Automation Compass Framework

Transforming Operational Excellence into a Strategic
Partner: How Automation Compass Can Help

GET STARTED

Salient
Process

The Framework

The Automation Compass framework is designed to help continuous improvement teams achieve operational excellence. We developed this framework after conducting hundreds of interviews with teams struggling to justify their process improvement initiatives and deliver results that align with business needs. These teams were often seen as a "cost center" for the business, not contributing all the value they could.

How It Works

The framework leverages the Automation Compass tool and Salient Process methodologies to take process mapping, business architecture, value stream, and opportunity tracking to the next level. The goal is to achieve quick wins and start to spin the flywheel that will help the team move from a **cost center** to a **partner** that makes things happen for the business.
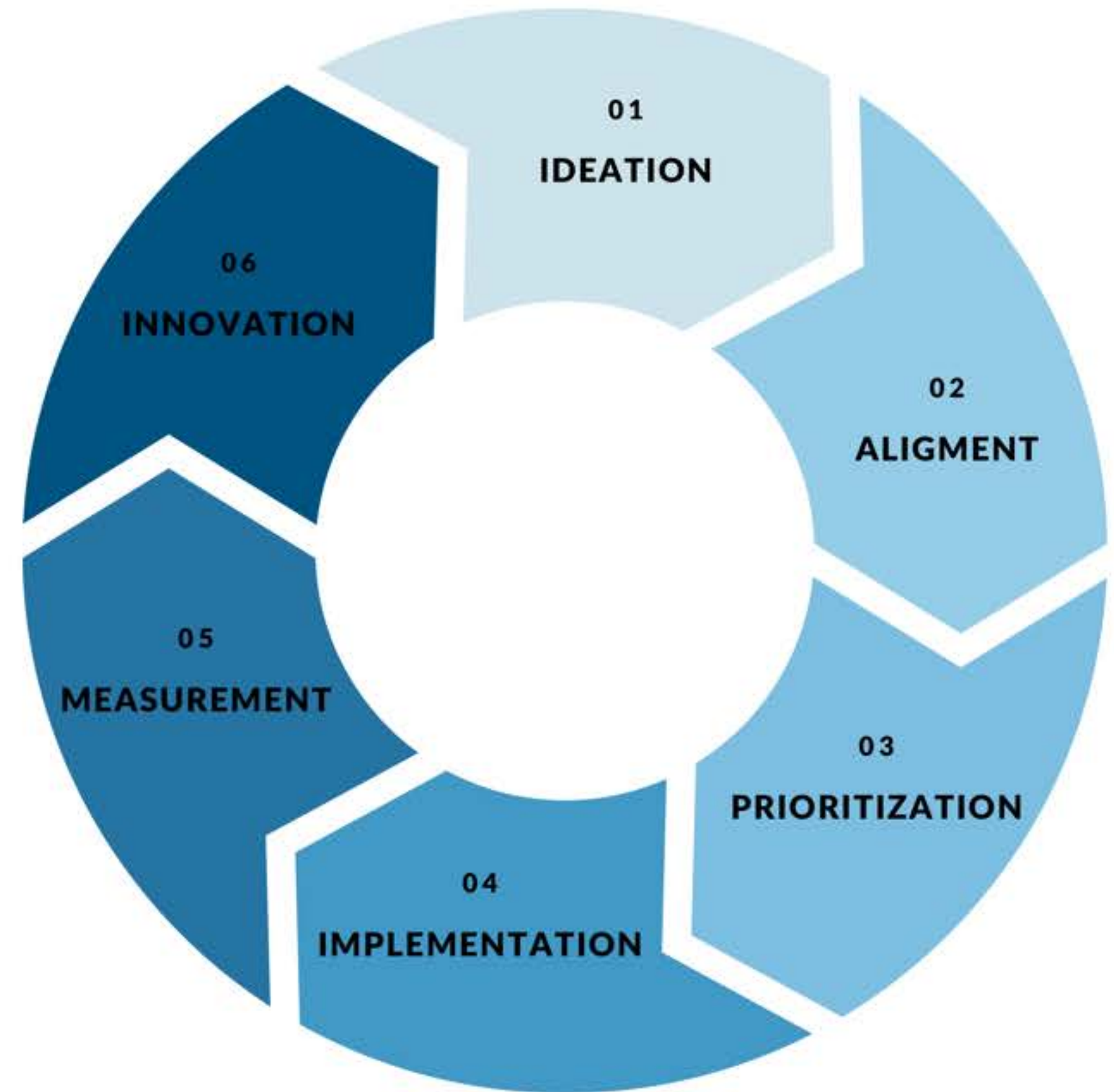
The Continuous Improvement Flywheel

It consists of six interconnected steps that work together to drive and maintain process improvements.

Every continuous improvement team faces the challenge of starting and maintaining momentum. The flywheel concept describes the effort required to get the wheel spinning from a standing start.

At first, it takes a lot of energy to get the wheel moving, but once it starts to spin, the momentum builds, and it becomes easier to maintain the motion.

- 01 IDEATION
- 02 ALIGMENT
- 03 PRIORITIZATION
- 04 IMPLEMENTATION
- 05 MEASUREMENT
- 06 INNOVATION

Salient Process

Step 1: Capture Ideas for Process Improvement

Capturing ideas for process improvement is a critical step to ensure that opportunities for improvement are noticed. Ideas can come from various sources such as employees, process owners, strategic requirements from management, or analysis by the process improvement team. It is important to capture these ideas in a maintainable way and track their progress to ensure that all ideas are considered.

Automation Compass provides a platform for capturing ideas for process improvement

Within the platform, you can create simple opportunities that are in the idea stage. The solution also provides tools and modules that can help teams find ideas for process improvement and analyze the current state of the process. By using Automation Compass to capture and refine ideas, teams can ensure that they are focused on the areas of the process that will have the most significant impact.

