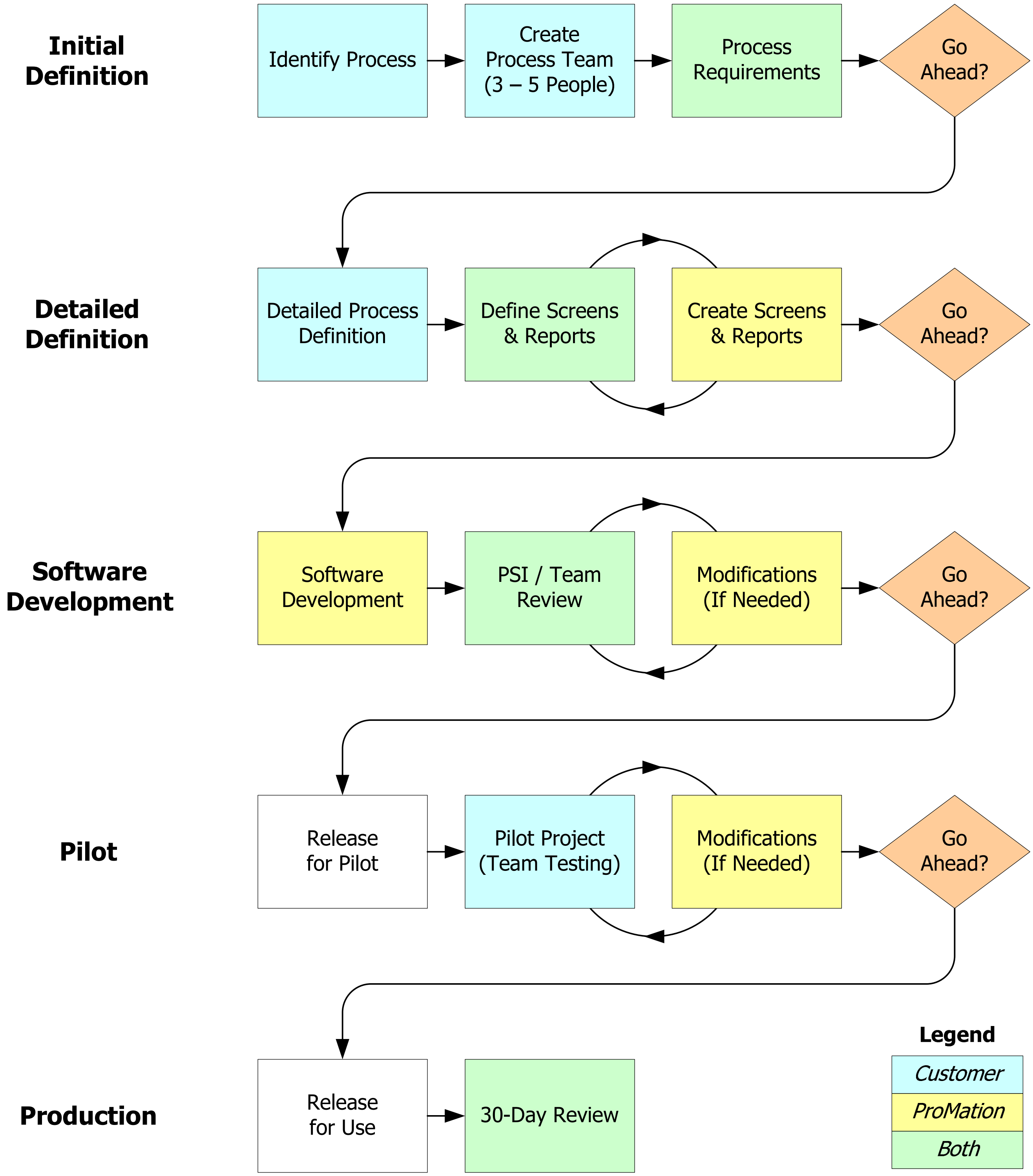
Business Process Development Steps



Initial Definition

Identify Process: This is where you choose which process you to automate now. This could be based on responding to a regulatory requirement or specific business need, or could simply be what gets you the most result for your investment right now.

Create Process Team: To develop a well-working business process, you need a team – no one person knows it all. There should be one person from each department or area that is affected by the process. More active departments may have a more active role in development activities, but all affected areas must at least be aware of the team's activities so they can have input when needed.

Process Requirements: In this step your team and ProMation Systems (PSI) will review the capabilities and features that your Lean Office System (LOS) will provide. With this knowledge, you can create a general description of what your process will do, and create a list of the business requirements that your selected process must meet.

Detailed Definition:

Detailed Process Definition: This is where your team will detail out how you want your process to work and what data fields will be needed. This is often done with whiteboards, post-it notes, markers, and flowcharts. Take your time, have thorough discussions, and look for opportunities for simplification. Your team should challenge each other on the need for or the lack of process steps and features. Having your team go through this activity will create ownership for the end result.

Define Screens & Reports: You and PSI will define the screens and reports to make your process work. We'll need to make sure that all your requirements are met, all required information is collected, and that the process steps are sequenced correctly.

Create Screens & Reports: PSI will create the screens and reports. Coding is done in a minimal way to prevent overwriting work done in the previous step.

Software Development

Software Development: PSI will write all the software objects and code necessary to make the screens work. This is a fairly lengthy activity for PSI. PSI may leave some non-core screens and reports incomplete at this time so that the next review by your team is accomplished as soon as possible.

PSI / Team Review: During this review, the process will 'work' for the first time. Your team will need to verify that the automated process is working the way you need it to.

Modifications (If Needed): If needed modifications are found during the previous step, PSI will make those changes. Changes found during this step should be minimal.

Pilot Project

Release for Pilot: When ready, we'll place this module into your LOS in a test mode.

Pilot Project (Team Testing): Your team will operate this process module in test mode. The purpose is to verify that the design of the process module will actually do what you expected. It's common during this stage to uncover a few minor issues that you'll want to address. If the Customer Definition and Software Development phases were done well, you won't find any major issues.

Modification (If Needed): PSI will implement changes as needed. Changes made here should be minimal. If you find that you want to make major changes you may want to wait on those until you've used the process in production mode for a month or two first.

Production

Release for Use: When your team is ready to accept the new process module, it will be implemented in your LOS in production mode.

30-Day Review: It's valuable for PSI and your team to do a review approximately a month after release. This gives everyone a chance to review the development and implementation of the current process module and identify what went well and what could be improved – this helps the development of the next process module.