new approach combines software robots, the cloud, data analytics and machine learning. APA can both improve business processes and deliver valuable business benefits. These benefits typically include improvements in speed, quality and compliance. Much like low-code RPA, the software-as-a-service (SaaS) or RPA as a service (RPAaaS) nature of these solutions means that the robots can get to work fast, increasing the level of involvement that OPEX practitioners can expect without requiring programming knowledge.

What opportunities will arise and what problems will be solved?

The trends in 2020 will iteratively improve on the existing formula through increased functionalities and increased proliferation. The biggest change will come in the form

Trends and solutions in RPA and BPM

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of AI and machine learning, which will assist project managers in allocating resources and streamlining processes. Meanwhile, machine learning will augment decision-making capabilities which is not possible with non-AI RPA solutions.

Finally, new sectors will embrace RPA in 2020. Automating redundant tasks will become a priority for organizations and technology will be put in the hands of more people who will be able to build their own solutions with less formal training.

Upcoming BPM developments in the next 12 months

New technologies continue to be the driving force behind the growth of the BPM sector, as new simplified software and tools are offering organizations across industries an opportunity to stay ahead of the curve for continued growth.

New technologies and how they will affect businesses

Low-code BPM

Like Low-code RPA, the ability to create fully working automated processes straight out of the box, and without the lengthy and expensive coding process, has huge appeal for businesses. Low-code BPM solutions are generally highly customizable to suit different needs. In 2020, BPM vendors will likely focus on low-code solutions which will eventually become the standard.

Increased collaboration

With the rise of chat and data sharing applications, businesses are one step closer to removing silos. Chat messages are instant and archived, and existing systems may be augmented with value-additions such as process alerts, data integration and document sharing.

Case management is also becoming intrinsic to BPM. Solutions providers will continue to offer the ability to manage dynamic unstructured processes, and users can program the software down the path that will offer the best outcome based on likelihood.



Maturity of chatbots

We expect that chatbots will become an integral part of many processes, as they enable 24/7 service and near-instantaneous responses to customer queries. Human intervention is still required, however, as more complex enquiries may exceed the scope of the bots' programming.

Analytics will continue to be critical

The market for analytics is considered by many to be the next generation of BPM – intelligent business process management (iBPM). Indeed, if digital transformation is fundamentally about process improvement, iBPM is the solution for addressing business needs and assessing the full-spectrum impact of those changes for tomorrow.

What opportunities will arise and what problems will be solved?

As is the case with RPA, the evolution of BPM remains continuous in response to emerging business needs and new technologies – predominantly the need for ease of use and maturity of AI. The ability for an enterprise to analyze historical data sets and create a probabilistic approach to predict the future will be most the transformative element of BPM in upcoming years as the ability to mimic human decision-making – and potentially surpass it – becomes increasingly realized.

PEX's training gap

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Technology's impact on OPEX is hard to overstate. The industry is in an arms race for software that is designed to give businesses an edge over the competition and deliver significant ROI.

RPA has captured the imagination of the business community, but early rapid uptake has faltered when it comes to scaling. RPA's scaling paradox, some experts say, could be resolved with additional training to ensure that users have the right skills and knowledge to start projects with a view to expansion. We talked to two experts on training the workforce in the new technology.



Daniel C. Morris, CBPP, CBL, CBA, is Principal at My Career Transformation, a BPM and business architecture on-line learning organization.



Edward Brooks is founder of the **Beacons**, an e-learning business specializing in technology courses.

KEY LEARNINGS:



- › Training needs to go beyond how to use the tools
- › Be realistic about your project's scope - and funding
- › Honesty is priceless
- › Jobs may disappear but people won't
- › Business projects are enabled by tech - not the other way round

PEX Network:

What is the relationship between project failure and inadequate training?

Dan Morris:

My experiences with multiple clients points to a high percentage of process improvement and IT project failures - projects coming in over time, over budget or delivering less than expected.

The culprit behind the high rate of project failures: improper and insufficient training and experience. Projects using BPM/BPMS and RPA require a blending of business and IT at a greater level than in the past. This normally requires a formal training program and the development of experience in smaller projects. I



have seen a company buy a BPMS or RPA tool and then simply cobble it into the current undesigned technology infrastructure. This carries all the problems of the legacy operation forward into the use of the new technology.

Edward Brooks:

Training does take time, so the sooner you start, the sooner you'll get to scale, regardless of the bumps along the way. The answer is always around expectations. Somewhere along the way, the market was told that the new tools were easy, simple, fast and cheap. Yes, the new tools are easier, simpler, faster and cheaper than most other impactful technologies, but that's not difficult to achieve.

PEX's training gap

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PEX Network:

Where can training add the most value for process professionals?

Dan Morris:

Training should talk about what people are experiencing and look at why that is happening. Discussions that help people understand how to do things and help them get out of pits that inexperience or a lack of knowledge has put them in.

Improper training often allows people to go down dead ends and then get stuck. Discussions on what they are doing lead to these “a-ha” moments when people see where they went wrong. Although interfacing can be an issue, this is not so much a tech issue as it is an issue with the team not understanding how to redesign a process, how to find and model rules and decisions, and how to improve performance in the operation.

Edward Brooks:

During training, online or onsite, everyone is thinking about how this will apply in their organization. They are predicting the issues they will face, which processes will work best, what the security issues will be and office

politics. Then, with live online or onsite training, they have the chance to dig deeper. These are issues for anyone and nothing is confidential, so they are comfortable raising these issues.

