ASSIGNMENT 1 – INFORMATION AND REPORT SUBMISSION LINK

INF30035 – Business Process Analysis

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Executive summary

This report critically examines the current business processes at Swinburne Guru Consulting (SGC) and identifies key areas for improvement to enhance operational efficiency and service quality. Three critical issues—inefficient coach matching and scheduling, delays in the invoicing and payment process, and unclear role responsibilities—are identified as major obstacles. These issues result in bottlenecks, task duplication, and delays, which impact overall productivity and customer satisfaction.

To address these challenges, the report proposes best practices including resequencing to streamline coach matching, triage to expedite the invoicing process, and split responsibilities to clarify staff roles and reduce task overlap. These solutions, grounded in business process management (BPM) principles, offer a structured approach to improving efficiency, reducing unnecessary rework, and enhancing both client and employee satisfaction.

By implementing these strategies, SGC can not only resolve its current operational inefficiencies but also create a more adaptable and scalable system for future growth. The recommendations emphasize a clear, efficient workflow, better resource allocation, and improved communication, all essential for maintaining a competitive edge in the coaching industry.

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I. Introduction

Background

In today's rapidly changing business landscape, organizations are increasingly recognizing the critical importance of efficient and effective business processes as key drivers of success. The significance of optimizing these processes is well-documented in several studies, highlighting their role in enhancing overall business performance. According to Pritchard and Armistead (1999), redesigning and developing business processes has become one of the most essential strategies for businesses looking to boost customer satisfaction, enhance operational efficiency, and maintain a competitive edge in the marketplace.

Businesses may manage, redesign, and redevelop their processes by utilising crucial tools like Business Process Management (BPM) and Business Process Modelling & Notation (BPMN). Dumas, Rosa, Mendling and Reijers (2018) define BPM is a '*body of methods, techniques and tools to discover, analyze, redesign, execute and monitor business processes'*, which provides a systematic approach to improving an organization's workflows, making them more efficient and capable of adapting to change. The author also emphasized the importance of BPMN, which is a standardized process modeling and graphical notation, and how it allows businesses to visually depict their processes, facilitating better understanding, communication, and analysis. By using BPMN, organizations can clearly map out their existing processes, identify inefficiencies, and propose more streamlined workflows that align with their strategic goals (Dumas et al., 2018).

Understanding and analyzing current process issues is a fundamental step in process development. By identifying bottlenecks, inefficiencies and areas for improvement, it allows organizations to make informed decisions on how to redesign processes to better align with strategic objectives (Lima, 2023). Without a thorough analysis of existing processes, any redesign attempts might overlook critical areas that need attention, resulting in suboptimal outcomes. In this context, BPM and BPMN play an essential role in ensuring that business process redesigns are both effective and aligned with the long-term objectives of the organization.

Purpose of the Assignment

The purpose of this assignment is to critically assess Swinburne Guru Consulting's (SGC) current business processes and pinpoint key issues that may hinder operational efficiency. Through analysis of these problems, the assignment aims to propose practical solutions, accompanied by a set of best practices that can be applied to improve bottlenecks, reduce repetitive procedures, and ensure better resource distribution within the company. Ultimately, the objective is to provide SGC useful insights that can help enhance its operational efficiency and customer satisfaction.

For SGC, considering Business Process Management (BPM) is particularly crucial as it offers a structured approach to analyzing and improving their operations. As BPM enables organizations to redesign, execute, monitor, and optimize business processes, the implementation of it within SGC can ensure that their processes are not only efficient but also adaptable to changes in the business environment. Moreover, BPM fosters continuous improvement (Dumas et al., 2018), helping SGC to regularly assess and refine their processes, thereby enhancing overall productivity and service quality.

The effectiveness in delivering the purpose of this assignment is largely reliant on how this assignment is structured. First, an analysis of SGC's current business processes is given, emphasising the main problems and difficulties. Next, three critical process issues are discussed in detail, with a focus on their impact, potential best practices, and the opportunities for improvement. The assignment concludes with suggested ideas for redesigning the identified processes, accompanied by an analysis of the possible advantages and difficulties linked to these modifications.

Data Collection Methods

This report's analysis is based on multiple data collection techniques, including case study analysis, where a thorough examination SGC's case study is provided, offering detailed information about the company's current processes and challenges; academic literature, where academic journals and publications are utilized to provide theoretical frameworks and empirical evidence supporting our analysis; and best practices, where standard practices in business process design and improvement are considered and compared to propose the best possible solutions for SGS. This approach guarantees that the analysis is based on both theoretical and practical knowledge, offering a thorough comprehension of the problems at hand.

II. Statement of Problems

Overall analysis of the current process

To identify prospective problems and areas of concern, it is crucial to understand SGC's current business processes before diving into the examination of the top three crucial issues. A thorough understanding of these existing processes will help in pinpointing inefficiencies, bottlenecks, and other challenges that may hinder overall operational performance (Andersen, 2007). Additionally, this initial research will serve as a basis for recommendations for enhancements based on industry best practices for SGC's business process management.

In the case study, SGC operates with five main business processes: client intake, coach matching and scheduling, assignment verification, follow-up and quality control, and invoicing and payment. Many issues have been identified in different stages of the process:

1. **Client intake**: Managed primarily by the receptionist, which might lack standardisation and consistency across various contact channels. Based on the case study, the client intake process seems to vary depending on how the client contacts SGC, such as via phone, email, in-person, through Emily's LinkedIn accounts, or other sources.
2. **Coach matching and scheduling**:
    a. The coach matching task is handled by the coaching specialist, Ahmed, which is manual and potentially time-consuming. Ahmed has to review the available coaches, their specialties, and their schedules to find the best fit for each client. If coaches within the company are not available, Ahmed arranges a recruitment process, potentially leading to other delays. If a suitable coach is not found initially, the process loops back to Ahmed, causing inefficient use of time and resources.
    b. Similarly, the coach scheduling process is managed by Madeleina, the scheduler, which involves contacting coaches to arrange appropriate times, then matching that with clients' schedule, and confirming the schedule to the client. This current process is inefficient and prone to delays as the number of coaches and client requests grows.
3. **Assignment verification:** Usually done by Madeleine but sometimes assigned to someone else. In case a coach fails to confirm the assignment, the company will contact the client and offer other course of action. Once again, this is usually done by Ahmed but occasionally by other members. This shows a lack of consistency and role ambiguity in execution and may benefit from a more structured approach.
4. **Follow-up and quality control:** Responsible by Madeleine, this process may lead to delays in receiving both client and coach survey forms.

5. **Invoicing and payment:** Managed by the part-time bookkeeper, this process is highly inefficient and potentially detrimental to cash flow due to long payment terms and unclear guidelines on coach payments in case that a customer fails to make payments.

Based on the analysis above, it is clear seeing that the following three issues: **1) Inefficient coach matching and scheduling**, **2) Invoicing and payment process**, and **3) Unclear role responsibilities within the organization**, make up most delays and inefficiencies within SGC. Addressing these critical problems would significantly improve SGC's operational efficiency, client satisfaction, and its competitiveness in the coaching industry.

The critical issues

This section discusses the three identified issues that are critical for the operational efficiency of GSC and their impacts on the business.