01
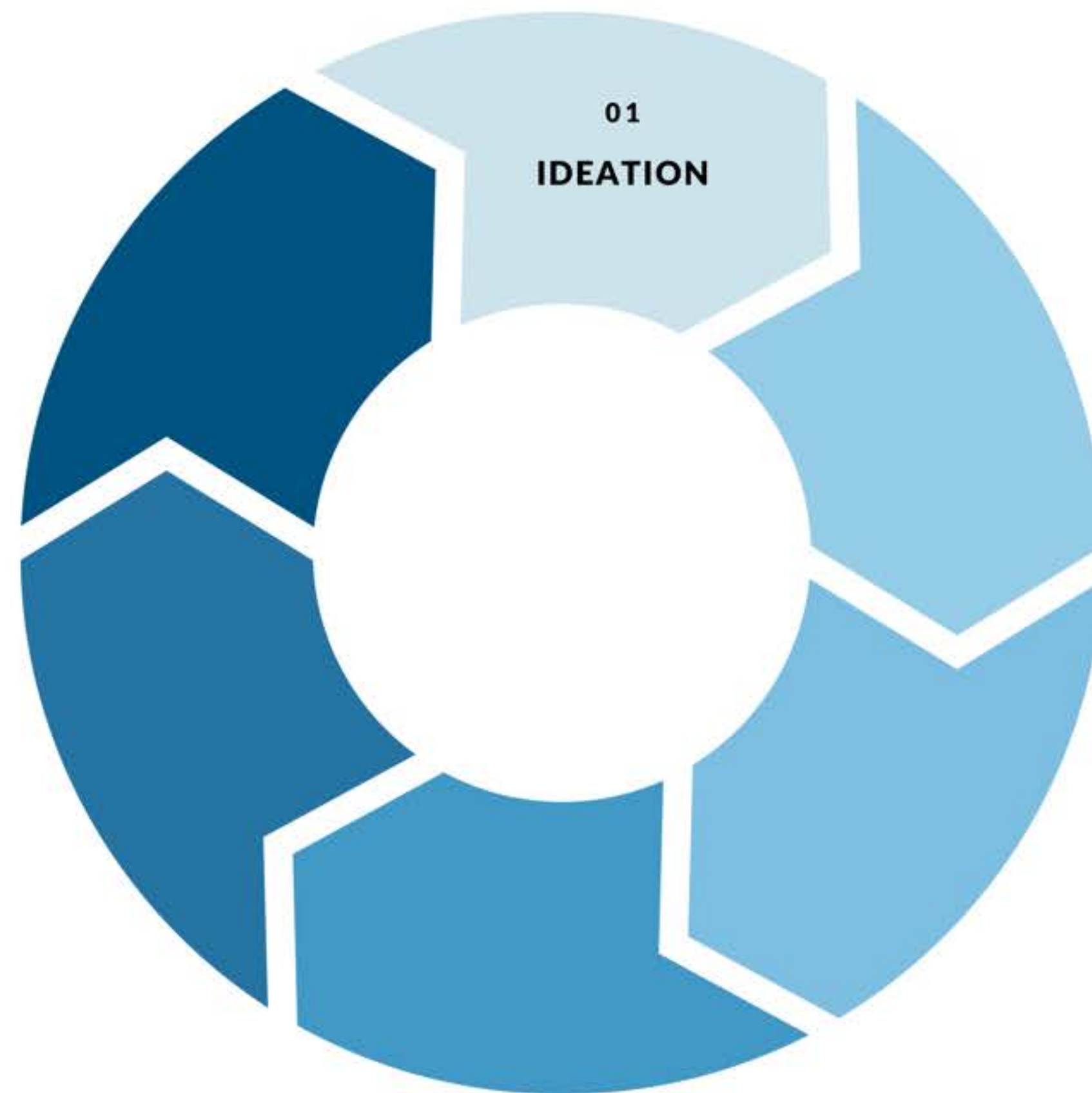
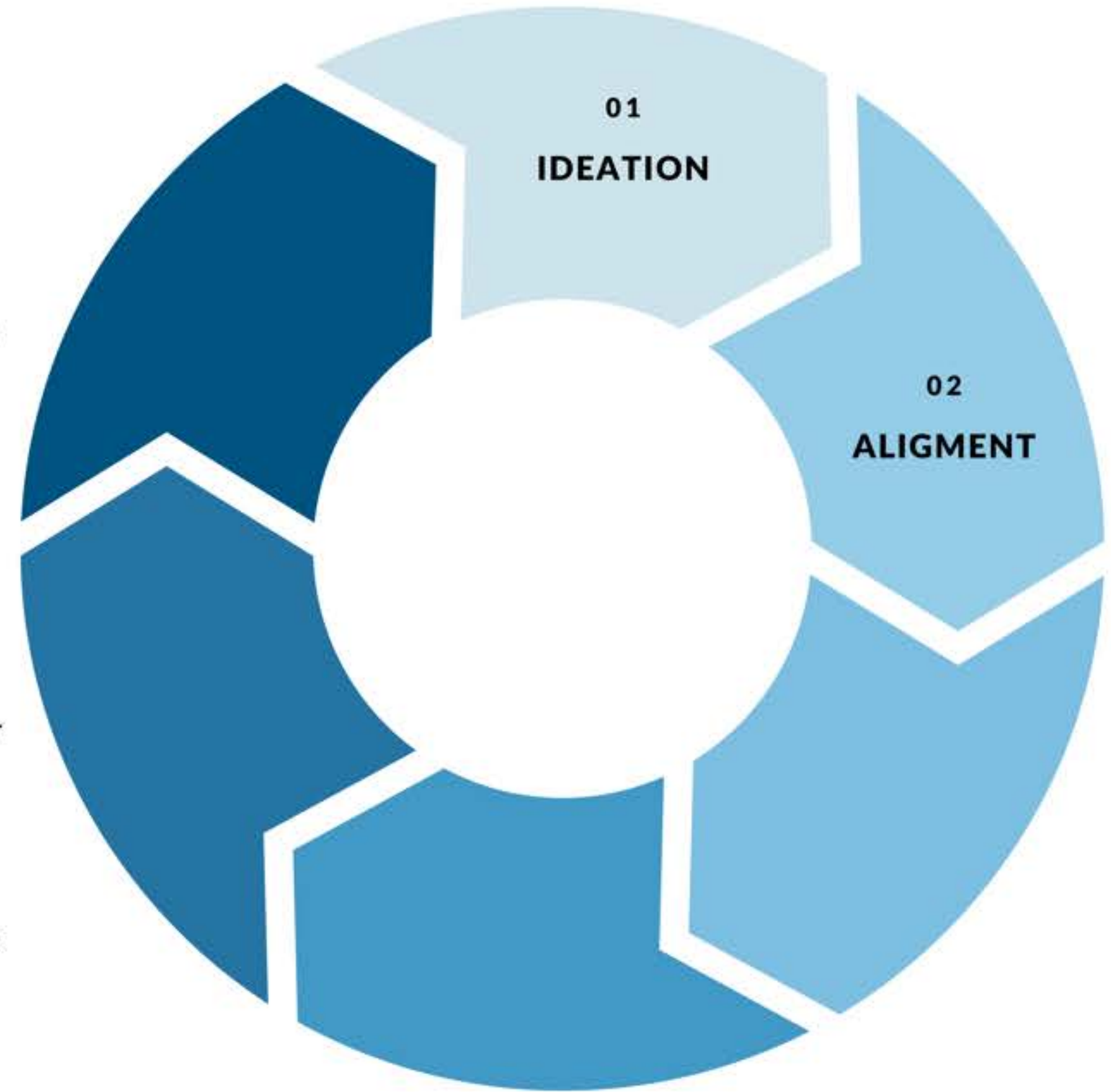IDEATION

Automation Compass Features for Step 1:

- ✓ Discover Automations AI
- ✓ Import opportunities from Excel
- ✓ Opportunity module in idea stage
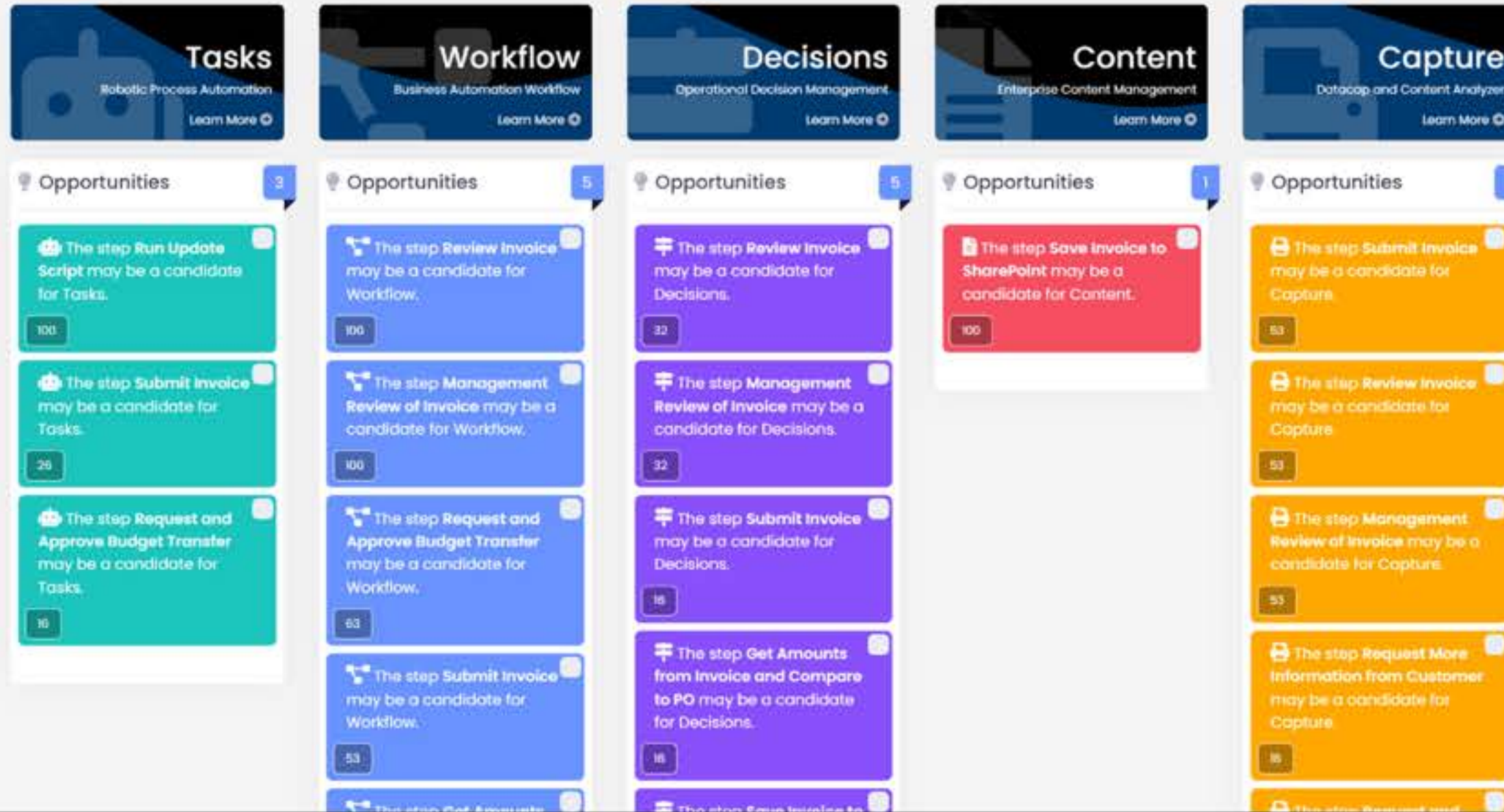
Step 2: Connect Ideas to the Strategy

By analyzing ideas and linking them to the strategy, the process improvement team can prioritize the ideas based on their contribution to organizational goals and determine which areas need attention. The method of linking ideas to strategy varies based on the maturity of the company's business architecture practice, with Level 4 being the most mature approach.

- **Level 1:** Use teams or organizational goals to determine idea priority and score its contribution to the goal.
- **Level 2:** Use the value chain or customer journey to identify areas for improvement and determine if the idea helps improve the stage that needs attention. if the idea helps improve the stage that needs attention.
- **Level 3:** Use a process framework to determine if the related process has a priority for improvement.
- **Level 4:** Uses a capability map to identify the impacted process and align the improvement with the strategy.

**01**
IDEATION

02
ALIGMENT

Step 2: Connect Ideas to the Strategy

Automation Compass supports the analysis of ideas in relation to the company's strategy by providing tools to capture the company's north star, goals, priorities, value chain, and capability map. This capability map is then heat mapped based on the company's strategy variables, which allows identifying the areas that require improvement in alignment with the company's strategy. Additionally, the tool links the processes and opportunities to the capabilities, which enables the team to understand the impact of each opportunity on the company's capabilities.

This information can be used to prioritize opportunities based on their alignment with the company's strategy, and it also helps to identify potential areas for improvement in the capabilities themselves. Overall, Automation Compass supports the process improvement team by providing a structured approach to aligning opportunities with the company's strategy and identifying areas for improvement.