PEX Network:

When should businesses think about reskilling their people?

Dan Morris:

Right now is a good time to start. BPM, BPMS, RPA, AI are all here to stay. They will clearly evolve and become much more capable, so skill refresh will always be needed. This timing is appropriate, even if you do not want to deal with large-scale improvement or change. Start with BPM and have the team learn how to approach these projects the right way, how to model, analyze business performance and redesign the operation. Let them work on small projects where the mistakes can be easily corrected. Keep adding to their skills and competency level within those skills through additional training and experience. The Association of Business Process Management Professionals (ABPMP) is a good place to identify the BPM skills you will need. It is also a good place to keep adding to your knowledge through its monthly webinar series.



PEX's training gap

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Edward Brooks:

It is natural for jobs to evolve and sometimes disappear. Workforces will not disappear. They will gain new skills and new ways to apply their talents. It is happening already.

Cities such as Sydney and Toronto have had 20 years of economic growth and there are huge skills shortages, so employers are fighting a battle to keep their people. Add to that all the new technologies, and they require people with the skills to implement and run them. But the nature of work is changing, so it is a great value proposition to tell your employees that you will be reskilling them. That reskilling will be perpetual. And it will be in small steps, not massive leaps.

Dan Morris:

PEX has an opportunity to move into this space and help companies create a comprehensive approach to attaining operations excellence and then, even more importantly, maintaining it. I would hope to see a formal, up-to-date, point of view from PEX and an expansion of education opportunities.

PEX Network:

Many businesses struggle with scaling RPA - why do you think this is?

Edward Brooks:

Scaling RPA is probably the biggest problem in the industry right now. Most organizations don't invest actively in telling their people how powerful RPA is. 'Secondly, organizations do the proof-of-concept; then they stop to plan the next phase; then they stop to get the funding to roll it out at scale. These 'plateaus' can lose an organization 18 months or more of time and value. Finally, training: this all needs internal skills and continued access to knowledge that will allow you to develop deeper skills. Scarcity here will become the bottleneck.

Dan Morris:

The RPA vendor provides basic training to the IT staff and the end user in the use of the tools and turns students loose as trained experts in the use of the tools. Taking

a course, however, does not make anyone an expert in anything. Years of combined training, experience and creative self-performance evaluation make an expert - nothing less really achieves that goal.

PEX Network:

What can business leaders do to make RPA scaling a reality?

Edward Brooks:

Plan ahead, because RPA is here and your job is to make it happen, at scale, sooner. This gets you to the initial value in terms of efficient operations, strong employee value propositions and momentum.

Dan Morris:

A great many people involved in the use of new technologies and BPM do not have formal redesign training or broad-based business transformation experience. A long-term staff investment strategy is really a strategic commitment to the future of the company. It takes time and money to invest in solid training and ongoing skill development programs.

Launching any successful project requires a team that you can count on. The chance of a successful design and implementation is multiplied when your people are equipped with the skills to contribute and drive desired outcomes.



Process mining

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Giving the edge to RPA

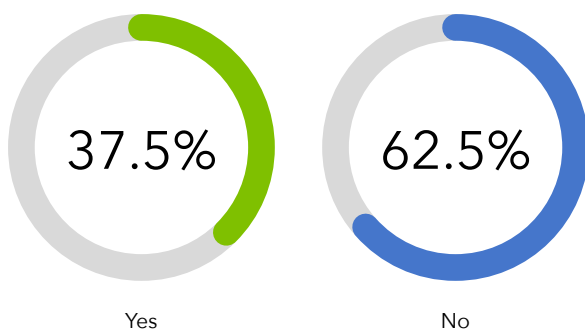
Wil van der Aalst, Distinguished Humboldt Professor at RWTH Aachen University and Fraunhofer Institute for Applied Information Technology, discusses why now is the best time to investigate the technique he has pioneered for 20 years.

KEY LEARNINGS:

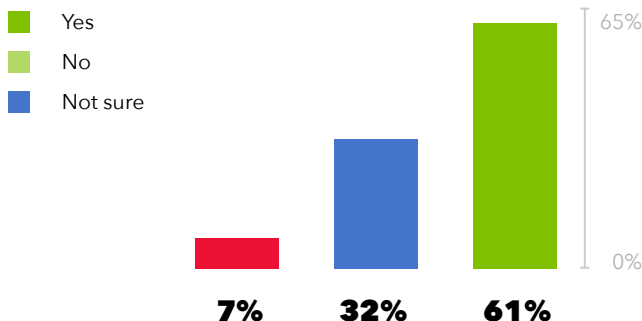
- › Not everywhere can adopt new tech at the same pace
- › Process is important but data really matters

Just before our online event, Process Mining Live 2019, PEX Network ran a poll to ask:

Are you currently using process mining?



Are you going to be using process mining in the next 6-18 months?