1. **Inefficient coach matching and scheduling**

As mentioned, the current process of matching and scheduling coaches with clients is manual, time-consuming and prone to inefficiencies. It follows a largely sequential structure, starting with coach selection and followed by scheduling. Ahmed, the coaching specialist, manually searches for suitable coaches within the company based on customer requirements. If no suitable coach is available, he initiates a recruitment process, interviews potential candidates, and selects a new coach. After hiring, the process proceeds to scheduling and verification, which often impose a risk that the coach and client's schedules may not align, or one party may fail to confirm the assignment. In that case, the assignment returns to Ahmed to find another coach, which potentially generates an unnecessary loop and repeated communication in the process that further delays completion.

This process may cause major delays in responding to customer enquiries and may even cost the company business. It also places an excessive workload on the coaching specialist and scheduler, resulting to multiple rework tasks, which, according to Love and

Edwards (2004), refer to '*the unnecessary effort of redoing a process or activity that is incorrectly implemented the first time*.' As a result, this issue creates unnecessary loops, duplications, bottlenecks, and low productivity, negatively impacting the business (Love & Edwards, 2004).

Additionally, as Ahmed is familiar with the coaches and what they do, sometimes he relies on his personal knowledge to find appropriate coaches. This current manual selection approach may cause certain coaches to be overlooked, which would result in an uneven distribution of work. By addressing these inefficiencies, SGC can improve service quality and consistency, enhance client and coach retention, and strengthen its reputation in the market.

2. Invoicing and payment process

The payment and invoicing process at SGC faces several inefficiencies, primarily due to poor task sequencing and unnecessary rework. These process-related issues slow down payments, create bottlenecks, and can negatively impact the cash flow and coach compensation of SGC. These delays and inefficiencies arise due to the process's multiple steps, dependencies, and manual interventions.

One significant issue is the rigid sequence of tasks in the payment process, where coaches can only be paid after the client has made a payment. This dependency causes bottlenecks when clients delay their payments, resulting in late compensation for coaches. This approach is therefore subject to client behavior, making the entire process vulnerable since it depends solely on the client's payment to initiate the coach's payment. This could discourage highly skilled coaches from continuing their association with SGC if they are not compensated promptly. Such delays in payment, according to Frey (2002), can lead to reduced motivation, lower performance, or even decreased in employee retention rates, ultimately affecting the company's service quality and reputation.

Unnecessary rework is another concern within the current process. For instance, the bookkeeper must manually follow up with clients who have not paid after 30 days. The issue is escalated to a manager and ultimately sent to a debt collection agency if the client continues to delay payment. This repeated handling of the same issue not only consumes time but also leads to unnecessary effort that could be avoided with better designed solutions. Lastly, the case study does not specify how coaches are paid if a client fails to pay after 90 days. This lack of information suggests major financial risks for both SGC and its coaches, potentially impacting SGC's cash flow, or even leading to legal-related risks. By addressing the sequencing of tasks and inefficient rework, SGC can facilitate faster payments and enhance client and coach satisfaction.

3. Unclear role responsibilities within the organization

The case study reveals several instances where roles overlap is reassigned based on workload with multiple staff members performing the same task, such as contacting clients or verifying assignments. Schmidt et al. (2014) point out that role uncertainty negatively impacts job satisfaction and performance, often leading to stress, depression, and anxiety due to the ambiguity. As a result, this lack of role ambiguity in SGC leads to confusion, inefficiencies, and service gaps, as employees may either duplicate tasks or fail to finish important steps due to the assumption that someone else is handling it (Bauer & Simmons, 2000). For instance, the roles of Ahmed (coaching specialist), Linda (receptionist), Madeleine (scheduler), and even Emily (the business owner) often overlap in key activities such as verifying assignments, scheduling, and following up with clients. When Madeleine is too busy, Ahmed or Linda is expected to step in, but without clearly defined procedures for how and when these tasks should be assigned. This causes confusion regarding who is ultimately responsible for ensuring that each task is completed accurately and on time. This can lead to double job handling, where the same task might be performed by more than one person, and overlooked tasks, where important steps may be missed due to confusion, wasting valuable time and resources. Implementing well-defined role responsibilities at SGC could mitigate these issues, enhancing accountability, boosting productivity, and improving overall employee satisfaction (Bauer & Simmons, 2000).

III. Best Practices and Future Improvements

This section proposes a set of Business Process Design Best Practices/Heuristics to address and improve the key issues identified within SGC's operation. For each major problems, two best practices will be compared and discussed in relation to how they can enhance SGC's business process efficiency. Additionally, a redesign and plan for process improvement will be outlined at the end of this section. The best practices/redesign heuristics as outlined by Dumas et al. (2018) will serve as a foundation for the discussion, guiding the identification of suitable solutions and their potential impact on SGC's processes.

1. **Inefficient coach matching and scheduling**

SGC's coach matching and scheduling process is manual and prone to delays, often leading to unnecessary loops when coach and client schedules do not align. Two suitable redesign best practices from Dumas et al. to address this issue are 'Resequencing' and 'Parallelism' (both come from Business Process Behavior Heuristics):

Resequencing

Resequencing involves changing the order of tasks to improve process efficiency (Dumas et al., 2018). In SGC's case, instead of first selecting a coach and then checking availability, **the scheduling check should happen earlier** in the process. This means gathering coach availability before matching them to a client. By adjusting the sequence of checking availability earlier, Ahmed can avoid repeated steps when the initial match fails due to scheduling conflicts.

The approach helps prevent unnecessary loops, reduces rework, saves cost, and shortens delays (Dumas et al., 2018) by aligning coach-client schedules earlier. However, it might necessitate more thorough planning and communication up front. For instance, Ahmed would need to communicate with all parties to ensure availability is checked before making matches, which could lead to increased workload in gathering the required information.

Parallelism

Different from resequencing, parallelism allows tasks to happen concurrently (Dumas et al., 2018). With both parties at the same time, Ahmed may match coaches with clients and verify their availability before moving to scheduling process. This parallel approach would eliminate the need for a purely sequential process, speeding up overall scheduling.

While the approach helps faster process completion, reduce waiting times and rework tasks, it requires more resources and increases the risk of errors in handling multiple tasks.

For comparison, resequencing is ideal for reducing unnecessary loops, ensuring smoother workflow with fewer resources. It simplifies the process by shifting scheduling checks to an earlier stage, preventing the need to repeat steps later. Parallelism, on the other hand, could potentially speed up the process but may demand more personnel or tools. For SGC, **resequencing** would likely be more practical, addressing the core issue of delays and rework without adding complexity, though **parallelism** could be implemented when speed is essential, and resources are available.

2. Invoicing and payment process

As mentioned above, the major problems within the invoicing and payment process are the prolonged time it takes in processing payments and exceptional cases, such as client fails to make the payment, which may lead to delays and incomplete of the assignment. As a result, 'Triage' (from Business Process Operation Heuristics) and 'Exception' (from Business Process Behavior Heuristics) may be a good fit to address the problem.

