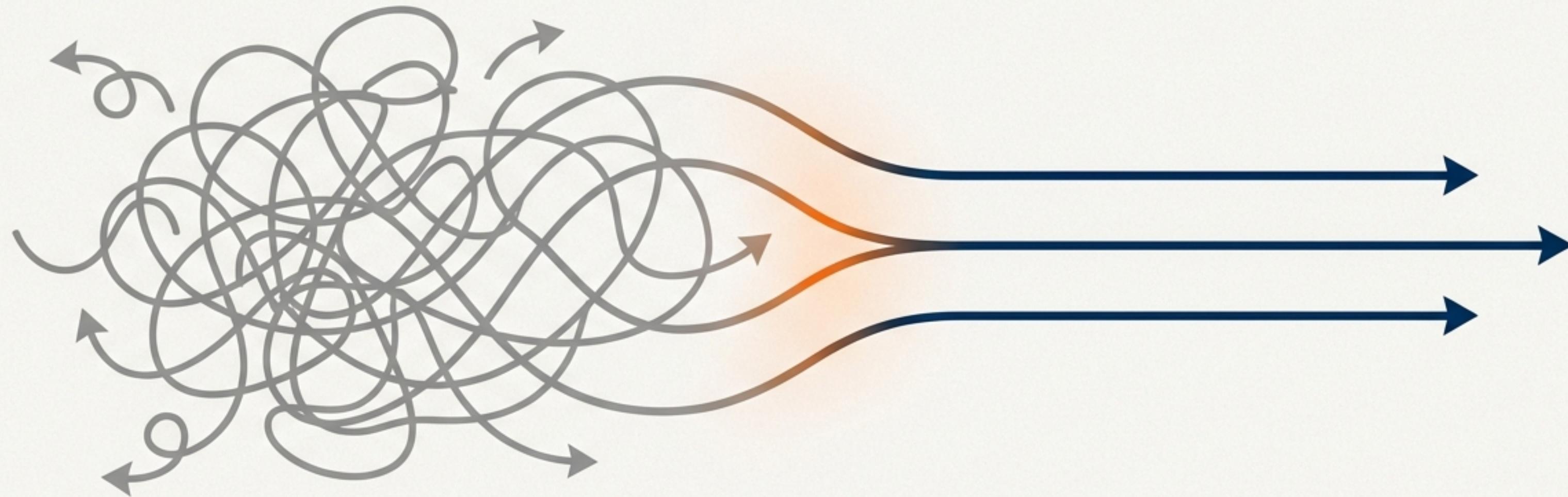


# Master Your Processes. Eliminate Waste.

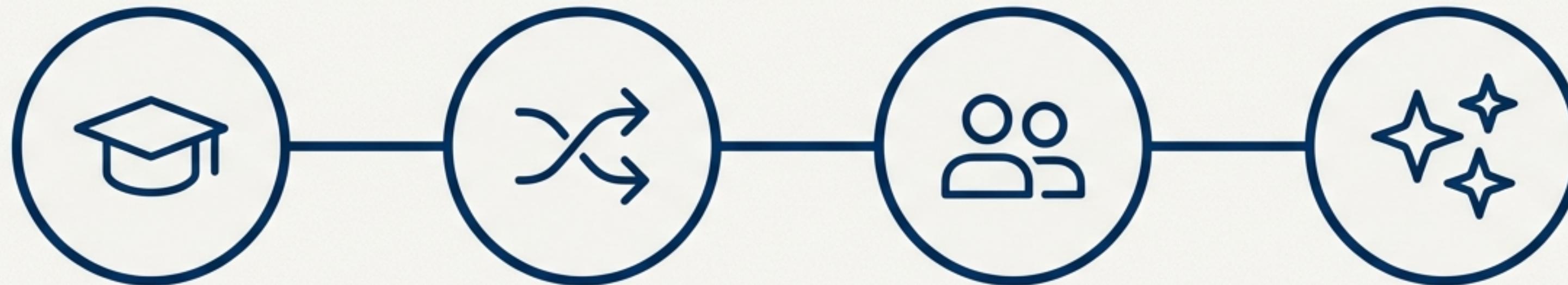
A guide to transforming your workflows with ProcessOpt.



ProcessOpt by Versatex

# Your Journey to Optimization

ProcessOpt guides you through a proven, structured methodology to turn inefficiency into excellence. Each step builds on the last, creating a clear path from understanding your current state to designing your ideal future.



## LEARN

Master the principles of waste identification.

## DEFINE

Visually map your current processes.

## ANALYZE

Collaboratively identify waste in real-time.

## OPTIMIZE

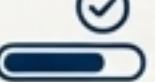
Use AI to design and implement a better future.