01
IDEATION

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ALIGMENT

Salient Process
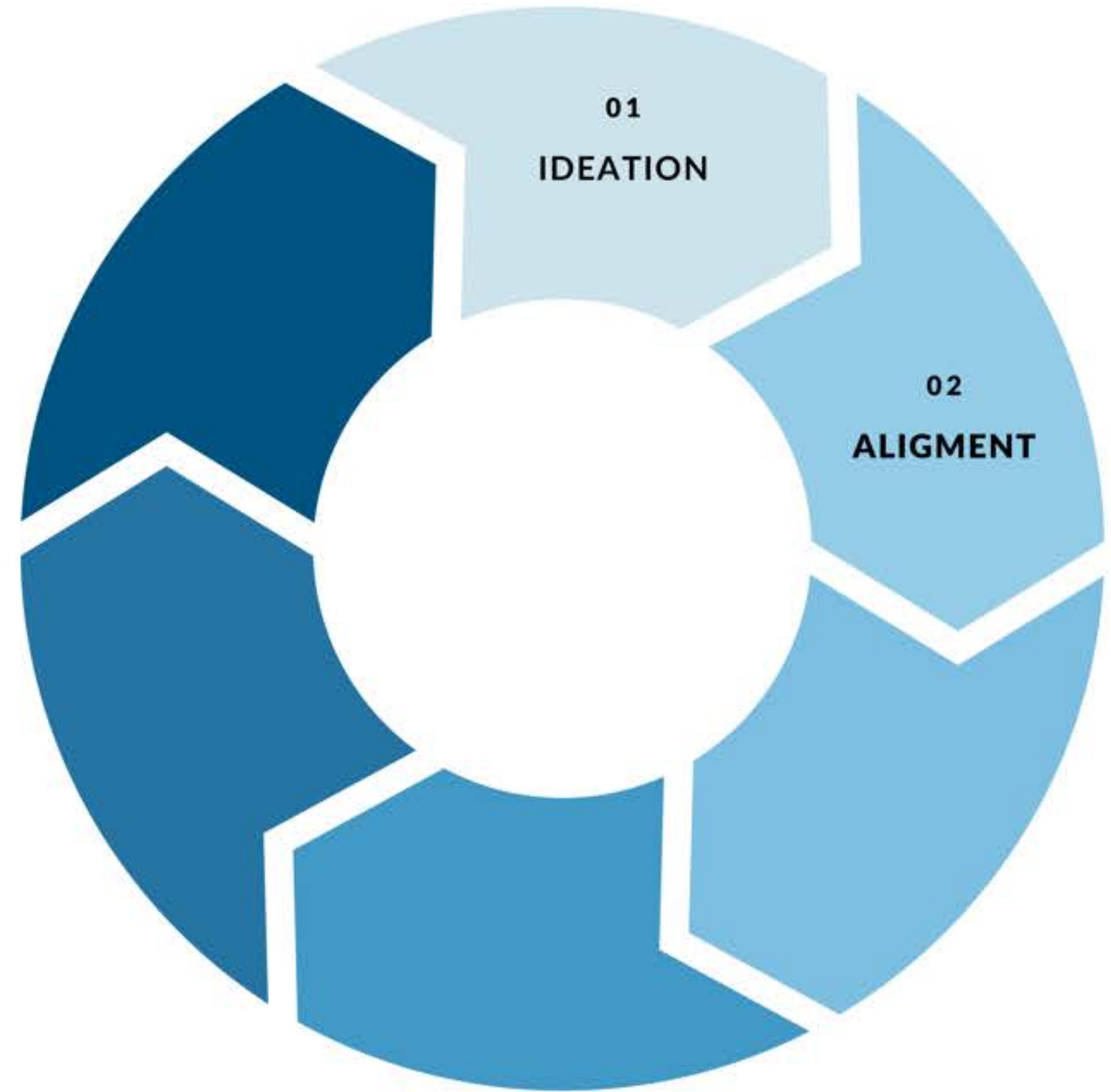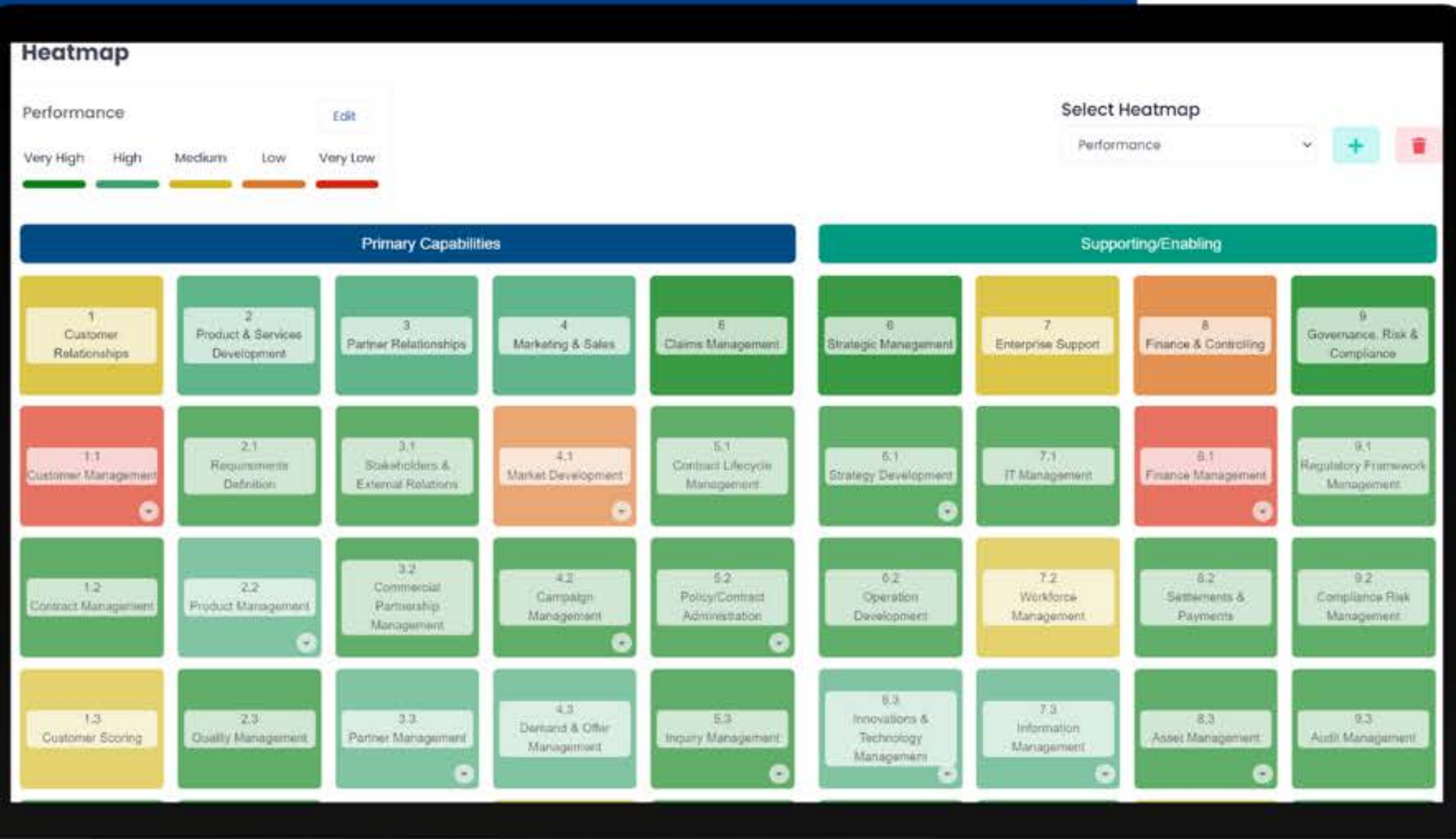
Automation Compass Features for Step 2:

☑ Capability Map

☑ Capability Map Heatmap

☑ North Star: Mission, Vision, Value, Goals, Priorities.

☑ Value Chain

☑ Organization Map

Step 3: Prioritize Opportunities and Present the Business Case

To prioritize opportunities for process improvement, the team should consider the company's strategy, goals, and priorities. They should also evaluate the ROI and impact complexity of each opportunity and consider soft benefits like employee satisfaction and customer experience. The business case should align with the company's values and take into account the strategic alignment, impact, complexity, and financial impact of the proposed solution.

Involve all relevant stakeholders, including process owners, team members, and other departments that may be affected by the changes. This will ensure that everyone has a say in the improvement effort and that the implementation is aligned with the overall goals and values of the organization.