Triage

In the context of invoicing and payment, triage could involve splitting the invoicing process into different categories based on the complexity or value of the invoice, as it helps to improve process quality by handling different cases in the most suitable way (Reijers & Mansar, 2005). For example, in a customer service process, incoming requests could be triaged into "simple inquiries," "technical issues," and "billing problems", each handled by differently skilled teams.

This approach allows SGC to allocate resources more efficiently by ensuring that simpler, standard invoices are processed quickly and fast-tracked, while complex or high-risk cases receive the attention they require. The approach therefore enhances the quality of the outcomes, when specialized cases are handled by specialized procedures. However, it may require effort to define which invoices are considered simple or complex and establish criteria for triage. If misclassified, complex cases could be handled by staff not equipped to manage them, leading to delays or errors (Reijers & Mansar, 2005).

Exception

As explain by Dumas et al., exception helps improve process efficiency by separating the handling of exceptional cases from the normal flow. In SGC's case, **Exception** can be used to design the process to handle typical invoices in a streamlined manner, while exceptional cases (e.g., missing payment details or late payments) are routed to a separate, specialized team or procedure. Therefore, regular invoices are processed normally without disruption, while exceptions are flagged and handled independently, with well-defined procedures for exceptional cases. According to Reijers and Mansar (2005), this approach ensures that any irregularities do not slow down the entire process. The authors also argue the potential drawbacks of this heuristic, which may complicate processes due to multiple paths, increase risk of misclassification, and require additional staff.

For comparison, both practices aim to improve the overall efficiency of the invoicing and payment process but in different ways. **Triage** focuses on matching tasks to resources, while **Exception** ensures that normal operations are not disrupted by irregularities. Depending on the nature of SGC's invoicing challenges, they could apply either strategy, or even combine them, to streamline the process effectively.

3. Unclear role responsibilities and potential bottlenecks

Considering SGC's problem of unclear role responsibilities and potential bottlenecks, two suitable best practices from Dumas et al.'s redesign heuristics can be Split responsibilities and Case manager (both from Organization heuristics):

Split responsibilities

This heuristic involves reducing or eliminating shared responsibilities for tasks between people from different functional units (Dumas et al., 2018). At SGC, tasks like scheduling, verifying assignments, and client follow-ups often involve multiple employees. By clearly delineating these responsibilities, each task would be assigned to one person without overlap. This ensures that employees know exactly what they are responsible for, eliminating confusion, bottlenecks, and delays (Reijers & Mansar, 2005). For example, Linda could solely handle client communication, while Ahmed focuses on coach recruitment, and Madeleine is responsible for scheduling. This clear division of labor reduces the risk of duplicated efforts or missed tasks due to assumptions that others are handling them. This heuristic, however, may limit the staff’s ability to shift tasks easily due to its rigidly defined responsibilities, especially when one staff may have less workload than another in certain events.

Case manager

According to Dumas et al., the Case Manager best practice assigns a single person the responsibility for managing all aspects of a case. For SGC, appointing a case manager for each client would mean one individual, like Ahmed or Madeleine, oversees all activities—from client intake to coach assignment, scheduling, and follow-up.

This approach ensures there is no ambiguity regarding who is responsible for completing each task. The case manager is fully accountable for ensuring that all stages of the client-coach engagement are completed efficiently, which prevents tasks from falling through the cracks and reduces task duplication and oversight. As a result, this approach has a positive impact on customer satisfaction (Reijers & Mansar, 2005). A case manager, however, may not always have the expertise needed for every task, leading to potential inefficiencies if they try to manage too many specialized roles.

In comparison, **Split Responsibilities** is preferable for SGC as it clearly defines roles, reducing task duplication and confusion. By assigning specific duties to each employee, such as Ahmed focusing on coach recruitment, SGC can streamline operations and leverage specialized skills. In contrast, **Case Manager** may overload one person and is less suitable since Ahmed is already dedicated to coaching and other staff members lack the same level of expertise. Thus, **Split Responsibilities** offers a more effective and scalable solution for SGC's needs. (ds)

Future Improvements and process re-design

- Map Current Processes
- Identify Inefficiencies (bottlenecks, delays, role overlap)
- Restructure: Resequencing tasks, prioritize invoices, split responsibilities
- Redesign Workflows
- Implement BPM Tools
- Train Staff
- Monitor Performance
- Continuous Improvement

IV. Conclusion

In conclusion, Swinburne Guru Consulting (SGC) faces several key process challenges that are impeding its operational efficiency and service quality. Through the analysis of its business processes, this report has identified three critical issues—inefficient coach matching and scheduling, invoicing and payment delays, and unclear role responsibilities—which contribute to the company's operational bottlenecks and workflow inefficiencies. The proposed best practices for each key issue offer actionable solutions that align with SGC's needs and can significantly improve its processes. By adopting these improvements, SGC can streamline operations, reduce rework and delays, and enhance customer satisfaction. Implementing a more structured approach to process management, such as through BPM principles, will not only address current inefficiencies but also provide the flexibility to adapt and grow in a competitive market environment.