# Step 1: Learn the Language of Waste

Before you can eliminate waste, your team must learn to see it. The Training Module provides a shared vocabulary and framework, ensuring everyone can identify and classify inefficiencies consistently.

## Key Features

-  **Structured Modules:** Progress from foundational Lean concepts to deep dives on specific waste types.
-  **Mixed Media Content:** Engage with videos (🎥), articles (📖), slides (📄), and quizzes (❓) to test your knowledge.
-  **Progress Tracking:** Monitor your completion and unlock advanced modules as you master the concepts.

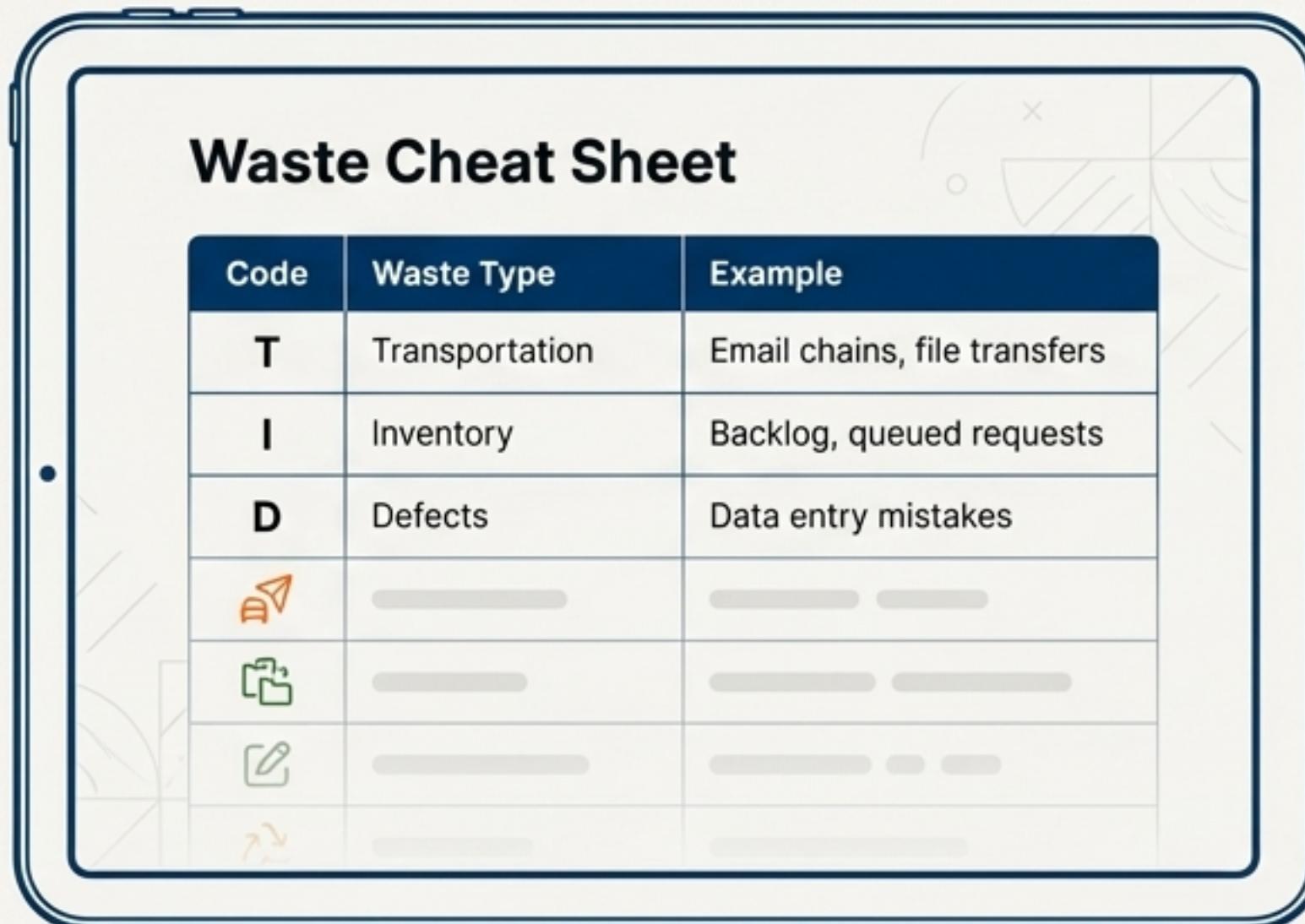
## The 8 Wastes (DOWNTIME / TIMWOODS)

A quick reference to the core Lean waste categories the platform uses:

- D** defects
- O** overproduction
- W** aiting
- N** non-utilized Talent (Skills)
- T** Transportation
- I** Inventory
- M** Motion
- E** Extra Processing (Overprocessing)

# Your Essential Field Guide: The Waste Cheat Sheet

Accessible **anytime from the sidebar**, the **Waste Cheat Sheet** is your quick reference during live waste walk sessions. Keep it open in a separate tab to accurately tag observations on the fly.