01 IDEATION

02 ALIGMENT
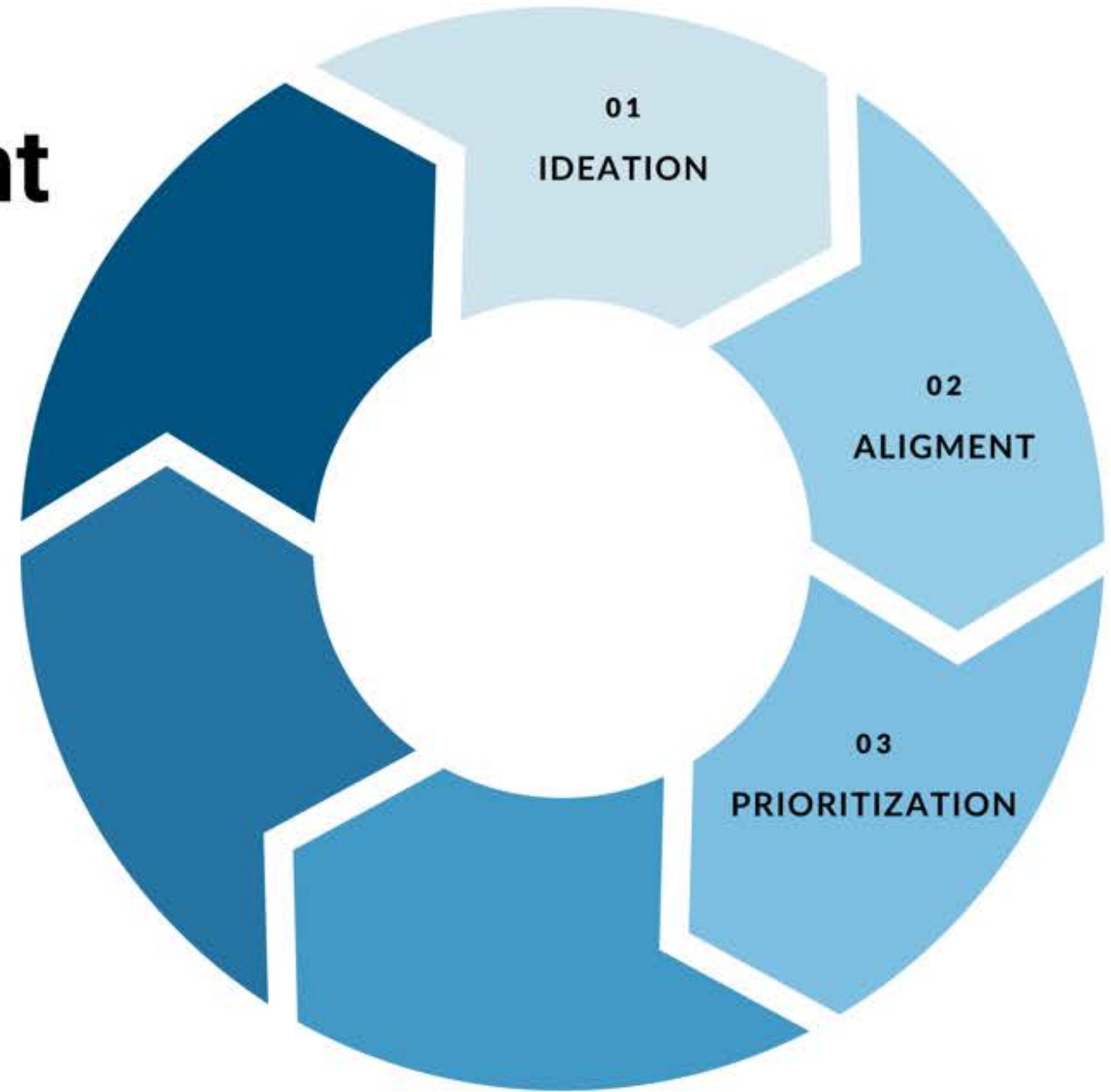
03 PRIORITIZATION

Step 3: Prioritize Opportunities and Present the Business Case

Automation Compass provides essential support in step 3 of the process improvement methodology by offering tools that aid in opportunity prioritization. The various widgets and views enable users to visualize each opportunity's impact, complexity, yearly benefits, and soft benefit scores. Moreover, it allows for data-driven decision-making that aligns with business needs. In addition to prioritization, the software also facilitates the creation of a compelling business case by collecting all necessary data. This includes opportunity information, simulation results for as-is vs. to-be scenarios, potential hours and money savings, and ROI calculations.

By utilizing these tools and data, the process improvement team can present a strong case for implementation that considers both financial and soft benefits, ultimately ensuring alignment with the company's strategy, goals, and priorities.