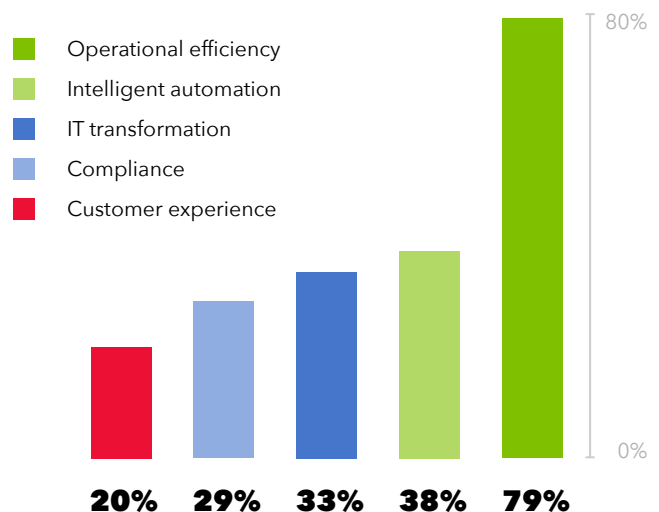


We wanted to know why the approach, which has been around for 20 years, is suddenly exploding in popularity, and what benefits PEX professionals are getting from it.

PEX Network talked to Wil van der Aalst, who has been called 'the father of process mining', has pioneered the technology, to ask why he thought it had taken so long to break into the mainstream.

Wil van der Aalst told us: "Process mining entails data science, big data and the continuous desire to improve processes. However, you also have to realize that the algorithms in the background have improved over the last 20 years." Another answer comes from the polls conducted throughout Process Mining Live:

What is the main driver behind process mining in your company?



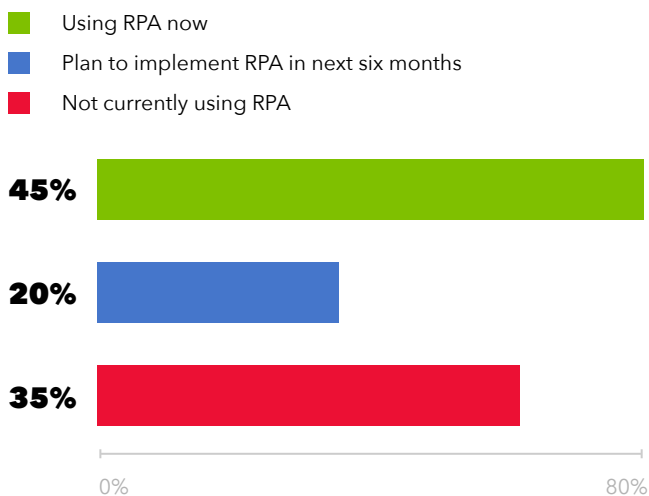
Operational efficiency is the front runner, but we shouldn't be surprised as that has always been the big promise of process mining. In second place, intelligent automation may offer a clue to what's really going on: as businesses begin to adopt smart technology, there is a need to investigate processes that before had been left untouched. In short, process mining enables businesses to go beyond looking at making their processes better according to the criteria set by human workers, and start

Process mining: Giving the edge to RPA

understanding how to streamline processes for robots. Process mining is a lens through which to see how an organization operates more clearly than you can with the naked eye, and apply efficiency methodology accordingly to a workforce able to make even small changes meaningfully profitable. Professor van der Aalst agreed with this analysis, adding: "On the other hand, process mining is so obvious in so many domains that it is surprising that not more people know of it."

Is there any evidence that robots are driving the uptake of process mining? In Process Mining Live we also asked attendees:

Are you using RPA - or planning to implement it in the next six months?



Note how similar the number of organizations using or planning to use RPA is to the uptake of process mining in our original survey. This should not be surprising as process mining analysis reveals the best processes for RPA FTE savings. One [case study highlighted by PEX Network](#) showed how the savings added up for Texas Life Insurance Company: billing (19 percent), case implementation (34.5 percent) and customer service (30 percent).

Process mining is a key tool for anyone trying to work out which jobs are ideal for robots, and which are best left to

people - which as more businesses adopt automation is an important strategic decision.

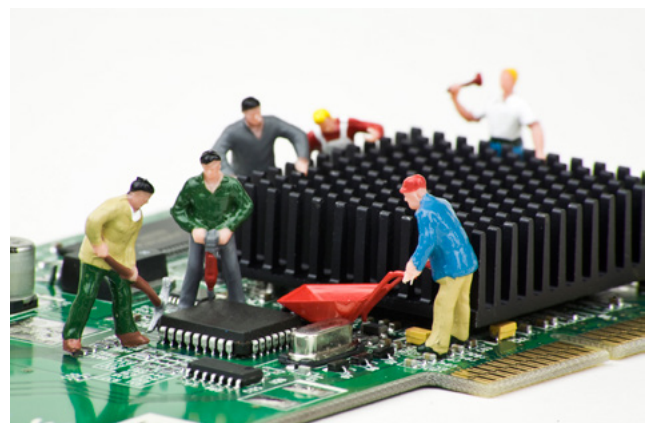
So what's next for process mining? We asked Professor van der Aalst where he thinks the technology will be in the next few years.

Wil van der Aalst:

The field is becoming more mature. Before, the focus was very much on process discovery. I think the next step is that more advanced functionalities will become more important. A Gartner report from the end of 2018 revealed that there is an increased focus on conformance checking. We're not so much interested in analyzing what is the process now. You know what you want the process to be, and you want to understand why the process does not run how you expect it to run.