## What's Included:

- **Waste Codes & Names:** The full DOWNTIME/TIMWOODS list.
- **Clear Definitions:** Concise explanations of each waste type.
- **Practical Examples:** Real-world scenarios to aid identification (e.g., Transportation: 'Email chains, file transfers'; Defects: 'Data entry mistakes').
- **Identification Tips:** Key indicators to look for.



## Step 2: Define Your Current Reality

A workflow is more than a diagram; it's a visual hypothesis of how work gets done. By mapping your process, you create the foundation for targeted analysis and precise waste identification.

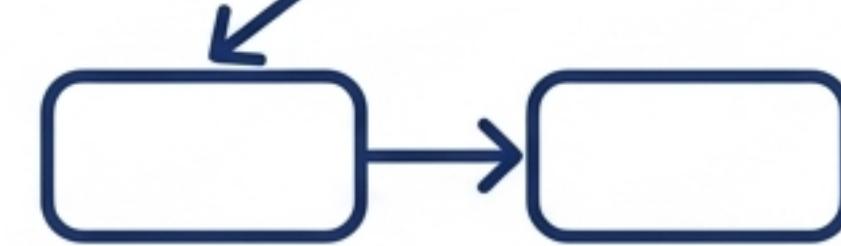
### Key Actions:

- 1. Create Swimlanes:** Define roles or departments (e.g., ‘Sales,’ ‘Finance’) to see who does what.
- 2. Add Process Steps:** Document each task, decision, and event in the workflow.
- 3. Connect the Flow:** Draw arrows to represent the sequence of work and handoffs.

Sales



Finance



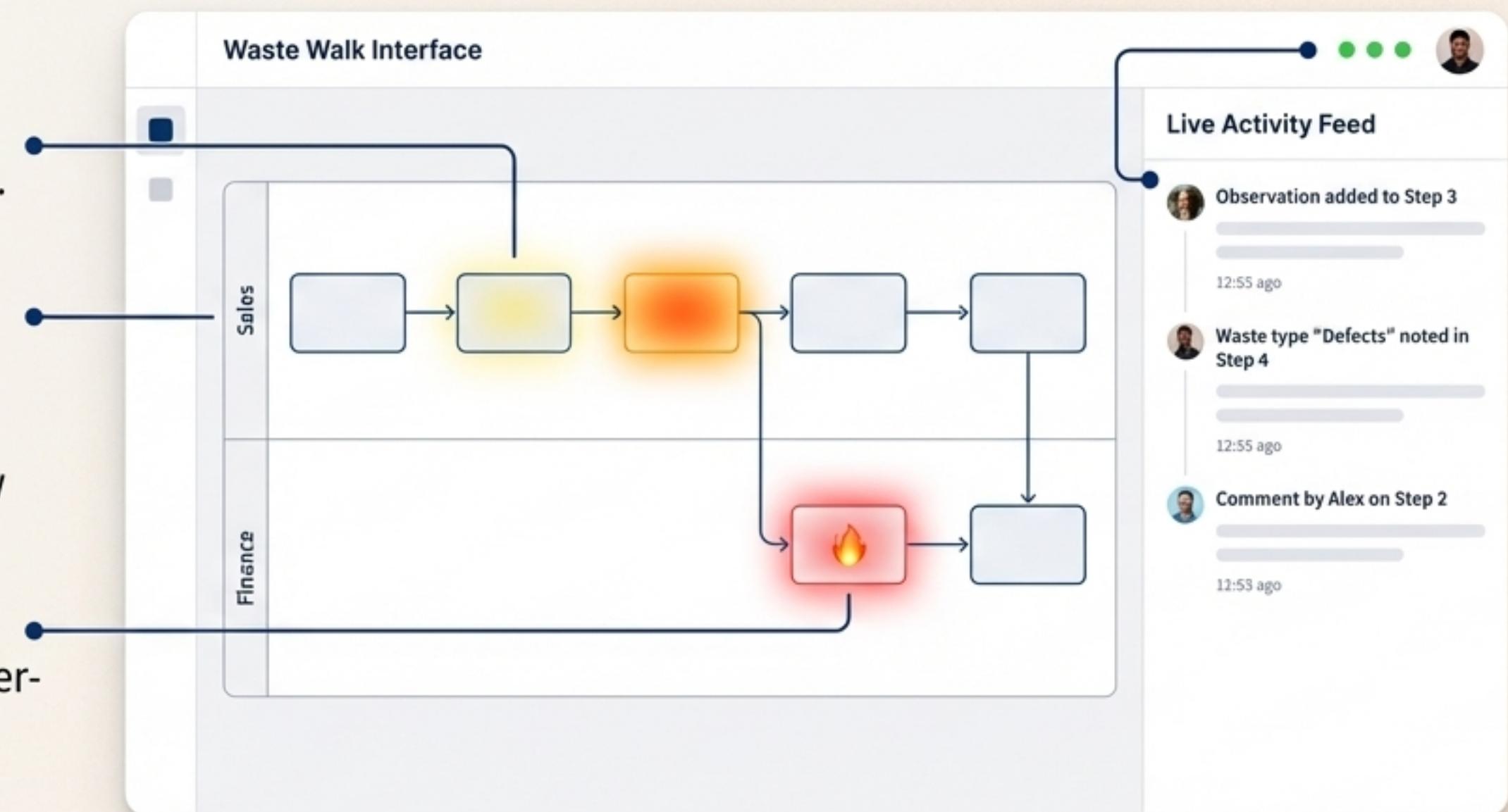
**Pro Tip:** Use the ‘Context Drawer’ (📋) to enrich your workflow with details on stakeholders, systems, and metrics. The more context you provide, the smarter the AI recommendations will be later.

