

# Agenda

- Objectives
- Inventory & Roadmap Plan
- Inventory and Results
  - As-Is Process Inventory
  - As-Is Process Analysis
  - To-Be Process Inventory (Slide 19 Updated with additional process/services)
  - To-Be Process Results (Slides 21, 22, 24 Updated with additional process/services)
- BPM Estimation Methods
- ROM Estimation Results (Slides 41& 42 New with additional process/services)
- Prioritization Results (Slide 44 Updated with additional process/services)
- Roadmap (Slide 45 Updated with additional process/services)
- Appendices:
  - Site Logistics
  - Project Team
  - Business SMEs
  - Existing Materials
  - Process Inventory Focus
  - Previous Process Inventory Statuses
  - Weekly Statuses (Slide 66 New Week 7 Status)
  - Questions

## Project Objectives

- Goals:
  - The **C**ustomer **O**rganization **P**ortal **D**ata **R**edesign (**COPDR**) Program's **Phase 3** intention is to leverage new centralized customer data store (IBM MDM system) and implement new business process management solution to enhance User Interface and automate business workflow.
- Scope:
  - Implement new business process management solution using IBM Blueworks Live for Agency Management to enhance User Interface and to automate workflow accordingly.
  - Add flexibility to assign underwriter at more granular levels.( example- TOB, Agent number)
  - Create contact types (branch manager, office administrator, key contact, etc.) and be able to assign to agency contacts. Capture more contact profile data such as revenue and agents other marketing information.
  - Ensure data necessary to make updates is displayed on the administrative screens.
  - Provide training/material to internal and external administrators and users ...
- Deliverables:
  - Weekly Status Reports
  - “To-Be” Business Process Models
  - Engagement Summary Presentation

## Inventory & Road Mapping: Objectives

- **Inventory** of top-level processes, using existing documentation, related to:
  - Process Models, Pain Points, Participants and Metrics
  - Critical Success Factors and Objectives
- **Recommended Roadmap** delivered as an Engagement Summary based on:
  - Weighted Attributes, like Revenue, Operational Cost, Complexity...
  - Rough Order of Magnitude (ROM) Estimates and Guidelines
  - To-Be Business Process Models
- **Enablement** of your team for replicating inventory and road mapping
  - Discovery in BlueworksLive
  - ROM Estimation guidelines

## Process Inventory Goals

- Strategic Goals and Objectives
- Critical Success Factors
- Challenges

## Strategic Alignment – Business Objectives

The participants agreed on Business Objectives for Phase 3 (BPM ) in COPDR program as follows.

ID	SG Business Objectives	Phase 3 (BPM ) Objectives
BO1	Improve customer experience	<ul style="list-style-type: none"> <li>▪ Simplify agency access to support merger and acquisition trends in the marketplace.</li> <li>▪ Ability to maintain external and internal agency hierarchy.</li> </ul>
BO2	Support growth strategy	<ul style="list-style-type: none"> <li>▪ Accurately collect, store and display agency data thus maximizing our ability to better align with our strategic goals (i.e.: analyze premium potentials, appetite, and share of wallet, competitor utilization and potential expansion into other areas).</li> <li>▪ Producer Level Management.</li> </ul>
BO3	Reduce process complexity	<ul style="list-style-type: none"> <li>▪ Deliver a flexible and extensible solution to support changing business.</li> </ul>
BO4	Mitigate risk and improve compliance with NW security regulations	<ul style="list-style-type: none"> <li>▪ Automate the “90-Day Inactivate” process which is currently manual and could lead to contacts having access beyond the 90 day window .</li> </ul>

NOTE: Content from BPM\_Alignment\_Draft\_v1.3.ppt from Nationwide

## Objectives Aligned to Critical Success Factors

ID	Project Objectives	ID	Critical Success Factors
PO1	<ul style="list-style-type: none"> <li>▪ <b>Online ADM 916 : Consolidate multiple tools into a single tool to administer Agency/Agent information.</b></li> <li>▪ <b>Reduce process complexity.</b></li> </ul>	CSF1	<p>Decreased costs to administer portal information and see a 30% decrease in time to administer</p> <p>Improved ability for Underwriter Management to manage and administer.</p>
PO2	<b>Underwriter Assignments</b>	CSF2	Provide one source to maintain underwriter-to-application relationships, and ensure that Underwriter reassignments can happen without creating gaps in workflow
PO3	<b>Mitigate risk and improve compliance with NW security regulations.</b>	CSF3	Improved 90-day security compliance
PO4	<b>Single log in ID</b>	CSF4	All customers have one, and only one login ID to the system and Improved customer experience for ~70% of the production base.
PO5	<b>Reporting</b>	CSF5	This process will simplify Users to generate reports of Customer Data in MDM( Master Data Management system)