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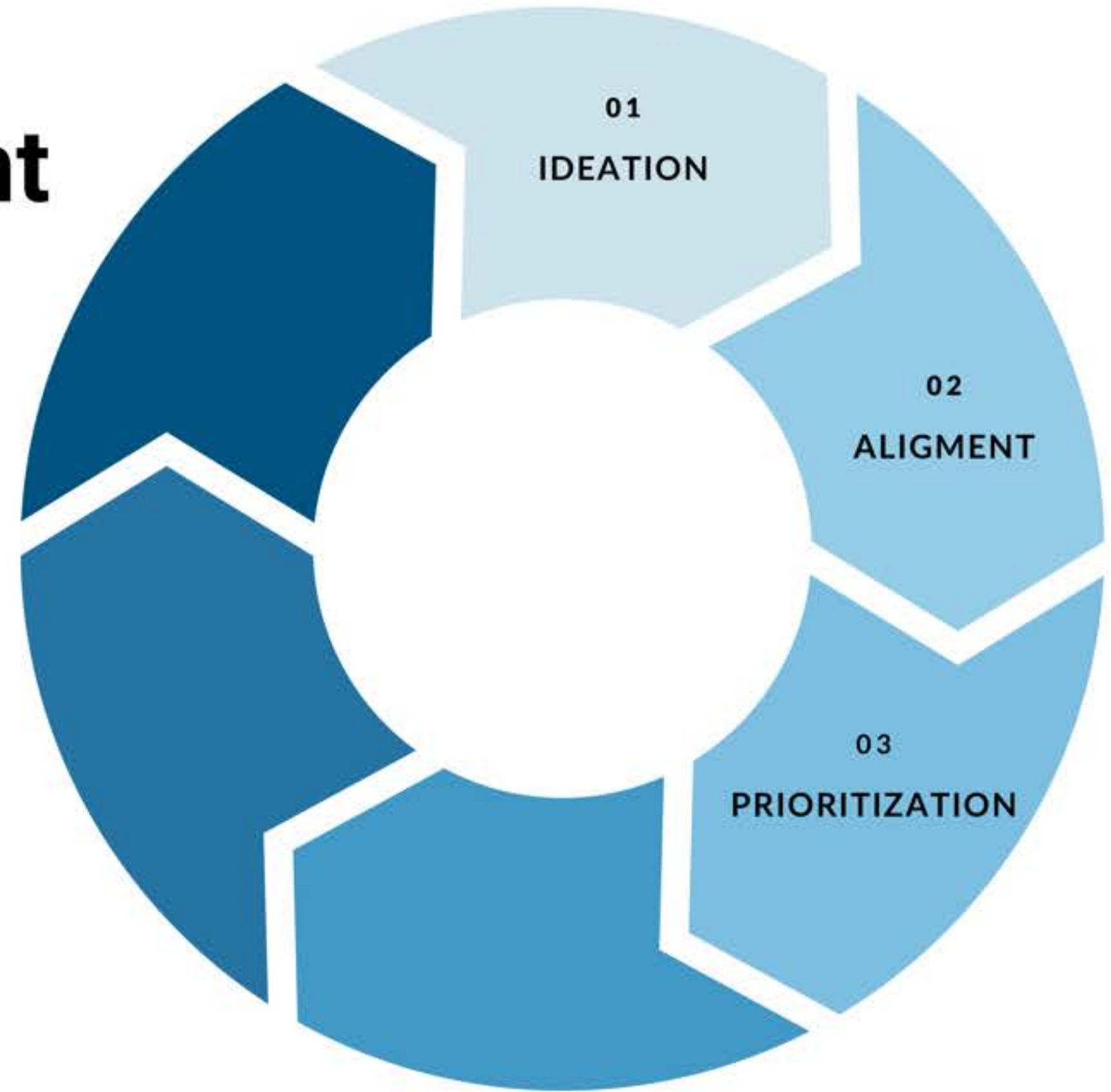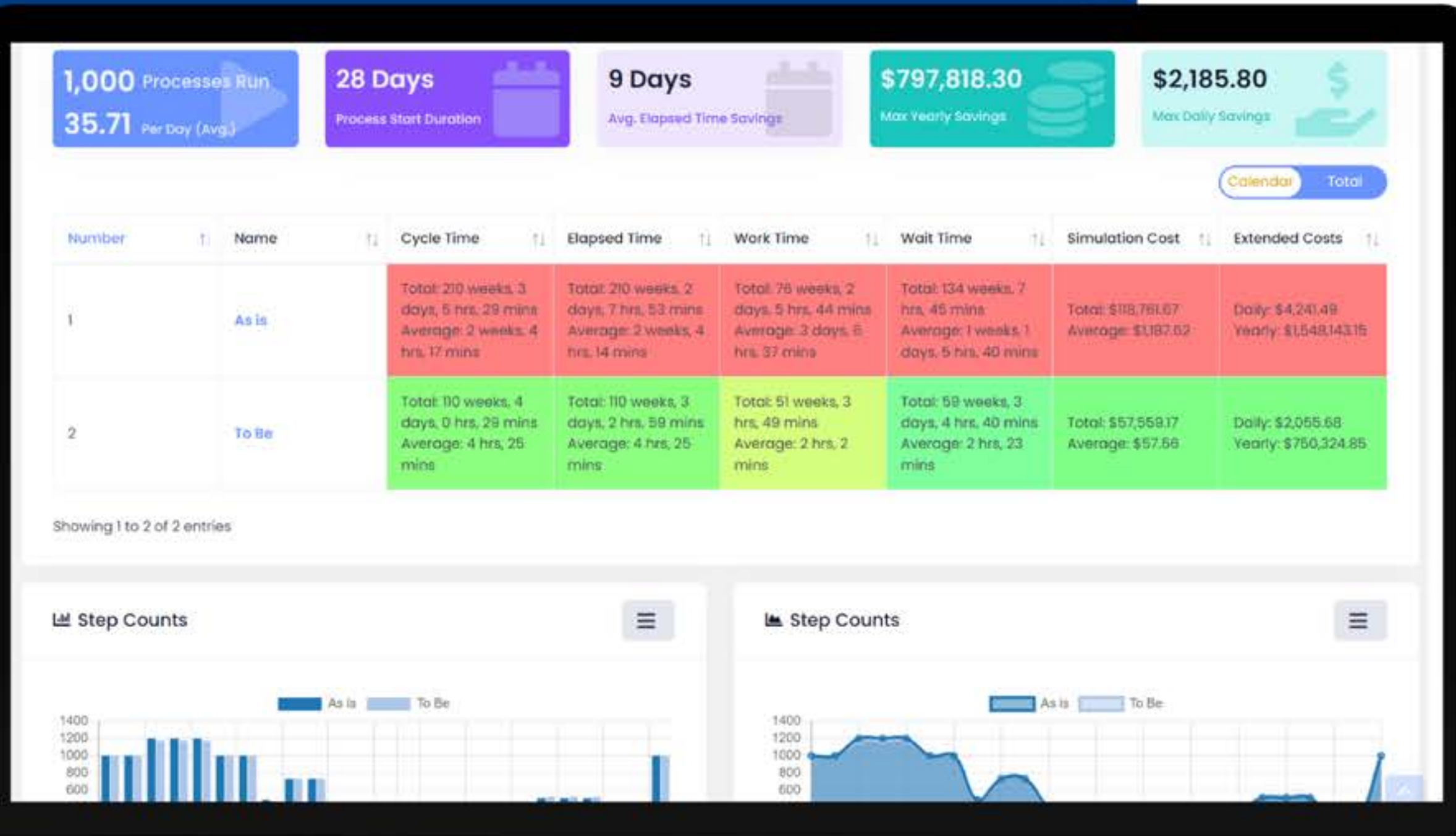
Automation Compass Features for Step 3:

- ☑ Simulation Engine
- ☑ ROI Calculator
- ☑ Opportunity information
- ☑ Opportunity Score
- ☑ Impact vs. Complexity Chart

Step 4: Implement the Improvement

Process improvement projects triggered by the implementation of an initiative involve cross-functional teams such as project managers and IT to ensure its success. The type of improvement required depends on the maturity of the process management practice, and the strategy for process prioritization. These could range from general improvement and lean methodologies to automation. Collaboration between different teams is essential to ensure the implementation process is successful and aligned with the company's overall goals and values.

Automation Compass supports the tracking of the different stages of an opportunity, from idea to deployment, and it will be integrated with project management tools to support this effort better.