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Appendices

Appendix A: BPMN Diagrams

1. **New Coaching Assignment main process model**

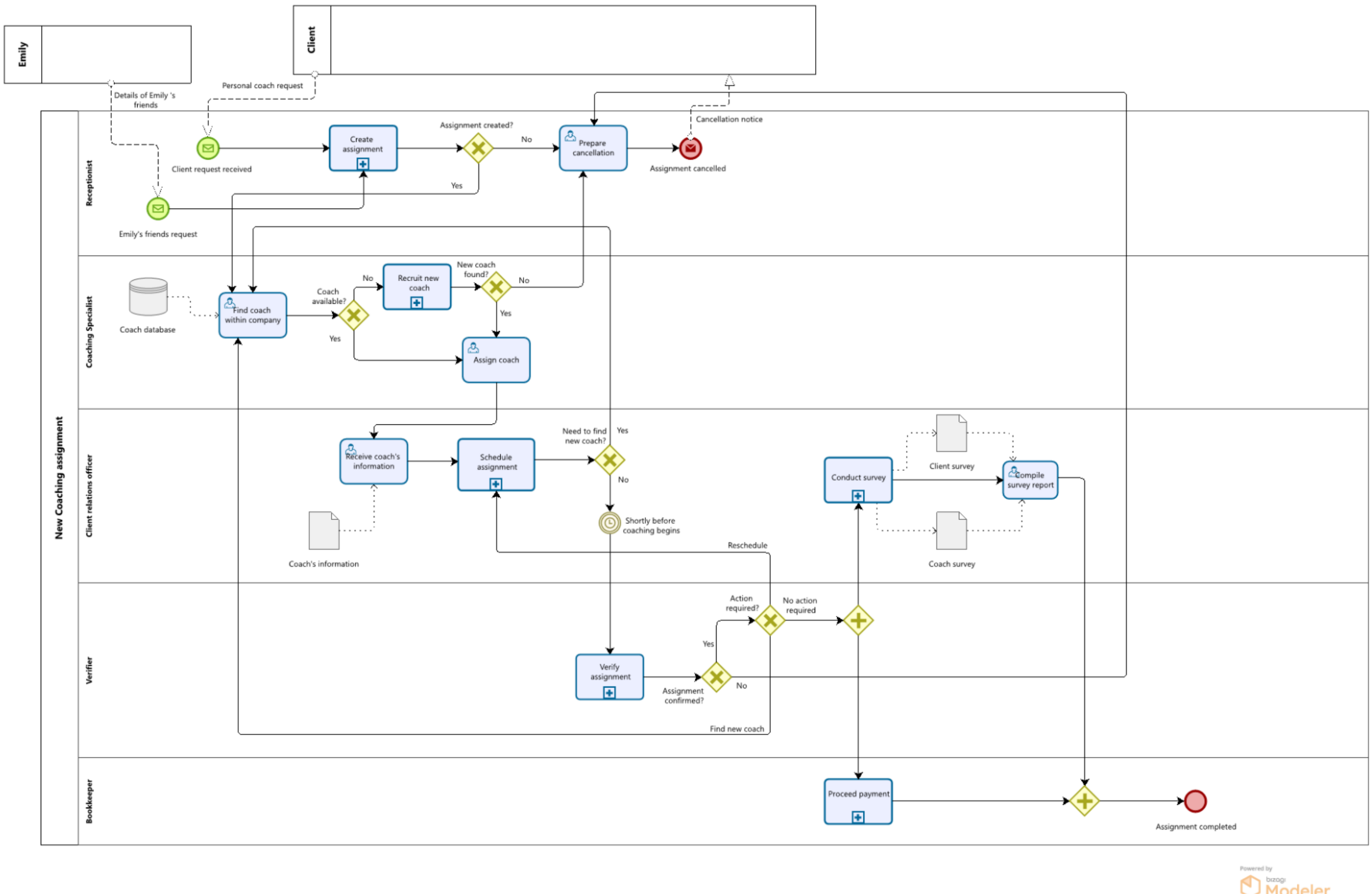

Figure 1. New Coaching Assignment main process model

Type	Tasks, Gateways, and Events Names	Brief explanation
Events	Client request received	Start event with clients sending their coach request to the receptionist
	Emily's friends request	Start event with Emily sending her friends' details
	Assignment cancelled	End event when the assignment is cancelled
	Shortly before coaching begins	Intermediate event referring to a specific time point shortly before the coaching session starts
Tasks and Subprocesses	Create assignment	A subprocess used when the receptionist creates a new assignment record
	Prepare cancellation	A task used to prepare cancellation for the 'Assignment cancelled' end event.
	Find coach within company	Once a new assignment is created, Ahmed searches the company database to find appropriate coaches based on clients' requests.
	Recruit new coach	A subprocess used to recruit a new coach when Ahmed cannot find any available coach within the company.
	Assign coach	Once a coach is found, Ahmed assigns that coach to his corresponding assignment, and then send the assignment to the client relations officer
	Receive coach's information	A task of the client relations officer, which receives the coach's information, ready for the next task

	Schedule assignment	A subprocess used to arrange times and match coaches and clients' schedule
	Verify assignment	A subprocess used to verify the assignment by requesting confirmation from both parties
	Conduct survey	A subprocess used to follow up with the clients and coaches and request for their satisfactory surveys
	Compile survey report	Once the client relations officer receives surveys from coaches and clients, she compiles them into a report
	Proceed payment	A subprocess used to handle the payment process within SGC
Gateways	Decision gateway (Assignment created?)	Used to check a new assignment is created. If 'Yes', go to next task 'Find coach within company', if 'No', go to 'Prepare cancellation'
	Decision gateway (Coach available?)	Used to check if any coach within the company is available for the assignment. If 'Yes', go to task 'Assign coach', if 'No', go to 'Recruit new coach subprocess
	Decision gateway (New coach found?)	Used after the recruitment process. If 'Yes', meaning a new coach is hired, go to task 'Assign coach', if 'No' go to 'Prepare cancellation' (as no coach is found after 2 weeks, or without client's consent)
	Decision gateway (Need to find new coach?)	Used to ask if the client wants to find a new coach after the 'Schedule Assignment' subprocess as the client and coach schedule do not match. If 'Yes', go to 'Verify

		assignment', if 'No', go to 'Find coach within company'
	Decision gateway (Assignment confirmed?)	Used to check if the assignment is confirmed after verification. If 'Yes', go to 'Action required?' decision gateway, if 'No', go to 'Prepare cancellation' task
	Decision gateway (Action required?)	After the verification process, there might be different outcomes: the assignment is verified successfully, or the client wants to reschedule with current coach, or the client wants to find a new coach. If 'No action required', which means the assignment has been successfully verified between both parties, go to next step (a parallel gateway). If 'Reschedule', meaning the client wants to reschedule with current coach, go to 'Schedule assignment' subprocess. If 'Find new coach', meaning the client wants to find a new coach, go to 'Find coach within company' task.