# Step 3: Analyze and Uncover Hidden Waste

A Session, or "Waste Walk," transforms your static workflow map into a live, collaborative canvas. Your team collectively identifies and documents waste as it occurs within the process.

## The Waste Walk Interface:

- **Interactive Map:** The core of the session, showing your defined workflow.
- **Live Activity Feed:** See observations from teammates as they are added in real-time.
- **Participant Indicators:** Green dots show who is active in the session.
- **Heatmap Overlay:** Instantly visualize waste intensity. Steps with more or higher-priority observations glow red, guiding your team's focus to critical hotspots.



# From Observation to Insight: Capturing Waste

The value of a waste walk comes from the quality of its observations. Be specific, descriptive, and thorough.

## How to Add an Observation

1. Click a step on the process map.
2. Select '+ Add Observation'.
3. Fill in the key details:



**Notes:** Describe exactly what you saw.



**Waste Types:** Select one or more DOWNTIME categories.



**Priority/Scores:** Rate impact, frequency, and ease to fix (scale 1-10).



**Evidence:** Add optional photos or links.

## The Difference Between Good and Bad Observations



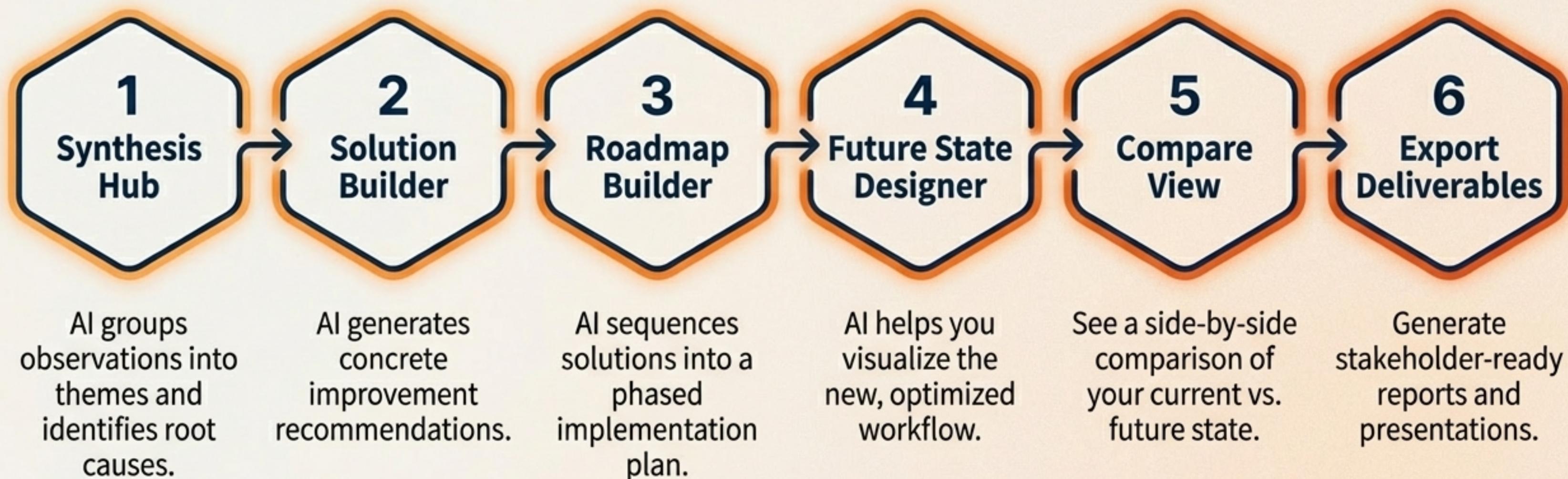
**Bad:** 'Slow approval'



**Good:** "Invoice approval takes 3 days because it requires 2 manager signatures for amounts over \$500, creating a bottleneck when managers are unavailable."