IN THE NEAR FUTURE WE CAN THEREFORE EXPECT:

- Businesses that use RPA to find added value in process mining
- Process mining to become part of the planning stages for RPA projects
- In regulated industries, process mining will be an essential tool to ensure businesses remain compliant



Look outside to innovate within

René Carayol on agility, transformation and teams



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René Carayol is a leading business expert specializing in transformational change, culture and leadership. He has been a visiting professor at the Cass Business School, a broadcaster and a board member of companies including Pepsi, Barclays and IPC Media. Carayol has served as an advisor to the CBI, McKinsey and PA Consulting.

KEY LEARNINGS:



- › Look outside your industry for bright ideas
- › Businesses don't thrive on incremental changes
- › Experience is becoming overrated
- › Embrace recent joiners in the organization
- › The best person for the job is the best person for the team



PEX Network:

How important do you think agility is?

René Carayol:

It's easily talked about, much harder to practice. I think that there is not a business we've worked with the last 18 months that hasn't had agility as part of the mantra. Unfortunately, it's only a mantra. A totally agile business is Dutch banking giant, ING Group. The chief executive, Ralph Hamers, took over in the aftermath of the 2011 financial crisis. At the time, Ralph was running a wholly owned subsidiary of ING bank in Romania. ING decided the the new business environment needed a new agility, so they skipped a generation. He was elevated to Group Chief Executive and he put agility at the heart of everything they do. They visited TomTom, a technology company, to identify cultural values that he wanted to infiltrate into an old, hierarchical bank. It took them five years to transform into agility. Now the whole bank runs under agile and if you really want to see agile in action and see what the benefits are, you've got to look at ING.

PEX Network:

How does agility feed into businesses adopting new technology?

René Carayol:

Historically, technology was always about incremental improvement, doing what we do but a little faster, a little cheaper and a little more accurately. The old method of working is too expensive. It's too slow, complex and cumbersome.

If you truly want to be agile and benefit from a digital world, you need to start in a different place, and I can give you an example of this.

Look outside to innovate within

HSBC and First Direct. HSBC just lost their Chief Executive of 18 months. Incremental improvement was his mantra. He was very cautious, very risk averse and inward-looking. And not transformational. Compare First Direct. They changed the game 30 years ago, a bank without branches, and everyone laughed. A 24/7 telephone bank, at which everyone laughed. They started in a different place.

PEX Network:

Are companies in a good place to take advantage of the opportunities offered by new technology?

René Carayol:

We've got to change the game. The great example is you can have an estate with 1,500 branches. That's a heavy, heavy pull on your balance sheet and your capital program. ASOS and Amazon have come to the game without any stores, landlords and rates to pay. That's agile.

PEX Network:

Are CEOs the best people to lead transformation?

René Carayol:

Organizations and leaders and CEOs are brilliant at incremental improvement. They don't want to become amateurs overnight. The challenge we have is most of the executives in the corporation are incremental improvers.

PEX Network:

Does this mean a transforming company has to change their CEO?

René Carayol:

Experience is becoming overrated. Those on the top are still vital to the organization because they bring wisdom, corporate memory and stewardship. But I think that where the support will come from is at the other end of the organization, the most recent joiners, who aren't vested in the history or the heritage. And they're already agile and they're technology literate.

What's the fastest growing company in the world today? TikTok. How many people at the top of the organization

know anything about TikTok? Let me save you the effort. None.

One of my friends runs a digital transformation organization. He's got his 13 year old son to come in and make a 20 minute presentation to his board of directors on TikTok. Why him? Because he's the only practitioner he could find.

PEX Network:

This means that we really need to create a culture of transformation.

René Carayol:

Yes. Don't let those most recent joiners in the organization feel as though they're bottom of the food chain. The trick for the chief executive is to become more steward than boss and ensure every voice is heard with equal weight.

Tomorrow's method of working is treating new joiners with credibility, creating an environment of psychological safety, so they can feel their voice is heard; it will be received, recognized and make a difference. What is it about TikTok that we can learn from? What you don't want people saying is: "What the hell is TikTok?"

PEX Network:

What can leaders do really quickly if they want to make a big change in their culture?

René Carayol:

Hire on attitude and behavior less than skills. If there's a skill shortfall, we can train that. At the moment we're far too obsessed with the skill set. Think about attitude, courage, the ability to take risks, and don't be afraid to do things differently.

Also, we are still obsessed with the best person for the job. Let's think about the best person for the team. Understand what the team may be lacking, otherwise, we risk bringing in experts who create silos.

Let's hire team players. Quote Rudyard Kipling at your peril, but I'll give it a go: *"The strength of the Wolf is the pack. The strength of the pack is the Wolf."*

Three learnings for automation success

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Jorge Ruiz is Product Marketing Manager, RPA and AI solutions for Automation Anywhere.

Listening to the market is a critical part of my job. In a software company, there are always plenty of product experts, but there's usually a lack of market experts. My three top takeaways are what I have learned from customers who have been able to scale to hundreds or thousands of bots, and which can be easily applied to your own organization and automation journey.

1. Give your bots a personality to increase acceptance

Robots have been associated with replacing humans, yet a common theme across many customers is that **RPA is not about replacing FTEs**: for an average company about 80 percent of its data – from documents, emails, meeting recordings and other human communications – is unsuitable for automation. Processing this data requires human thinking to put it into a structure to feed standardized business processes.

Naming your bots and giving them a personality can increase acceptance dramatically and help people embrace them as virtual colleagues: crucial from a change management perspective.