2. Create assignment subprocess

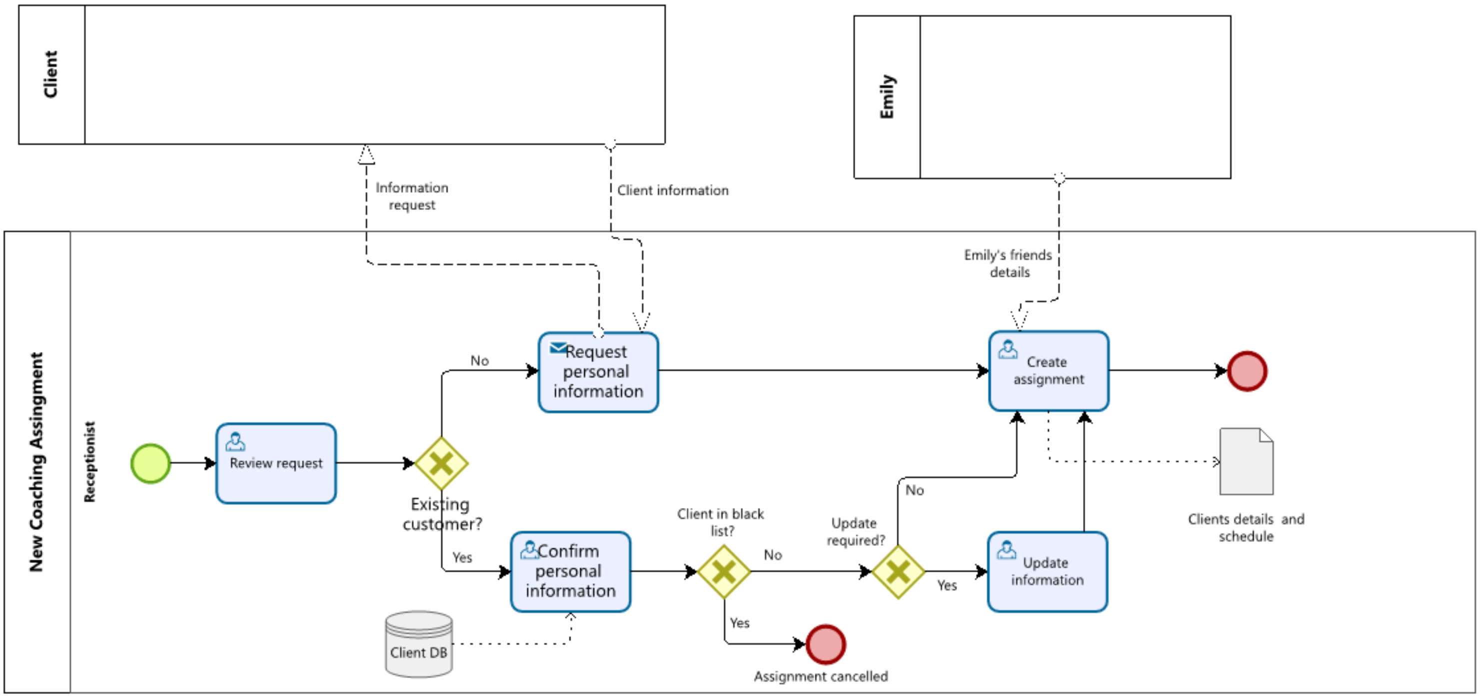

Figure 2. Create assignment subprocess

Type	Tasks, Gateways, and Events Names	Brief explanation
Events	Assignment cancelled	End event when the client is in a blacklist
Tasks	Review request	The receptionist reviews the request once she receives it from the client
	Request personal information	The receptionist request information from the client by contacting they via phone
	Create assignment	Once having the client's information, the receptionist creates a new assignment, ready

		to be sent to Ahmed to start searching a new coach
	Confirm personal information	In case the receptionist receives request from an existing client, she needs to check and confirm the information and see if updates required
	Update information	Used in case the information from the existing client needs to be updated
Gateways	Decision gateway (Existing customer?)	Check if the client who sends the coaching request is an existing customer in the database. If 'Yes', go to 'Request personal information', if 'No', go to 'Confirm personal information'
	Decision gateway (Client in blacklist?)	Check if the existing client is in the company's blacklist. If yes then cancel the assignment, if no, go to next step
	Decision gateway (Update required?)	Used to check if the information of the existing client needs to be updated. If 'Yes', go to 'Update information', if 'No', go to 'Create assignment'

3. Recruit new coach subprocess

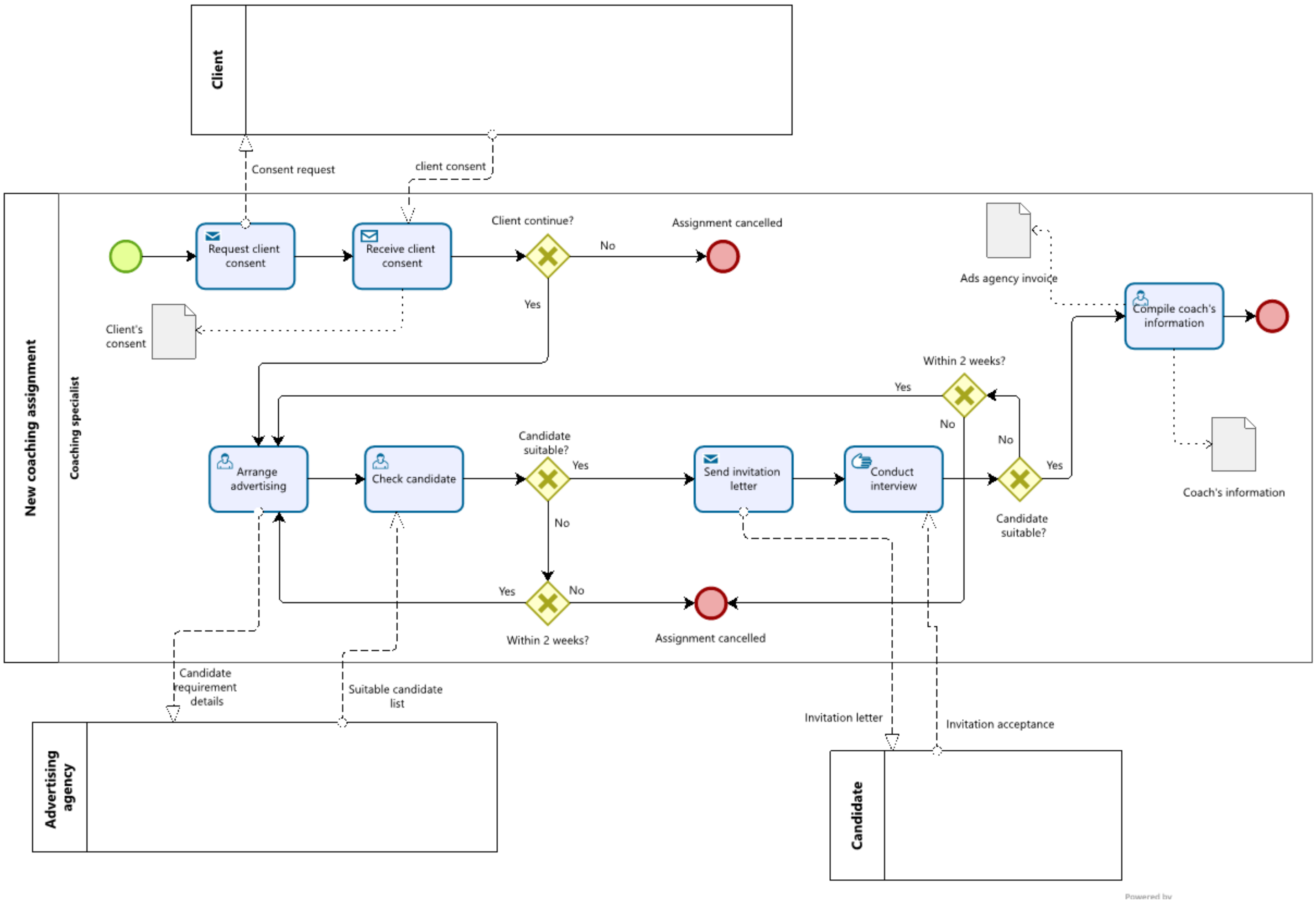

Figure 3. Recruit new coach subprocess

Type	Tasks, Gateways, and Events Names	Brief explanation
Events	Assignment cancelled	End event when no coach is found within 2 weeks, or the company fails to receive the client's consent

Tasks	Request client consent	Used to request the consent of clients in case the company hiring a new coach
	Receive client consent	Receive the consent from client
	Arrange advertising	The coach specialist arranges for an advertisement with an advertising agency to look for new coach
	Check candidate	The specialist checks all candidates after having a candidate list from the advertising agency
	Send invitation letter	In case a candidate is suitable for the job, the specialist sends an invitation letter to that candidate
	Conduct interview	Used to interview a new candidate
	Compile coach's information	The specialist compiles information into a file if a new candidate is hired, which will be sent to the Client relations officer.
Gateways	Decision gateway (Client continue?)	Used to check if the client consents to the new coach recruitment process. If 'No', cancel the assignment.
	Decision gateway (Candidate suitable?)	Used to check if the candidate is suitable for the job
	Decision gateway (Within 2 weeks?)	Used to check if the recruitment process has exceeded 2 weeks before a new coach is to be found. If 'Yes', cancel the assignment, if 'No', keep looking for a new candidate

