

# TRENDS AND PREDICTIONS IN PROCESS EXCELLENCE 2022

Why customers and employees are dictating organizations' approaches to processes and transformation strategies



## Inside

- > Maersk's initiatives to provide flexibility for a hybrid workforce
- > Why companies need to ensure they provide digital communications channels to their customers
- > Why data and low-code will be game-changers for process-oriented departments in 2022

Brought to you in association with

# Introduction

Should the Covid-19 pandemic continue into a third year, organizations will have to continue to find new and innovative ways to navigate their way through new waves and constant disruptions. Expectations from both customers and employees have evolved since the start of the pandemic in 2020 and while the former will demand options for interacting with companies remotely, the latter will want flexible working options.

To meet these expectations, companies will have to scale and reengineer. Maureen Terralheiro, VP back-office operations at A. Farber & Partners, advises: "Organizations should avoid reverting to old and obsolete processes – further digitization, reviewing non-value-added processes and automation solutions will all be key enablers to supporting future process upgrades."

This *PEX Network* report outlines predictions for organizational priorities in 2022, along with top challenges businesses can expect to face and technologies that will help them move forward. With insights from experts from Maersk, Eli Lilly & Co., Twitter, Siemens Gamesa, PSCU, JP Morgan Chase & Co., Unilever, LEGO, Quadient and Nintex, the report provides advice on how best to approach 2022 and overcome the unique challenges the next 12 months could present.



## Contents

- 3 2022 as the year of stabilization
- 4 The need to ensure strong processes for employee satisfaction and customer retention
- 6 Automation, data and low-code as game-changers

**"We need to tweak and understand how we stabilize our ways of working, partnerships, collaborative environments and move forward in the best way that suits the business and its employees."**

**Andrae Kirkland**

Senior program manager at Twitter

The past 12 months saw shifts from 2020 in ways of working and digitization strategies. As revealed in *PEX Network's 2021 trends and predictions report*, 2020 was very disruptive for many industries and it renewed the focus on business processes for companies to operate as efficiently as possible. In 2021, digital transformation was seen as the top solution businesses were looking to invest in, as revealed in *PEX Report 2021*.

In 2022, organizations will look to drive flexibility and define their strategy around bringing employees back to the office, which will be, according to Vineet Mehra, general manager and product head of OTC at Maersk, its "biggest focus". At the logistics company, leadership teams are looking to bring teams back "in a safe environment that fosters productivity while delivering to customers and partners more seamlessly".

Maersk has launched various end-to-end connected workflows for process management during the pandemic. These include a credit evaluation workflow where analysts and approvers can work from both home and in-office, and a cash application workbench solution to look at how best supervisors can allocate work and monitor the productivity of their teams by using simple tools.

Companies will try and define what the 'new normal' looks like for them, some two years on from when the pandemic began. It is currently unclear whether they are going to re-establish what they were doing prior to the pandemic, or whether the lessons they learned will create a new normal, as explains Garret Etgen, senior director at Eli Lilly & Co.

"We are seeing this trend toward not rushing into the future and have it being a free-for-all, that we need to ground ourselves in some of the things we had prior to the pandemic," he says.

While this uncertainty might be driving anxiety for organizations, there is an opportunity for PEX practitioners to help. Andrae Kirkland, senior program manager at Twitter, notes: "2022 will be about stabilization. We need

to tweak and understand how we stabilize our ways of working, partnerships, collaborative environments and move forward in the best way that suits the business and its employees."

Companies implemented short-term solutions essentially as band-aids, explains Nicole Dwyer, senior vice-president, intelligent communication automation portfolio strategy at Quadient.

Organizations now need to work on ensuring smooth processes for disparate teams as not everyone will feel comfortable returning to the office, with some employees having moved cities during the Covid-19 pandemic. From a process standpoint, companies will have to make sure they create workflows and manage handover activities between remote and in-office teams.

The LEGO Group is embracing what Peter Evans, its former director of service excellence calls the "Best of Both", where freedom is given to work from home with a requirement to be in the office three days per week. He explains: "We feel that the social elements of working and human interaction are what has made us powerful and we want to keep that."

The employees opting to work remotely full time are bringing a unique challenge for companies who are used to having everyone in a central location where they can collaborate in-person and have easy access to subject matter experts, according to Matt Spears, principal consultant at Nintex.

"The workforce is disparate and not as connected as it once was to institutional knowledge – a lot of our customers are solving for this by investing in process management and making up-to-date process standards digitally accessible to their entire workforce," he says.

The next section of this report delves into the need for strong processes for employee and customer retention.



# The need to ensure strong processes for employee satisfaction and customer retention

While there has been much made of the so-called "Great Resignation" in the second half of 2021, Eli Lilly & Co.'s Etgen sees an opportunity to "reshuffle the workforce" with teams able to work from everywhere without impacting productivity.