## ✨ Step 4: Optimize with the Future State Studio

This is where your team's observations are transformed into an actionable, AI-generated plan for a better process. The Future State Studio is a six-stage pipeline that guides you from raw data to a fully designed and documented future state.



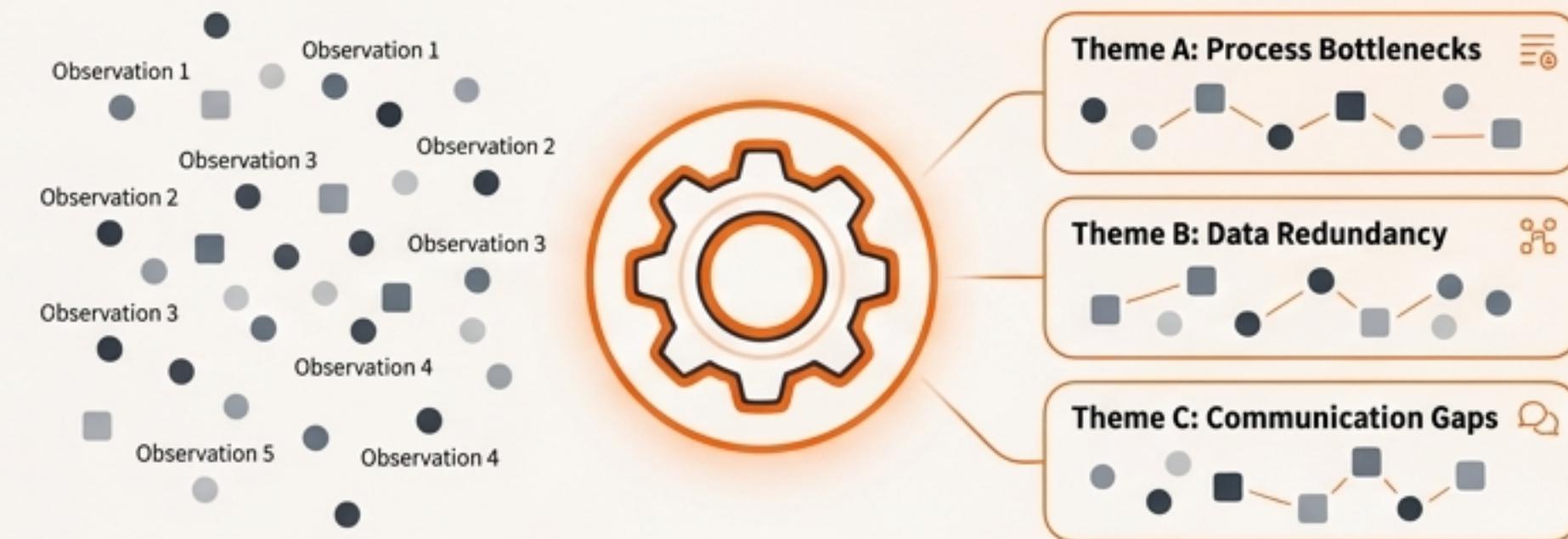
# Stage 1 & 2: From Raw Data to Actionable Solutions

The AI first acts as an analyst, then as a strategist. It finds the patterns in your data and proposes clear ways to fix them.

## Stage 1: Synthesis Hub

The AI agent analyzes all observations and groups them into meaningful **Themes**, each with a summary and a hypothesized root cause.

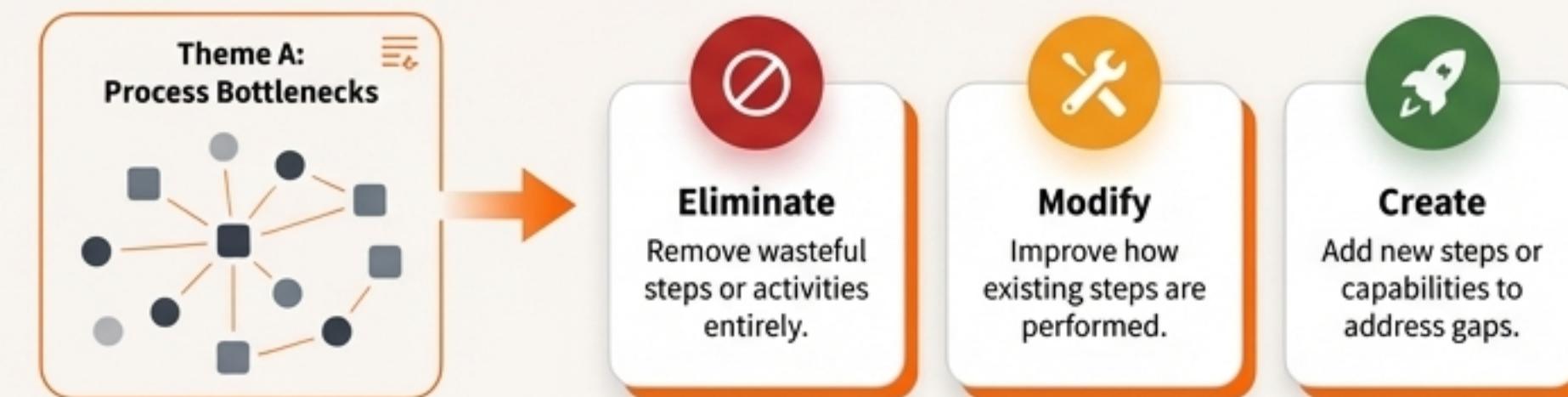
Your role is to review, edit, and **confirm** these themes to ensure they reflect business reality.