Here's how it worked for a big UK retailer: The Journal Colonel automatically uploads thousands of journals into SAP every year, saving time and improving compliance. The accounting team where it was deployed (or hired) no longer has to work late at month-end, increasing employee satisfaction so much, the team nominated The Journal Colonel for employee of the month.

2. Get processes lean before automating them

For many organizations, **the biggest hurdle in their automation journey was their own processes**. Large and established companies are using lean techniques and agile methodologies to identify candidates for automation, which makes a massive impact on speed and quality of delivery. Automation enforces

standardization of the process and removes bad practices. The owners of RPA programs usually learn the hard way that **you shouldn't try to automate everything**.

3. Build an Automation Centre of Excellence (CoE) and adopt a federated operating model to accelerate and expand the implementation of RPA

Businesses are evolving from 'how to start' to 'how to scale'.

An automation CoE collaborates with the business to decide on the right processes to automate and act as a mission control for bots.

To move faster on RPA, the next step for some companies has been to adopt a federated operating model driven by the business for both wide and deep implementation. This allows as many people in the business to join the RPA workforce as possible, while the CoE provides best practices, support and maintenance.

AI takes automation to the next level

While RPA automates well-defined rule-based operations with structured data, 80 percent of enterprise data is unstructured. Think about how you schedule a meeting in Outlook: pick time from the calendar, select participants from the address book and meeting rooms from the list. All data is well structured, so Outlook can easily complete the task. Is this the most efficient way or it is the only way to do it because of limitations of technology? When you talk to a human, you would ask to book a meeting with the team for tomorrow afternoon in the big enough room, and you can be sure your request will be understood and fulfilled.

Can technology do the same? Yes it can, but it takes intelligence to understand your unstructured request in natural language and convert it into structured form – list of time, contacts and room selection. This is what's possible with AI, which takes automation to the next level by adding intelligence and **converting simple bots to intelligence digital workers**.

Back on track:

an award-winning business transformation case study

Veolia Apa Nova Bucharest

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PEX AWARD
WINNER

What it takes to win the first place in the world for your business transformation project and making the results sustainable

KEY LEARNINGS:

- › Develop a strong knowledge base
- › Identify processes, removing redundancy ✓=
- › Define clear roles ✓=
- › Bottom-up redesign, top-down decision-making
- › Reduce organizational complexity
- › Reward those who embrace the new structure

"When appointed in November 2015, the main objective of our management team was to put the company back on track. Four years later we achieved it. We did not only exceed all stakeholders expectations, but on top of that we won the first place in the world with our transformation project at OPEX Week 2019 Business Transformation World Summit."

Madalin Mihailovici and Irina Munteanu

Madalin Mihailovici is Veolia Group CEO

Irina Munteanu is Chief Financial Officer at Apa Nova Bucuresti and Veolia Romania

The need for change arose within Apa Nova Bucharest at the end of 2015 due to the organization's desire to become more efficient and balanced in current operations and to take advantage of the opportunities

newly identified in the market. This re-design approach came from the desire of the management team to rethink the 'backbone of the organization' according to the healthiest principles of modern management. From the combination of influences of external factors and these desires, the program of 'strategic and operational reengineering' was created. Its targets were for Apa Nova Bucharest to be redesigned from the ground up, following a correct sequence of phases, taking into account the specific speed of transformation of the organization while maintaining operational continuity.

The first phase was represented by the **design and development of a knowledge base and cultures of excellence of business processes**, through the development of a **new organizational architecture** with the direct involvement of more than 600 employees from the existing 2,165 at the start of the project. The **processes of the organization were discovered, redundancies from different areas were analyzed and eliminated**. Some areas were completely redesigned. **Clear roles have been identified**, on the basis of which new job descriptions have been constructed that reflect the competencies required to perform each activity in the processes.

The organization was **redesigned from the ground up** by the Apa Nova employees, bottom to top, activity by activity, while having **top-down decisions**. The previous organizational structure, consisting of 11 levels - which made it difficult to organize effectively, communicate and make decisions - has become **dynamic and agile with five organizational levels at most**. The newly created framework followed the definition of the performance indicators; aligned vertically and horizontally; and **created a monitoring and control process**, together with the implementation of the most advanced risk management practices throughout the company. During this time, throughout the project, **informal leaders who embraced the new organizational culture were identified and gradually promoted**.

Back on track: an award-winning business transformation case study

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After three years from the start of the project, the company registered a significant improvement of the operational results, such as the reduction by up to 90 percent of the intervention time in damages notified by clients; an increase of the efficiency of the water distribution network by almost 9 percent (reaching 78 percent); and a 71 percent decrease in the unplanned availability time of the drinking water supply service. Other commercial increases include wage increases for employees; significant improvements in working conditions; economies that allowed investments in the community such as the modernization of Unirii Square Artesian Wells in Bucharest. Moreover, the program was awarded in January 2019 as the best organizational transformation project in the world at the PEX Awards 2019 in Orlando, Florida.

“The next strategic decision was twofold: to extend the project by starting the optimization of the entire country business setup for all seven Veolia companies in Romania, and in parallel to develop and institutionalize a quality and continuous improvement capacity in Apa Nova Bucharest.”