At Siemens Gamesa, a lot of focus has been placed on the onboarding process to engage new employees. Onboarding processes have been adapted to "working from anywhere" and IT hardware is now sent to employees' homes to support their remote-working environment, something that have never been done before. Mark Ghibril, the company's global vice-president – head of regional CIOs and user engagement experience center, says: "We are redefining what processes look like to try and make them as smooth and engaging as possible."

Talent retention is a key challenge that Mehra foresees in 2022 and this is especially true at a time where employees want to do value-based processes as opposed to transaction-only ones. He explains: "It is important for us to put programs in place for people to stay connected and stay challenged in the company's journey."

One such program launched in 2021 is called "Launch-Pad", which aims to advance top talent in their career journey by having them do job assignments across multiple functions that focus on business and customer outcomes. Such initiatives will continue in 2022 to keep employees motivated, increase their learnings and focus on delivery outcomes.

Engagement is key for employees who, according to Michael Dove, VP center of process excellence at credit union service organization PSCU, are "working more hours and not taking breaks, not having those 'water cooler' conversations that maintain good balance and positive employee engagement".

"We have found that we need to look at strong process-related business intelligence to understand not only efficiency and effectiveness, but also to guard against poor resource management," he explains.

Employees who are not happy with manual repeatable tasks may go to a competitor, which Quadient's Dwyer, has seen happen a lot throughout the pandemic.

Organizations may also have to build headcount reduction into their plans in 2022 even if they are experiencing growth. It is seen by Dwyer as "a big challenge that companies will have to overcome, which will reinforce the need for process optimization". Solutions focusing on the exchange of information have resulted in improving both morale and performance.

Businesses that have optimized their processes for remote operations will come out "on top" and will set the precedent for operations in the future to ensure customer retention, which Dwyer dubs as "the new growth".



## Embrace digital to thrive

While during the pandemic customers were hesitant to switch companies due to uncertainty, they now have a greater opportunity to do so now that most communication channels are digital. To avoid losing customers, Dwyer advises: "The business environment has shifted and companies need to foster relationships with their customers and communicate with them. If a business is not ready to facilitate an easy exchange of information with their customers, I believe we will end up seeing a 'customer resignation'."

Maneesh Subherwal, executive director of business transformation, commercial bank at JP Morgan Chase & Co., advises organizations to focus on customer journeys over product journeys and drive iterative validation with users. He recommends: "Focus on improved product and design capabilities, enable talent autonomy, and create a product and user-centric organization."

The LEGO Group's Evans agrees and explains that the company's global business services (GBS) has strengthened and grown a capability in this area. He explains: "We are seeing the power of this on a daily basis with colleagues at all levels making a difference

## » The need to ensure strong processes for employee satisfaction and customer retention

to our service experience and our net promoter score levels are constantly rising.”

The need for digital communication channels is especially true in the public sector in the US, where some offices have restricted hours and set limited numbers of constituents allowed in. Providing knowledge to these constituents about specific requests they have made, almost to the point of self-service, is a unique concern for the sector and big driver for transformation according to Nintex’s Spears.

“They want to build up their websites to provide more explicit knowledge related to processes constituents depend on,” he says. “Digital process assets can help close the gap created by limited office hours and other procedural changes.”

A key challenge in 2022 may be around the adoption of digital offerings by customers, which Mehra has experienced. He notes: “The digital payment channel that we launched in 2020–21 has a 40 per cent adoption across customers currently in a few locations, and we are aiming for 50 to 60 per cent globally in 2023 and beyond.”

To drive digital adoption, companies will have to tackle process standardization. Maersk has launched an initiative to look at processes in deeper spectrum in 2022 and drive a process standardization index (PSI) to measure the complexity of particular customer-centric processes.

The next section of this report will look at the technologies that will make a difference in 2022.

**“The workforce is disparate and not as connected as it once was to the organizational knowledge – a lot of our customers are looking to share it by making process documentation tangible for everyone who needs it.”**

### **Matt Spears**

Principal consultant at Nintex



# Automation, data and low-code as game-changers

The hybrid work model has highlighted the importance of effective BPM and workflows that support strong customer-centric processes, and technology now drives productivity and experience.

PSCU's Dove states: "We are now seeing hybrid technologies that work well in person and virtually, with the ability to have process automation along with attended process steps that require cognition that only a human can manifest."

The integration of customer behavior automation is seen as a big trend for 2022 by Michel Ramos Mellis, global business transformation director at Unilever, with organizations being more outside-in driven. He explains: "Because of technology and processes in place, companies can now read consumer behavior, and this will dictate automation strategy and opportunities in order to provide a personalized experience to every customer."

Both the LEGO Group's Evans, and Twitter's Kirkland foresee a deeper and scaled exploration in terms of understanding where the process gaps and opportunities are, through process and task mining in 2022. While there are a lot of talks around technology, they both recommend companies not to lose focus on the processes as a starter and layer technology on top. Eli Lilly & Co.'s Etgen echoes this and adds that "one of the worst things to do is to put some sexy new technology on top of a bad process".