## Stage 2: Solution Builder

Based on the confirmed themes, the AI generates **Solution Cards**. Each card is a specific recommendation, categorized by action type:

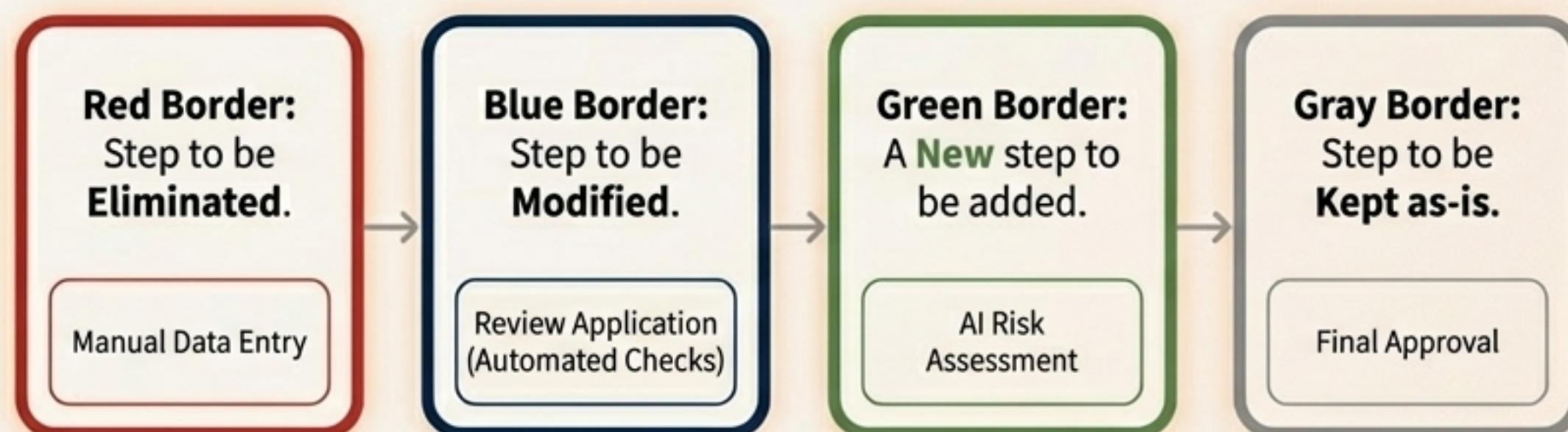
- **Eliminate:** Remove wasteful steps or activities entirely.
- **Modify:** Improve how existing steps are performed.
- **Create:** Add new steps or capabilities to address gaps.



# Stage 4: Designing the Optimized Process

The Future State Designer is an interactive canvas where your new workflow comes to life. It combines a clear visual system with powerful AI assistance to help you design every detail of the future state.

## Visual Node System



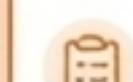
## AI Co-pilot: Step Design Assist

### Step Design Assist

Click any step to open the design panel. Here, you can:



**Generate Options:** Ask the AI to produce 2-3 design alternatives for a step.



**Review Details:** Each option includes inputs/outputs, actions, SLAs, risks, and a confidence score.



**Provide Context:** Chat with the AI and answer its clarifying questions for more tailored results.

**Generate Options**



**AI Co-pilot**  
Which part of the 'Review Application' step needs modification? Does it require new data inputs or is it about the approval criteria?

Type your response...