Madalin Mihailovici and Irina Munteanu

Following the successful pilot deployed at Apa Nova Bucharest, since August 2018, a country-level replication naturally followed. As such, all business units have been added to the scope of the project. That meant creating an environment of synergy type projects across all business units for identifying, mapping and improving all suitable processes for alignment and standardization, including all relevant and useful IT tools.

The result generated a meaningful collaboration between six organizations, all at the same time, creating space and context for all to put forward their best practices and to give each organization motives to create the best possible process for all to implement. By doing that they

added an important brick to creating an organizational architecture model ready to be used for future mergers and acquisitions on the one hand, and on the other hand, another brick for the future country business setup.

After six months of process identification, standardization and alignment, starting in January 2019, the preparation for the implementation stage began. This required starting with appointing and properly empowering process owners to follow through implementation of the aligned and standardized processes across all organizations.

Implementing the newly designed processes not only meant that seven different organizations had to commit to this grand plan, but also the people at each level within those organizations. In practice, as things are made or broken by the people executing the work, a key element in the successful implementation was the learning attitude behind it. The monitoring of the newly implemented processes is of highest importance, with the purpose of learning, improving and bettering these processes. That paves the path towards an optimized Veolia setup in Romania.

Regarding the quality and improvement capacity deployment in Apa Nova Bucharest, as a first step this has the best possible foundation, being based on the logic of work processes and their performance management. In 2018, the continuous improvement directorate was established and gradually resourced. Initial awareness training in lean six sigma methodology was performed, leading to the design and implementation of the project selection; the improvement of project portfolio management processes; and the next lean six sigma level to start via a project-by-project approach. On the quality side, non-conformity management and advanced root cause analysis are now in sight.

Overall, this project is a living proof that a company that is willing to organize itself to deal with the challenges of the 21st century, can do it. And to share it with the OPEX community, a book about this successful Veolia case study will be launched at OPEX Week 2020: Business Transformation World Summit.

Process digitization: the single largest success factor

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Paul Stone, a Solutions Architect at FlowForma, provides his thoughts on what makes digitization projects succeed.

The big change in digital workforce through the next year is going to be the democratization of the technology: it will come out of the hands of experts and into the hands of the people who are going to use it day to day.

Successful process digitization happens like this: there's an internal selling within a business to get the idea of process automation accepted. These early efforts get results and there is **a snowball effect, driving the adoption of process digitization techniques across the whole enterprise.**

One of our clients, a hospital, was drowning in paperwork. The IT director decided he would try and push everyone to digitize the whole hospital to improve patient experience. But it was important not to just hand this down – they set aside one person from the IT team and one business leader to form **a small center of excellence which they called a process clinic.** Doctors, nurses and other patient staff could attend the clinic with their issues and that's how they started getting the small successes they needed to get the snowball rolling.

One example is theatre notes: surgeons performing procedures on patients would manually complete a paper form detailing the procedures carried out and the instructions for post-operative care of the patient. They implemented a process for recording the surgery details on an electronic form. The form pre-populated patient details and validated the input from the surgeon, ultimately generating a theatre notes document for the patient's file. This new process greatly reduced the need for follow up with the surgeon, post-theatre, saving time and improving patient service.

The staff became more enthusiastic and started to look to other opportunities for process digitization 'driving

digitization throughout the hospital. They could see the improvement in patient experience and measure the impact of the effort that was going in.

You have to get somebody on board in the organization that's going to sell the concept of process digitization within the organization itself. Identify who that person is going to be, and **very often it's not the obvious 'process expert' person.** It's often a member of the management team who has been around for some time and has a good network. **If you look at success factors, that's possibly the single largest success factor that can make a difference.**

"Having seen many of these digitization projects, one thing is crucial: appoint a champion."

Paul Stone

Solutions Architect, FlowForma



Creating a culture of innovation and nurturing disruption

Nimesh Sharma is Director/Head of Intelligent Automation and Robotics (RPA) at Travelport, a Travel Commerce Platform providing distribution, technology, payment and other solutions for the travel and tourism industry.

Sharma told us that automation must be thought of as a solution to problems, and that decision-making should not be displaced. To create a culture of innovation, Sharma advocates using teams made up from across the organization to identify problems and apply the most appropriate solutions. While there may be resistance to change, Nimesh says that engaging the team and showing that solutions work will help sustain innovations.

KEY LEARNINGS:

- › Ensure diverse teams deeply understand process problems
- › Use tech to augment human work – not push issues elsewhere
- › Disruption can be controlled with the right process and governance
- › As robots get smarter, the people working with them will become more creative

PEX Network:

As head of IA and robotics, what should PEX leaders do to match the right problem to the right automation solution?

Nimesh Sharma:

My division is married to continuous improvement, and we work hand in hand. Every time there is an opportunity, the lean team host a kaizen event around this problem, and all parties participate. Process is sometimes beyond the remit of the team that is calling it out as a problem. So we add more people until we really understand the drivers within each process group that leads to this process. That's the ground work done.



Creating a culture of innovation and nurturing disruption

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In a typical innovative design-thinking methodology, we create a work group where many of these participants from the kaizen event try to understand what has to be done to this process to sort it out. Automation is somewhere behind the scenes at this stage. First we understand the problems within the value stream. Then we turn that solution on its head, before we ask what can be automated.

Just automating an activity or series of activities is not what efficient automation should be doing. We've learned from this mistake of automating what humans were already doing, articulating new workflow cycles when some of these judgemental elements that were part of the process were either pushed upstream or downstream. We challenge each other and identify where work can be augmented effectively.