## Top five solutions and methodologies organizations are investing in in 2022

- 1 Data analytics/business intelligence
- 2 Workflow automation
- 3 Digital transformation
- 4 AI
- 5 Behavioral/employee engagement

Source: PEX Report 2022

Nintex's Spears agrees that going back to basics before implementing technology is essential. He says: "If we don't slow down and take time to understand our processes first, we risk technology driving our operational decisions instead of supporting them. Slowing down and understanding what we do and how we do it is key to the proper utilization of technology."

Another key element is data. It is being increasingly collected by companies, with data analytics and business intelligence being the top solution organizations are investing in in 2022 as revealed in [PEX Report 2022](#). Quadient's Dwyer believes that these types of solutions will be crucial for companies.

She explains: "Technology that helps provide analytical and intelligent data to the business would be really useful to help identify which customers to continue to focus on and allot the most effort that will help grow the business."



## Revamp old frameworks

Data is a key focus for Maersk. At the end of 2020, an initiative was launched to revamp its fragmented technological landscape and bring its more than 2,000 different application legacy systems, serving different processes, customers and employees, onto 15 world-class platforms. To achieve this, the company focuses on three core areas: a "system of records" to record all transactions, a "system of engagement" for interactions between employees and processes and a "system of analytics" for conducting predictive and descriptive analytics on the first two areas.

The future vision for the logistics company is to embed artificial intelligence (AI) and machine learning (ML) to achieve predictions and an initiative is in place to take customer behavior analytics to the next level for cash collections. It will help see whether a customer will become riskier, meaning at risk of bankruptcy or if they are part of an industry particularly affected by the pandemic. Mehra also sees a lot of companies using these technologies for chatbots and messaging

services to exchange information with customers and employees.

Solutions focused on citizen developers and the line of business are considered key for Spears in 2022. He explains: "From a process management perspective we need agile tools that allow a non-process-trained person to transfer their subject matter expertise in a usable process asset."

Although this technology is not widely known across industries and "almost goes against the way organizations are built", it will be a key asset for decentralized teams.

"The old model of a centralized IT department controlling all technology implementations will not be fast enough for what is needed in 2022," Spears says.

In the coming years, Siemens Gamesa's Ghibril sees new areas and skills coming in that previously did not exist, which are starting to overflow into the area of process excellence. He says: "I believe it is going to be very fluid in 2022 with new tools and programming languages appearing that will replace automation software."

While Evans see the democratization of robotic process automation (RPA) advancing, he foresees "amazing opportunities from an OPEX point of view", where there is a deeper involvement from organizations into traditional OPEX toolkits. "Things are moving much faster than had been the norm in our business and I am looking forward to seeing that happen and continue over the next year or two," he says.

Mehra believes in the logistics sector in particular, it is "imperative" to reorganize the operational workforce around customers and business needs. He explains: "At Maersk we constantly challenge the status quo to revamp how best we serve our partners, which brings the need for a new operating style, upskilling, a center of excellence setup and a look at business metrics that drive outcomes".

**"The business environment has shifted and companies need to foster relationships with their customers and communicate with them. If a business is not ready to facilitate an easy exchange of information with their customers, I believe we will end up seeing a 'customer resignation'."**

### **Nicole Dwyer**

Senior vice-president, intelligent communication automation portfolio strategy at Quadiant

As we approach potentially another year dominated by the Covid-19 pandemic and the risks associated with news variants and restrictions, organizations need to have visibility over their processes, use tools and technologies, and optimize them to stabilize ways of working. By focusing on ensuring employee and customer retention through strong processes, companies will have an advantage over their competitors and set themselves up for growth.

## Top three takeaways from this report:

- > There is an opportunity for companies to define their strategy around their ways of working.
- > Companies need to ensure strong processes are in place to cater to all employees and communicate with clients.
- > Although technology is moving forward, businesses need to take a step back and focus on the processes.



# About PEX Network



PEX Network is a leading process and operational excellence platform that provides premium content and insight from the world's foremost thought leaders online and across our industry-leading events.

With more than 160,000 members, PEX Network is the largest and most established community of process and operational excellence professionals in the world.

@PEXNetwork\_Team



PEX Network



If you are interested in **becoming a PEX Network contributor**, please get in touch with our editor Alice Clochet at [alice@pexnetwork.com](mailto:alice@pexnetwork.com)



If you would like to be **positioned as a thought leader, promoting your offering to PEX Network's extensive database** of process and operational excellence experts and professionals through reports published throughout the year, please get in touch with our head of partnerships Ed Wells at [edward.wells@iqpc.co.uk](mailto:edward.wells@iqpc.co.uk)



Position yourself as a **thought leader**  
Build **brand awareness**  
Generate **direct leads**

Download PEX Network's media kit



**165,000+**  
Opt-In Members



**55,000+**  
Social Followers



**10,000+**  
Event Delegates



**2.2+**  
Global Database