4. Schedule assignment subprocess

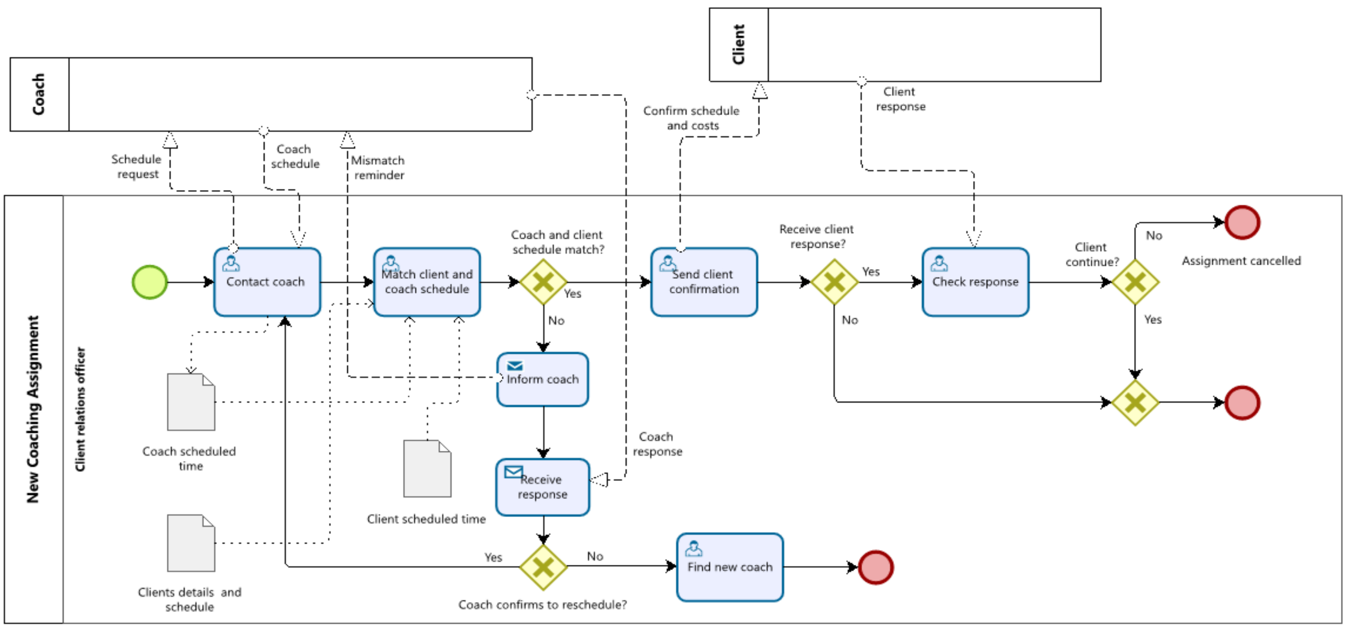

Figure 4. Schedule assignment subprocess

Type	Tasks, Gateways, and Events Names	Brief explanation

Events	Assignment cancelled	End event when clients may want to discontinue in the scheduling process
Tasks	Contact coach	Contact coach via phone to request their schedule and availability
	Match client and coach schedule	Once having the schedule from both coaches and clients, the client relations officer matches them together. **Assumption**: clients already submit their schedule in the coach request to the receptionist in the first place
	Inform coach	Used to inform the coach in case the schedule from both parties do not match, waiting for the coach response if he wants to reschedule
	Receive response	Used to receive and check response from the coach
	Find new coach	If the coach does not want to reschedule, the client relations officer proceeds to find a new coach
	Send client confirmation	Once the schedule from both parties matches, the officer sends the confirmation to the client, with details like confirmed schedule and costs included in the request
	Check response	Used to check if the client confirms the assignment
Decision Gateways	Coach and client schedule match?	Check if the schedule from both parties matches. If 'Yes', the officer confirms the schedule and costs to the client, if 'No', she informs the coach for a reschedule request

	Coach confirms to reschedule?	After informing the coach about the mismatched schedule, the officer checks if the coach wants to reschedule. If yes, she will contact the coach again to ask for a new schedule, if no, she proceeds to find a new coach
	Receive client response?	Check if the client responds after the officer informs the schedule and costs to the client. If no response is received, she assumes the client wants to continue, if yes, go to 'Check response' task
	Client continues?	In case the client responds to her confirmation of the assignment, the officer checks if the client wants to continue. If 'No', the assignment is cancelled, if 'Yes', go to next task

5. Verify assignment subprocess

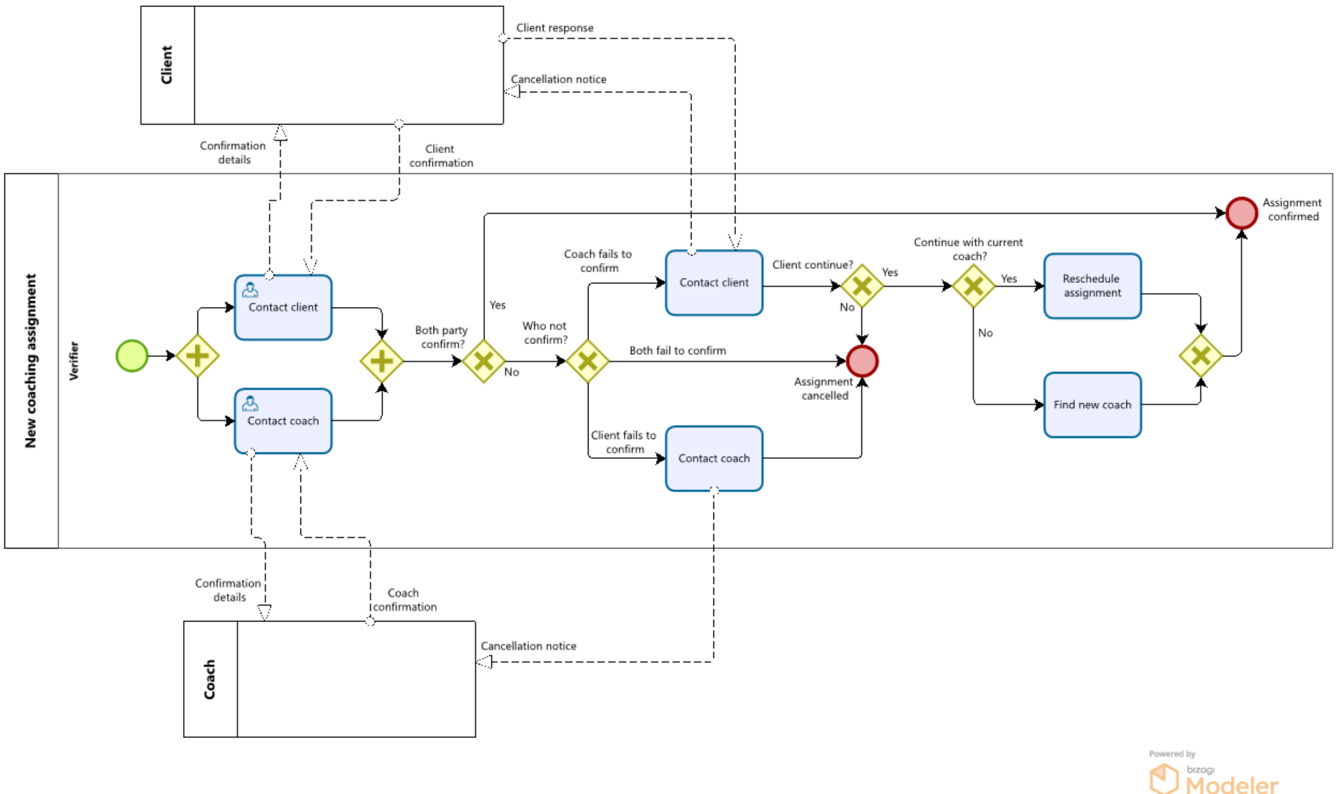

Figure 5. Verify assignment subprocess

Type	Tasks, Gateways, and Events Names	Brief explanation
Events	Assignment cancelled	End event when clients or both parties fail to confirm the assignment
	Assignment confirmed	End event when both parties confirm the assignment
Tasks	Contact client (1)	Contact clients via phone to request their confirmation of the assignment
	Contact coach (2)	Contact coaches via phone to request their confirmation of the assignment