01 IDEATION

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04 IMPLEMENTATION
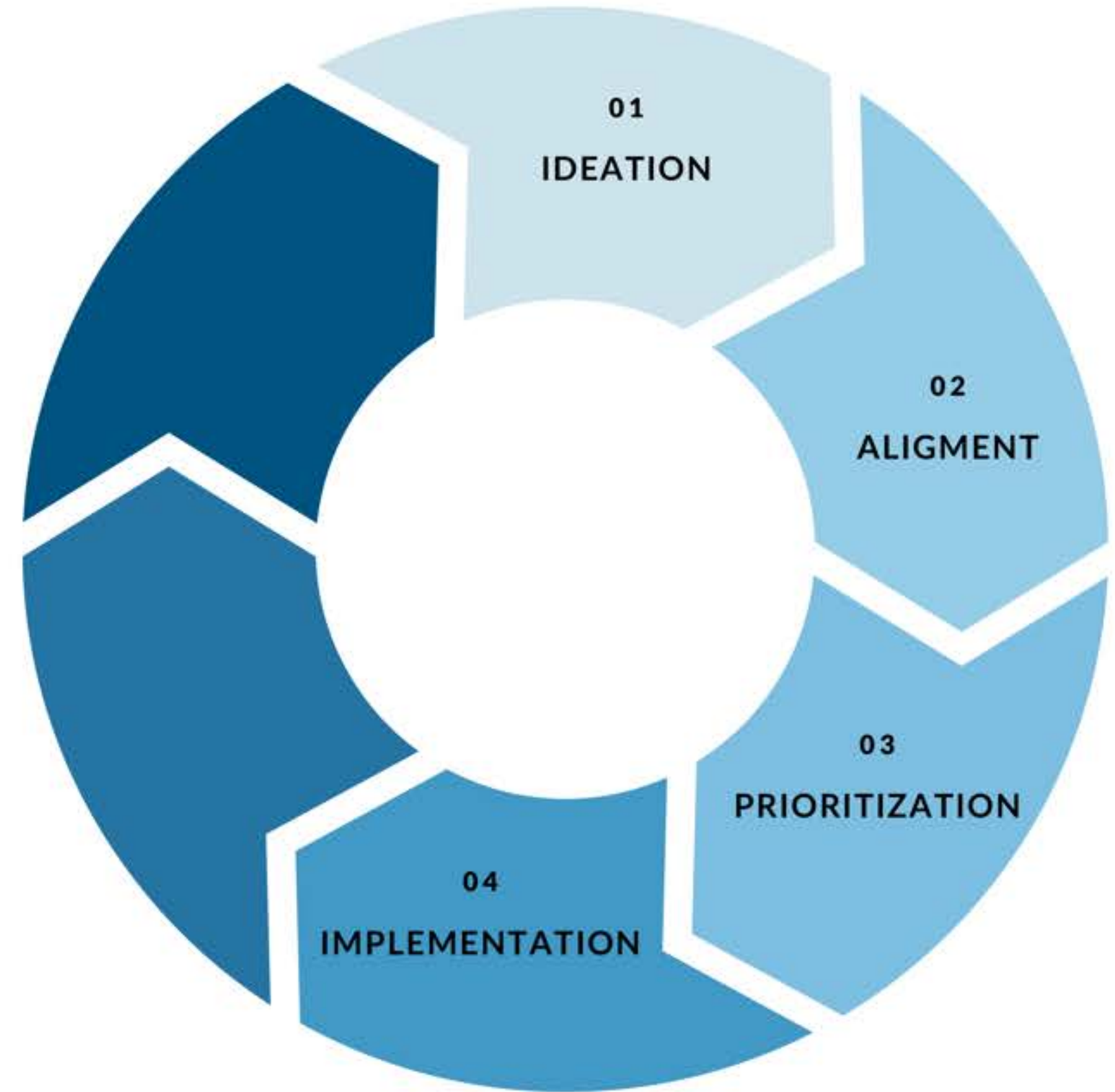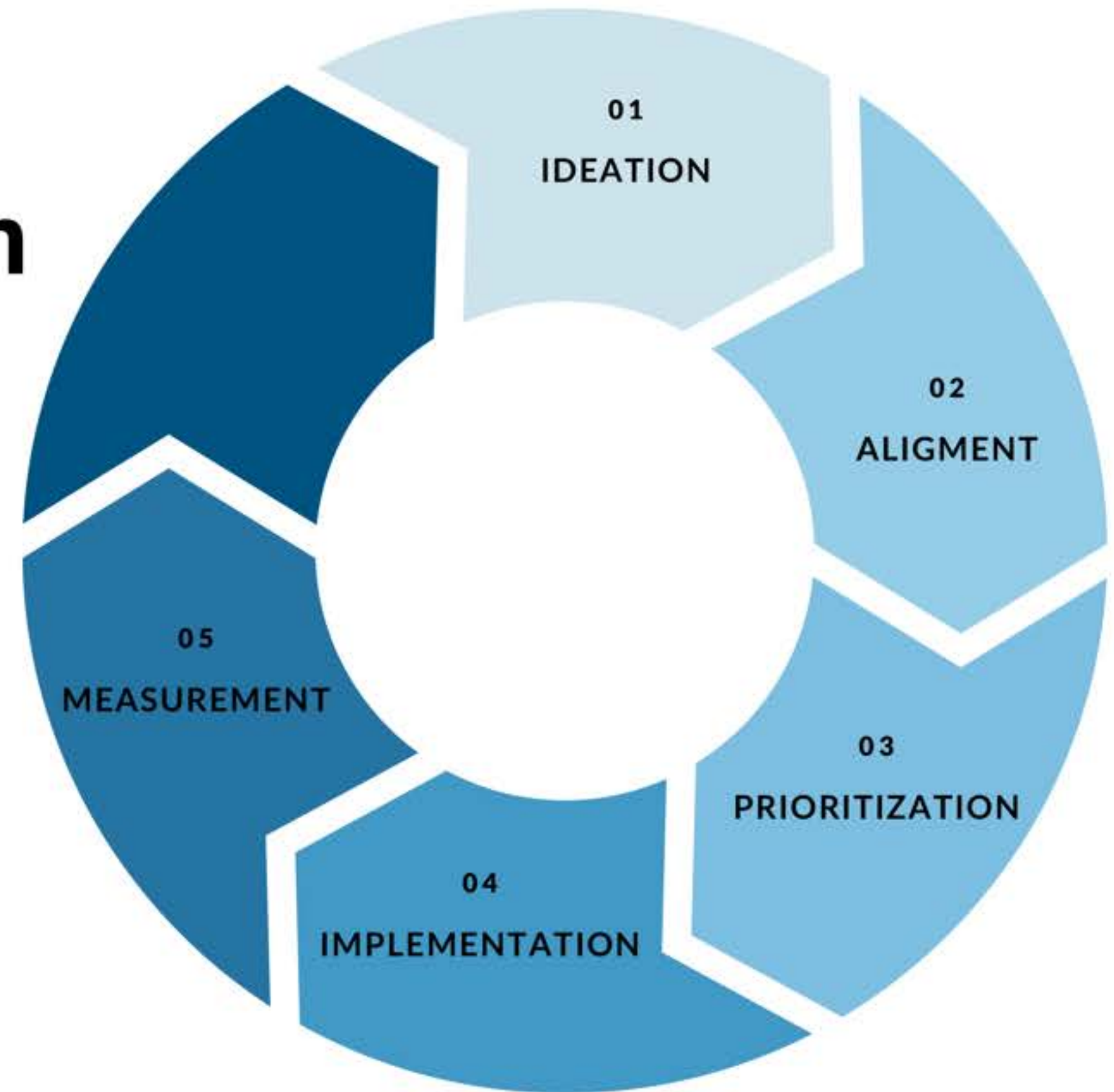
Automation Compass Features for Step 4:

- ✅ Opportunity Pipeline
- ✅ Widgets in Dashboard
- ✅ Opportunity Information

Step 5: Measure Results that Increase Satisfaction

Measuring results ensures that the solution achieves desired outcomes, provides expected benefits, and enables continuous improvement. It also increases stakeholder satisfaction and trust in the team by demonstrating that changes align with the company's needs.

Automation Compass allows you to review the benefits unlocked for your opportunities in the pipeline based on their different stages.

When processes are automated using technologies such as Business Automation Workflow (BAW), Robotic Process Automation (RPA), or monitored using Process Mining technology, the results can be imported into Automation Compass. This allows the process improvement team to update the process information for future analysis and further process improvements.