PEX Network:

Is innovation an innate way of thinking or a learned skill?

Nimesh Sharma:

I think there's an element of learned behavior. Some people can't think until they can see. And some people come up with a solution without having to go through the whole process. That's why we have this cultural push within our company. Everyone within the portfolio is trained on lean basics, up to the level of green belt so that they can give direction to the behavior, implement that culture of not thinking within bounds, or create a benchmark for themselves they can't go beyond.

PEX Network:

Disruption sounds like rule breaking, but you do innovation as part of an established way of thinking about the business.

Nimesh Sharma:

It's a controlled disruption, a culture of disruption where the ideas can come up from anywhere. There is no bias for or against that. Every idea is valued and argued on its merit. There are some who say that these quality practices like six sigma are to control your imagination. I think on the contrary, these are guideline frameworks designed to

be disruptive, to help you keep your eye on the goal and think beyond limitations.

PEX Network:

People tend not to like uncertainty, so how do you get people engaged with these changes?

Nimesh Sharma:

We use John Kotter's eight-step model for change. The idea is to identify an opportunity and a problem that has to be solved. Get a coalition, like the working group, to gather and generate ideas about how we can quickly solve some problems. Power this working group to be the evangelists of change. Then build up the momentum and use that to drive production to the wider problem we are trying to solve. That works most of the time, but the success rate is not 100 percent, because there are always some people who have an interest in the status quo and trust could be an issue outside their comfort zone and corporate culture. When people really see the value of change, is where I think the change agents are adding value. The message must be that although change is difficult, at the end of the day our life is going to be a lot easier.

PEX Network:

When robots do the boring, mundane processes, do you think we are all going to become much more productive at work?

Nimesh Sharma:

I think RPA is going to have a massive effect, not just on the business users but even on the software that will be produced. Right now we are creating these customer solutions, people are adopting a cloud-first mentality and most of the ERP systems are on the cloud with standard functionality. Expect developments that will have an impact on how user interfaces will become more robot friendly.

I think the real creativity will come about when RPA becomes commonplace and robots become so intelligent they can learn from the process flow, use data analytics and reprogram themselves to deal with a particular situation.

Strategies for transformation

Jayshree Pandya on the risks and challenges of intelligent automation



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Jayshree Pandya researches strategic security risks emerging from disruptive innovations and reviews the diminishing capacities of risk management. As governments and nations make a move from centralization towards decentralization, the redefining and redesigning of systems at all levels evaluated in her comprehensive research includes AI, the IoT, blockchain and quantum computing.

KEY LEARNINGS:



- Automation is a direct challenge to the status quo
- Businesses need to start planning for transformation
- Retraining is a key part of working with automation

transformed and they are accepting the positive transformation that they would have.

If corporations think that they are immune to what is coming then they are probably misguided. They need to focus on thinking about how to transform now, because if they don't, then someone else will do that for them. It is as simple as that.

Innovation is not happening just within the PEX industry, it is coming from outside the industry. The strategic security risk is what all these corporations need to be very mindful about: will some innovation disrupt your products, your services, the way you're doing things? Whether it's government, industries, organizations and academia, they are not focusing on the strategic security aspect.

PEX Network:

Why is automation such a hot topic in the PEX world?

Jayshree Pandya:

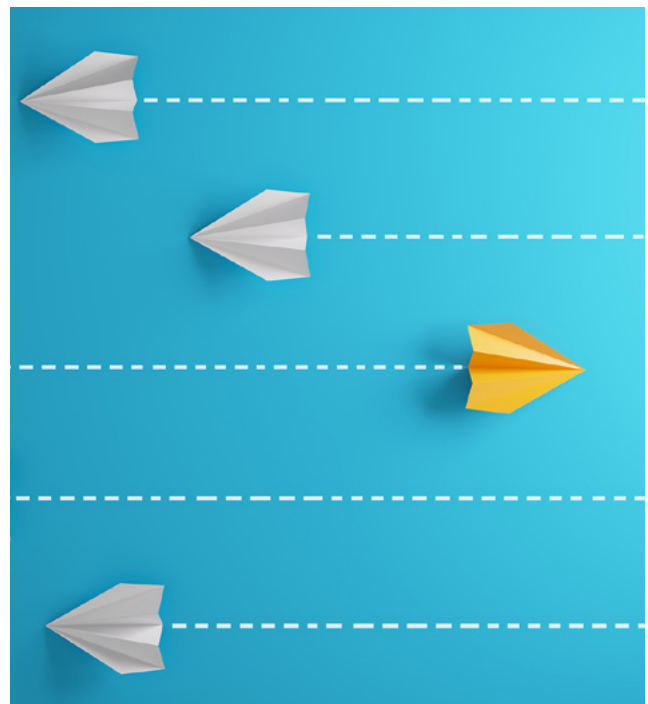
Automation has been going on for a long time, but the nature of automation has completely changed. The processes that are being automated now, nobody thought were possible to automate before. From the financial industry to government, there is no industry that will be left untouched. This is an entirely different kind of automation and it is going to fundamentally transform the way we do things everywhere.

PEX Network:

How deeply do you think it's going to get into companies?