# Stage 3, 5 & 6: Plan, Validate, and Communicate

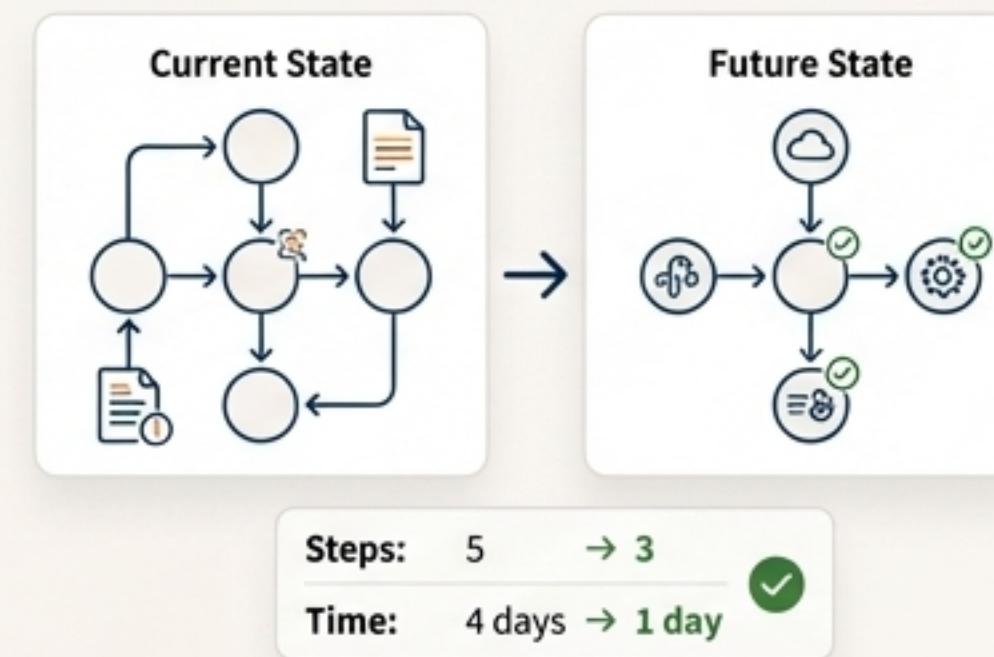
A great design is only effective if it's implemented correctly. The final stages provide the tools to create a strategic roadmap and share your vision with stakeholders.

## Roadmap Builder



Accepted solutions are sequenced into **Implementation Waves** based on dependencies, effort, and impact.

## Compare View



Validate your work with a side-by-side view...

See key metric improvements like reduced step count and estimated cycle time savings.

## Export Deliverables



Generate professional documentation with a single click, including:

- **PowerPoint (PPTX)**: A full stakeholder presentation.
- **Summary Report (PDF)**: A detailed executive overview.
- **Process Maps (PNG/SVG)**: Visuals for documentation.

# Measure and Improve: The Analytics Dashboard

Optimization is a continuous cycle. The Analytics module transforms your session data into high-level insights, helping you track progress and identify the next area of focus.

## Key Dashboards:



**Waste Distribution:** See which of the 8 wastes are most prevalent in your processes.



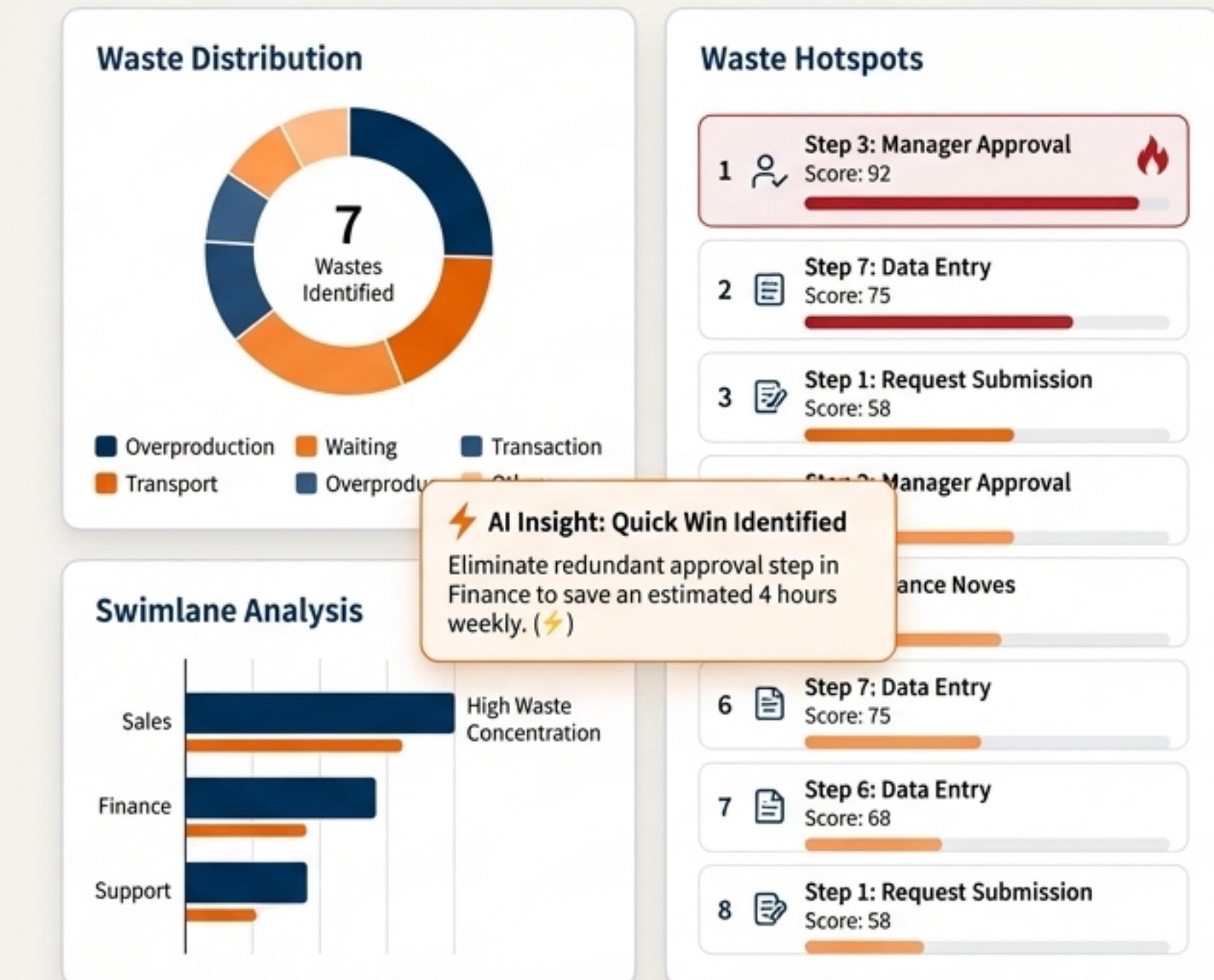
**Waste Hotspots:** A prioritized list of process steps based on a score of **Frequency × Impact × Ease**. Focus your efforts where they matter most.



