

## **AUTOMATION STRATEGY FOR THE CONSIDERATION OF INNOVATIONCMU CO.**

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I am writing this proposal assuming that my team and I at Workato have been invited to Anchorage, Alaska to assess the processes at InnovationCMU Co. This proposal is addressed directly to Ms. Alix Goodman.

I am writing to propose a solution to the challenge of attaining at least 25% efficiency in your Order to Cash (O2C) and Hire to Retire (H2R) processes. My proposed approach involves a two-week engagement with your team, during which we will assess the current state of your processes, identify areas for improvement, and provide a roadmap for achieving the desired efficiencies.

### **THE APPROACH**

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- **Week #1**

The first week of the engagement will involve conducting an in-depth analysis of your current O2C and H2R processes to identify pain points and areas for improvement.

This will involve the following activities:

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1. Interviews with key stakeholders: We will interview members of your O2C and H2R teams to gain a better understanding of their roles and responsibilities, the challenges they face, and the systems and processes they use.
2. Process mapping:<sup>1</sup> We will create a process map of your current O2C and H2R processes to identify inefficiencies and areas for improvement.
3. Metrics analysis:<sup>2</sup> We will analyze the metrics currently being used to measure the performance of your O2C and H2R processes and identify opportunities for improvement. We may also see if there is any need for a newer metric to be introduced.
4. Technology review: We will review the technology currently being used in your O2C and H2R processes and identify any gaps or areas for improvement.

## ● Week #2

The second week of the engagement will involve developing a roadmap for achieving the desired efficiencies in your O2C and H2R processes. This will involve the following activities:

1. Gap analysis:<sup>3</sup> We will compare your current state to best practices in O2C and H2R processes and identify the gaps that need to be addressed to achieve the desired efficiencies.

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<sup>1</sup> "Process Mapping - Six Sigma Study Guide." Accessed February 19, 2023. <https://sixsigmastudyguide.com/process-mapping/>.

<sup>2</sup> "How to analyze metrics in 5 steps - Product Lessons." Accessed February 19, 2023. <https://www.productlessons.xyz/article/how-to-analyze-metrics>.

<sup>3</sup> "Conducting A Gap Analysis: A Four-Step Template." Accessed February 19, 2023. <https://www.clearpointstrategy.com/gap-analysis-template/>.

2. **Recommendations:** Based on the results of the analysis, we will provide a set of recommendations for improving your O2C and H2R processes, including changes to process flows, technology solutions, and metrics.
3. **Roadmap:** We will create a detailed roadmap for implementing the recommendations, including a timeline, milestones, and resources required.

## ASSUMPTIONS

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To ensure a smooth engagement process and effective delivery of our recommendations, we are making the following assumptions:

1. InnovationCMU Co. has already conducted a thorough analysis of their O2C and H2R processes, and our role is to build on this analysis and provide additional insights.
2. We assume that the data provided by InnovationCMU Co. regarding the current state of their O2C and H2R processes is accurate.
3. We assume that the teams responsible for O2C and H2R processes are fully committed to achieving the goal of 25% efficiency and are willing to implement our recommendations.
4. We assume that we will have access to all necessary resources during the engagement and that there will be no impediments to our work, including any technological or infrastructure-related issues.

## RESEARCH

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To ensure that our recommendations are grounded in best practices, we will conduct research on the latest trends and best practices in O2C and H2R processes. This will include a review of industry publications and reports, as well as discussions with our internal subject matter experts.

But based on the rudimentary data provided, our team proposes the following changes to improve InnovationCMU Co.'s O2C and H2R processes:

- **Order to Cash Process (O2C):**

1. Automate order processing to increase efficiency:<sup>4</sup> The current process is very manual, and each person can only process 15 orders in a day. By automating order processing, InnovationCMU Co. can increase the number of orders processed per day and reduce the processing time. We propose to use Workato's low code tool to realize this automation.
2. Repurpose the team: Once the entire order-to-cash (O2C) process is automated, the 30 processors and 5 leads currently employed in this department can be repurposed. The 30 processors can be completely removed from this team and utilized elsewhere, with additional training provided to upskill them as

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<sup>4</sup> "5 Actionable Ways to Improve Your Order to Cash Cycle - Apruve Blog." Accessed February 19, 2023.  
<https://blog.apruve.com/5-actionable-ways-to-improve-your-order-to-cash-cycle>.

needed. The remaining 5 leads will be solely responsible for monitoring and reporting on the O2C process.

3. Improve data accuracy: We recommend implementing a system that ensures accurate data entry, such as a barcode scanning system, to reduce errors and improve overall efficiency.
4. Integrate SAP BusinessOne and Salesforce: By integrating these two systems, we can reduce data entry errors and improve the overall efficiency of the order processing system.

### ● Hire to Retire Process (H2R):

1. Standardize the onboarding and offboarding processes: We recommend developing a standard onboarding and offboarding process that ensures consistency and reduces the time required for each process.
2. Automate the onboarding and offboarding processes:<sup>5</sup> We recommend using Workato's low code tool that automates the onboarding and offboarding processes, reducing the time required for each process and improving overall efficiency.
3. Review the contingent employee offboarding process: We recommend reviewing the current contingent employee offboarding process to identify areas

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<sup>5</sup> "How to automate employee onboarding and offboarding | Zapier." Accessed February 19, 2023.  
<https://zapier.com/blog/automate-employee-onboarding-offboarding/>.

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for improvement, such as reducing the time required for each process (it currently takes 90 minutes to offboard a single contingent employee), reducing costs, and increasing efficiency.

4. Analyze the need to layoff contingent employees: Every year, InnovationCMU Co. lays off 45 out of the 60 contingent employees it hires. However, the amount of time and money invested in onboarding and offboarding these employees may not have yielded a return on investment during their brief tenure at the company. Therefore, we suggest that the company consider retaining contingent employees for a longer period of time, taking into account the onboarding and offboarding costs per employee and the revenue they generate during their tenure. Layoffs should only occur when the ratio of these costs to revenue generated exceeds 1, with exceptions, of course.

## RESOURCES

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During the engagement, we will need to work closely with the teams responsible for O2C and H2R processes. We will require access to their process documentation, workflows, and related tools such as SAP BusinessOne, Salesforce (SteelBrick), and Workday. We would also appreciate access to the current KPI data and any other relevant reports.

## NEXT STEPS

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If you decide to proceed with this engagement, we will provide a detailed project plan and timeline, outlining the activities to be completed and the resources required. At the end of the two-week engagement, we will present our findings and recommendations to your team, along with a detailed roadmap for achieving the desired efficiencies in your O2C and H2R processes.

The next steps after the engagement will be to execute the recommended changes to the O2C and H2R processes. This will involve working closely with the InnovationCMU team to ensure that the new processes and systems are implemented efficiently and effectively.

We will provide ongoing support and training to ensure that the employees are able to use the new processes and systems effectively. We will also monitor the KPIs to ensure that the changes have the desired impact on efficiency and cost reduction.

In conclusion, we believe that the automation and streamlining of the O2C and H2R processes are critical for achieving the desired efficiencies and cost savings at InnovationCMU. We are confident that our team of experts can work closely with the InnovationCMU team to deliver the desired outcomes within the given timeframe.