Jayshree Pandya:

There are many organizations who think they don't need to do transformation because everything is working fine. But the challenge here is that processes are being automated. The energy industry is not very willing or eager to go ahead and change the way they do things, but now the processes are being fundamentally



Creating a culture of innovation and nurturing disruption

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**PEX Network:**

What might these unforeseen risks look like?

Jayshree Pandya:

The healthcare industry never thought that somebody could fundamentally replace the role of doctors. But with just something as simple as taking your blood pressure, all that can be diagnosed using your wearable. Who would have thought that was going to happen? In coming years most of the roles of doctors will be taken over.

PEX Network:

What role do PEX departments have in how to protect their organizations?

Jayshree Pandya:

‘Organizations should start planning and developing the thought leadership around how they can positively transform the business. With automation, you will be able to accumulate speed and cut the operation costs. That excites PEX business leaders.’

At the same time, we have to understand and realize that the current skill set won't be necessary and think about how to properly retrain people, especially in nations where automation is advancing rapidly.

PEX Network:

What are some of the responses to this wave of automation from business and government?

Jayshree Pandya:

I see a lot of denial. A lot of decision-makers are not

prepared to think about it. At the end of the day, this is going to happen in every country. It's going to create a lot of challenges that are more complex, because there are many security risks in motion which we all need to be very careful about. You don't want to create mass turmoil in any nation because that's not the goal of any tools of technology.

PEX Network:

What's going to happen next for PEX?

Jayshree Pandya:

All this technology you see right now started from AI regenerating, and all this technology you can use for good, you can use for bad. There are a lot of security risks emerging, and processes to mitigate these may end up on the back foot. That is my biggest fear: that while there is great potential with these emerging technologies, their dual-use nature can be a potential risk to humanity.

The best case scenario is that we have a whole new level of intelligence that is coming our way, not only from machines. We will be able to use conversational AI and cognitive computing and overall, we will be able to double up intelligence in our businesses and other organizations. So, we will be able to create a sort of collective intelligence between man and machine. That would help us explore our own universe. Not just on the Earth but go in space and explore the planets and even beyond that. So that will help the future of humanity.

OPEX Awards 2020:

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Meet the judges

The annual Global OPEX Awards recognizes, honors and celebrates individuals and teams who have made a commitment to driving superior operational excellence and business transformation.

The award categories for 2020 are:



Business transformation leader of the year



Best operational excellence transformation program under two years



Best operational excellence transformation program over two years



Best achievement in transforming organizational culture



Best process transformation project under 90 days



Best enterprise-wide transformation project



Best digital transformation project



Best transformation project delivering customer excellence

Submissions for the Global OPEX Awards 2020 close on 13 October 2019 with the shortlist of finalists being announced in November 2019. The winners will be announced in a ceremony at the 21st annual OPEX Week: Business Transformation World Summit in Orlando, FL on January 22, 2020.

Find out more online



Last year's winners



OPEX Awards 2020: Meet the judges

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We talked to three judges about what they are hoping to see from 2020s nominees: Sachin Ahuja, Senior Program Leader at TELUS, Sanjay Gupta, Transformation and Continuous Improvement Executive and Alisha Kale, VP Business Process Engineer, CSSMBB.



Sachin Ahuja
Senior Program
Leader,
TELUS



Sanjay Gupta
Transformation and
Continuous
Improvement Executive



Alisha Kale
VP Business Process
Engineer,
CSSMBB

What do successful transformation leaders do differently?

Sachin Ahuja:

Successful transformation leaders have a clear vision, define the goal, know exactly why to do each transformation and the benefits the change will bring, by assessing every risk and planning for change.

They put a strong governance model in place to manage the roadmap and remove barriers, manage stakeholders and ensure it is clear how they will be proactively involved in making the transformation happen and by maintaining their engagement.

Sanjay Gupta:

They assess the needs of the company along with those of the stakeholders, employees and shareholders. They drive to make optimal improvements. They take a 50,000-foot view of needs and progress.

Alisha Kale:

Strong transformation leaders develop a vision to bring forward the required change while inspiring and gathering feedback. They look for potential leaders and ensure the vision is delivered perfectly. Ultimately, they encourage the team to materialize the vision.

What makes for a brilliant transformation project?

Sachin Ahuja:

The best projects integrate the transformation strategy to the overall company strategy and cultivate a dynamic culture by actively encouraging risk taking and agility.

The leadership needs to plan ahead with a robust future state assessment, looking out over a long-term time horizon.

Sanjay Gupta:

First and foremost it engages employees, delights the customer and ultimately creates a leading artifact for the company, meaning it creates culture— an inspiring thing for others to follow.

Alisha Kale:

A project where all team members are onboard culturally to the project's intended aims. The communication plan for execution is delivered through all of the organizational levels, while ensuring teams are innovative in their decisions and actions.

What skills and experience do you bring to your role as a judge?

Sanjay Gupta:

I've been on the judging panel for the last 15 years. I'll be bringing huge industry experience and a critical eye to find talent.

Sachin Ahuja:

As a highly collaborative leader with a background in management consulting and business leadership, I deeply appreciate good strategy and a strong fact base.

Alisha Kale:

I am a master black belt in six sigma with 19 years of process excellence experience. I have led two Fortune 500 companies through transformational change.

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We feature thought leadership from the front line of businesses undergoing change and transformation. Want to share your story with your peers in the PEX community? Get in touch with our editorial team today and you could become one of our influential contributors.

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