**Swimlane Analysis:** Compare waste levels across different departments or roles to find systemic issues.



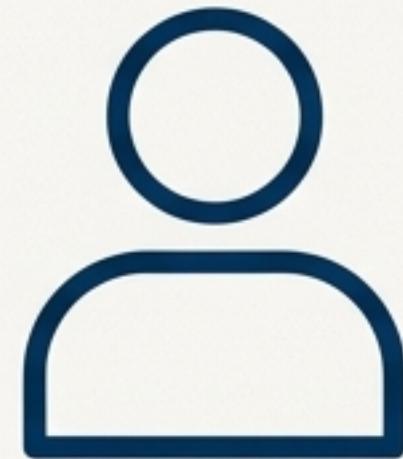
**AI Insights:** The system proactively surfaces trends, patterns, and potential ‘Quick Wins’ (⚡) based on your data.



# Understanding Your Role on the Team

ProcessOpt defines three distinct roles to ensure clarity and proper governance. Your role determines what you can see and do within the platform.

## Participant



The core team member. Can complete training, join sessions, and add observations to contribute to the analysis.

## Facilitator



The session leader. Can do everything a Participant can, plus create and manage workflows, start and end sessions, and view full analytics.

## Admin



The system owner. Can do everything a Facilitator can, plus manage users, configure organization-wide settings like custom waste types, and manage training content.

Need more access? Contact your organization's administrator.

# Best Practices for High-Impact Results

The quality of your output is directly related to the quality of your input. Follow these guidelines to maximize the effectiveness of your optimization efforts.

## For High-Quality Observations

-  **Be Specific:** Quantify where possible. “Takes 3 days” is better than “is slow.”
-  **Explain the “Why”:** Describe the impact of the waste on customers, cost, or employees.
-  **Tag Thoroughly:** An observation can have multiple waste types.

## To Get the Best from AI

-  **Enrich Workflow Context:** The more the AI knows about your process’s purpose, stakeholders, and systems, the more relevant its suggestions will be.
-  **Write Detailed Notes:** Longer, more descriptive observations give the AI more data to analyze for themes and root causes.
-  **Iterate and Refine:** Treat the AI as a partner. Review its suggestions, edit them with your business knowledge, and regenerate options when needed.

# Your ProcessOpt Toolkit

You are now ready to begin your journey. Use these resources to support you along the way.

## Key Resources



**Waste Cheat Sheet:** Your constant companion for identifying waste. Always accessible in the sidebar.



**Help Icon:** Click the question mark icon in the app's header for context-sensitive help on any screen.



**Full Documentation:** For detailed information on any feature, visit '/docs'.

## Keyboard Shortcuts

**'?'** → Open Help

**Esc** → Close modals and panels

**Enter** → Submit forms

**ProcessOpt: The clear path to a better process.**