	Contact client (2)	If coach fails to confirm the assignment, the verifier contacts the client again to ask for their next action: continue or not
	Contact coach (2)	If client fails to confirm the assignment, the verifier contacts the coach to inform about the cancellation
	Reschedule assignment	Used in case the coach fails to confirm, but the client wants to continue with the current coach. The verifier then arranges a reschedule session for both of them,
	Find new coach	Used in case the coach fails to confirm, but the client wants to continue but with a new coach. The verifier then passes the request of finding a new coach back to Ahmed
Decision Gateways	Both party confirm?	Check if both parties confirm the assignment. If 'Yes', go to 'Assignment confirmed end event, if 'No', determine who did not confirm
	Who not confirm?	Check who did not confirm the assignment, this can be the client, the coach, or both. If client fails to confirm, then contact the coach and cancel the assignment. If coach fails to confirm, contact client and ask for their action (continue or not)
	Client continue?	Used in case the coach fails to continue to check if the client wants to proceed with the assignment. If 'No', cancel the assignment.
	Continue with current coach?	In case the client wants to continue after the coach fails to confirm the assignment, he

		may decide if he wants to reschedule with the current coach or find a new one. If 'Yes', go to 'Reschedule assignment', if 'No', go to 'Find a new coach'.

6. Conduct survey subprocess

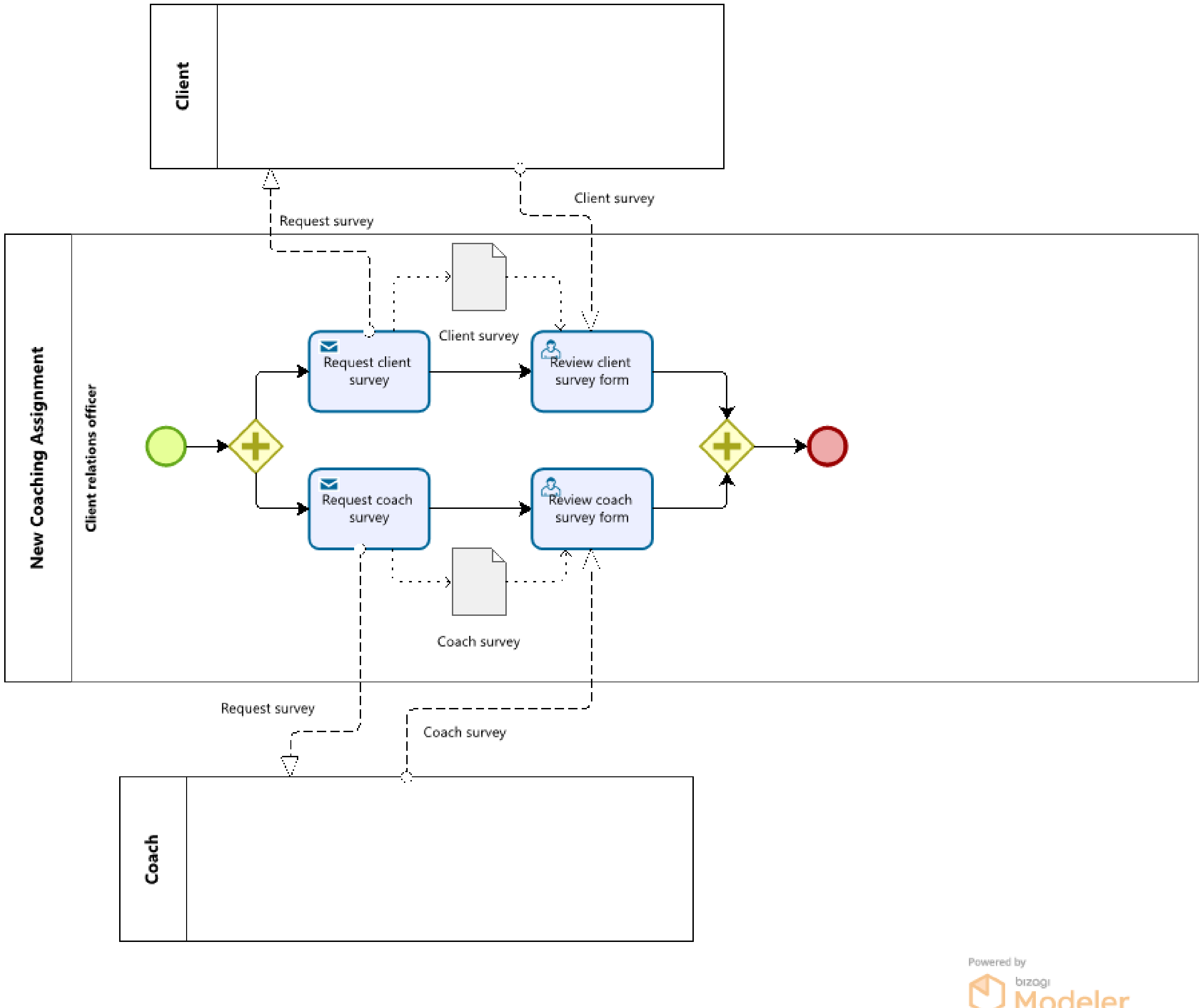

Figure 6. Conduct survey subprocess

Type	**Tasks, Gateways, and Events Names**	**Brief explanation**
Tasks	Request client survey	The client relations officer sends a request to the client asking for a satisfactory survey
	Request coach survey	The officer sends a request to the coach asking for a satisfactory survey
	Review client survey form	Used to review and check the survey form from the client
	Review coach survey form	Used to review and check the survey form from the coach