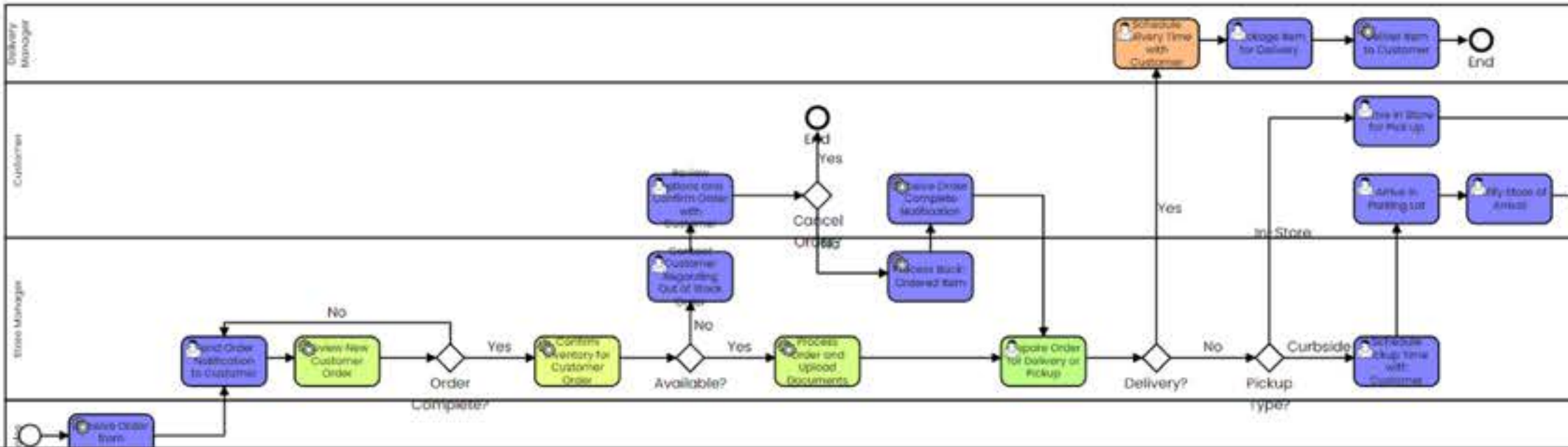01 IDEATION

02 ALIGMENT

03 PRIORITIZATION

04 IMPLEMENTATION

05 MEASUREMENT

Salient Process

Automation Compass
Features for Step 5:

- ✓ Import from Process Mining
- ✓ Import From BWL
- ✓ Simulation Engine
- ✓ Process Module
- ✓ Process Efficiency

Step 6: Drive New Ideas

Sharing the success across the company will help every department, business unit, or team get excited and start thinking about how their own processes can be improved by getting help from the process improvement team.

In the future, Automation Compass will support internal and external communities to encourage process improvement, provide visualization across the business and find precedents for justifying new improvements in your own team.
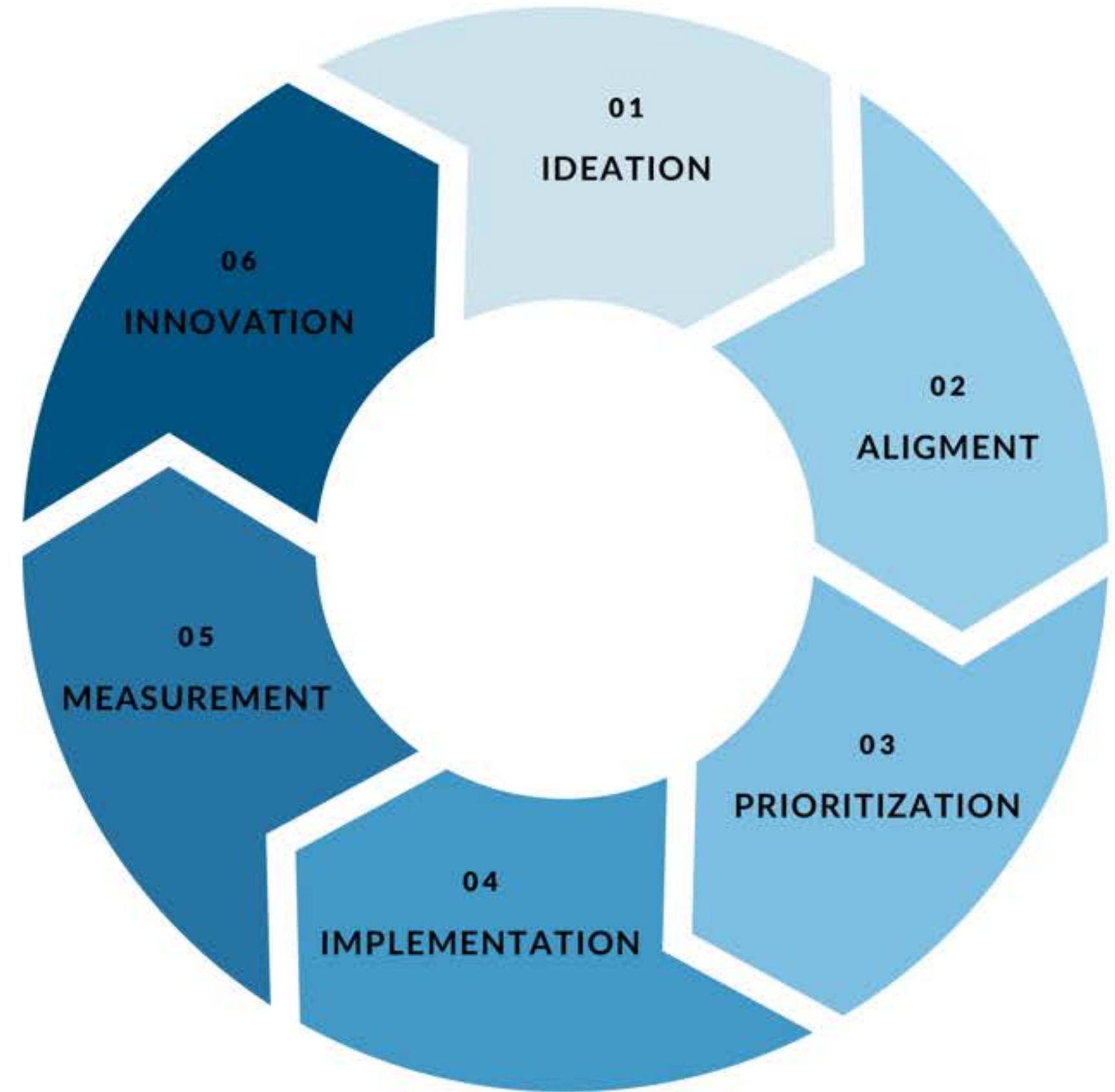
Name		Phase	Automation alignment	Created By	Yearly Total Bene	NPVR	Source
Indirect Lending Process		Idea	Workflow	Valeria Romero	$382,000	$272,500	Documentation
Improve Payroll Processing		Idea	Workflow	Valeria Romero	$134,000	$61,905	Employee
Automate Expense Approval		Idea	Decisions, RPA	Valeria Romero	$200,000	$128,571	Documentation
Automate Credit Request Process		Idea	Decisions, Workflow	Valeria Romero	$180,000	$96,154	Regulation
(Demo) Invoice Processing		Idea	RPA, Workflow	Valeria Romero	$256,582	$126,582	Simulation
(Demo) HR Onboarding		Idea	Workflow	Valeria Romero	$55,000	$34,314	Employee
Manage Resilience Business and Risk		Review	AI/ML, Decisions	Valeria Romero	$178,000	$84,762	Analysis
Automate Invoice Intake		Review	RPA, Workflow	Valeria Romero	$160,000	$90,476	Employee
(Demo) Accounts Payable Process		Review	RPA, Workflow	Valeria Romero	$101,328	$63,725	Simulation

Automation Compass Features for Step 6:

☑ Opportunity Pipeline

☑ Opportunity Stages

☑ Opportunity Module

The Flywheel Concept

It takes a lot of energy to get the wheel moving, but once it starts to spin, the momentum builds.

The Framework

The goal is to deliver quick wins and start to spin the flywheel that will help the team become a partner that makes things happen for the business.

The Continuous Improvement

It consists of six interconnected steps that work together to drive process improvements.

We know getting started is hard, but you already took the first step. Let Automation Compass be your GPS for your hyperautomation journey.

Thank you

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Request a Free Trial

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Salient Process
Your process. Our passion.