7. Proceed payment subprocess

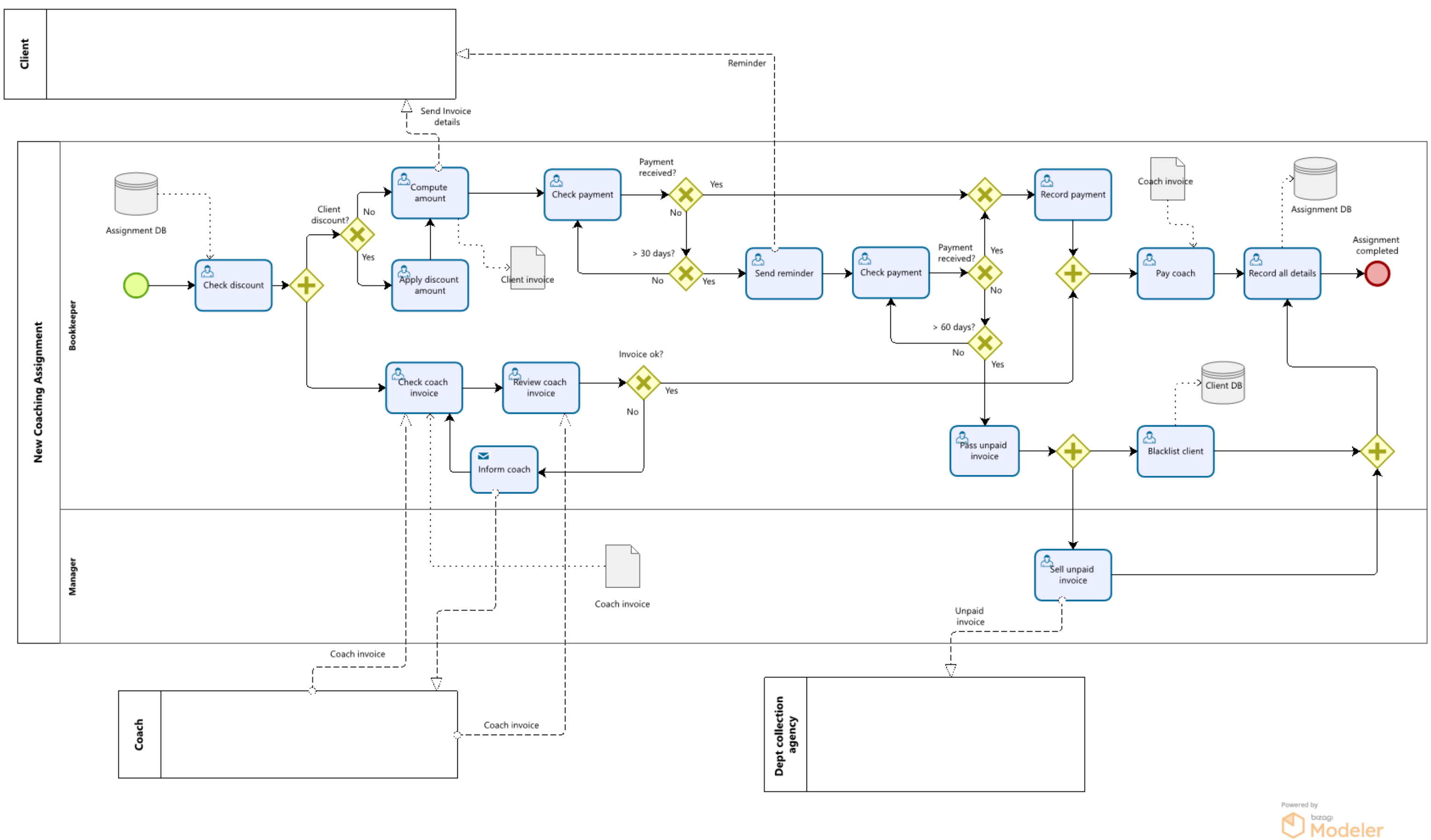

Figure 7. Proceed payment subprocess

Type	Tasks, Gateways, and Events Names	Brief explanation
Events	Assignment completed	End event when the assignment is completed, even when the client fails to make payment (**Assumption**: the client will

		be blacklisted, and the assignment is still completed)
Tasks	Check discount	The bookkeeper checks if the client has any discount applied (which might be Emily's friends)
	Apply discount amount	Used to apply the discount amount in case the client has discount applied
	Compute amount	Used to compute the amount that clients need to pay and send the invoice to the client
	Check coach invoice	Check the coach invoice once received from the coach
	Review coach invoice	Review the coach invoice to see if it is correct
	Inform coach	In case the invoice is incorrect, the bookkeeper informs the coach for a new invoice
	Check payment (1)	Used to check if the client has made any payment
	Send reminder	Used to send reminder to the clients if they fail to make a payment after 30 days
	Check payment (2)	Check payment after sending the reminder
	Record payment	Used to record the payment received from the coach
	Pay coach	Pay coach once the payment is received
	Record all details	Record the assignment in the assignment database one the payment finished
	Pass unpaid invoice	The bookkeeper passes the unpaid invoice to the manager in case clients fail to make any payment

	Blacklist client	The bookkeeper puts clients who fail to make any payment in the company blacklist
	Sell unpaid invoice	The manager sells the unpaid invoice to the dept collection agency
Decision gateways	Client discount?	Used to check if client has any discount applied.
	Payment received?	Used to check if any payment from the client has been received
	>30 days?	Used to check if the client has made any payment within 30 days. If 'Yes', check payment again, if 'No', send reminder
	>60 days?	Used to check if the client has made any payment within the next 60 days. If 'Yes', check payment again, if 'No', pass unpaid invoice to the manager
	Invoice ok?	Used to check if the invoice sent by the coach is correct. If no, the bookkeeper informs the coach and asks for a new invoice

Appendix B: Best Practices summary

Issue	Best Practices	Application Description/Solution explanation	Advantages	Disadvantages

Inefficient coach matching and scheduling	Resequencing	Moving the scheduling check task to gather coach availability before matching them to a client.	Helps prevent unnecessary loops, reduces rework, saves cost, and shortens Delays by aligning coach-client schedules earlier	Might necessitate more thorough planning and communication up front.
	Parallelism	Matching coaches with clients and verifying their availability at the same time before moving to scheduling process	Helps faster process completion, reduce waiting times and rework tasks,	Requires more resources and increases the risk of errors in handling multiple tasks
Invoicing and payment process	Triage	Splitting the invoicing process into different categories based on the complexity or value of the invoice (e.g. simple inquiries, technical issues, and billing problems)	Allocates resources more efficiently by ensuring that simpler, standard invoices are processed quickly and fast-tracked, while complex or high-risk cases receive the attention they require	May require effort to define which invoices are considered simple or complex and establish criteria for triage. If misclassified, complex cases could be handled by staff not equipped to manage them, leading to delays or errors

			Enhances the quality of the outcomes	
	Exception	Regular invoices are processed normally without disruption, while exceptions are flagged and handled independently	Ensures that any irregularities do not slow down the entire process	May complicate processes due to multiple paths, increase risk of misclassification, and require additional staff
Unclear role responsibilities and potential bottlenecks	Split responsibilities	Clearly delineating staff responsibilities and allowing each task would be assigned to one person to avoid overlap.	Ensures that employees know exactly what they are responsible for, eliminating confusion, bottlenecks, and delays. Reduces the risk of duplicated efforts or missed tasks due to assumptions that others are handling them	May limit the staff's ability to shift tasks easily due to its rigidly defined responsibilities
	Case manager	Appointing a case manager for each client who oversees all activities— from	Ensures there is no ambiguity regarding who is responsible for completing	A case manager, may not always have the expertise needed for every task, leading to

		client intake to coach assignment, scheduling, and follow-up.	each task	potential inefficiencies if they try to manage too many specialized roles.