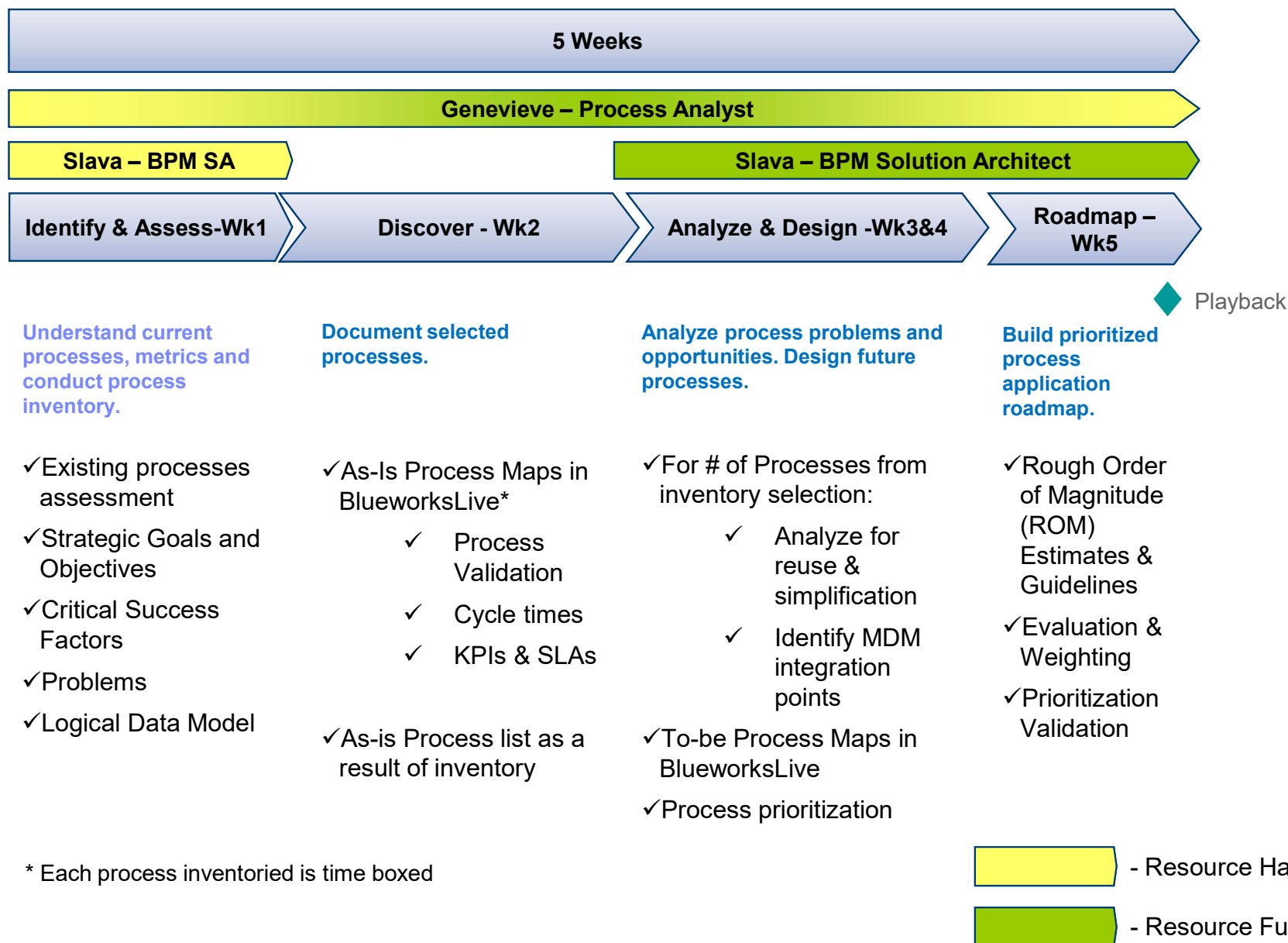
NOTE: Content from BPM\_Alignment\_Draft\_v1.3.ppt from Nationwide

## Current Challenges

ID	Current Challenges	Description
CC1	<b>Business Workflow</b>	The business activities performed in the current state in some business scenarios use multiple applications to enter the same data; thus this increase's possibility of data duplication and human errors resulting in corrupted data.
CC2	<b>Underwriter Agent Assignments</b>	<ul style="list-style-type: none"> <li>Multiple systems with the same data cause multiple points of failure.</li> <li>Inability to align and route underwriters with internal business structure.</li> </ul>
CC3	<b>Automate 90 day account deactivation</b>	This is a tedious manual process to identify accounts with inactivity, its time consuming and prone to errors.
CC4	<b>Multiple Log-in Id's</b>	<p>Agency contacts in the existing hierarchy is constructed in a manner that ,it requires an agency contact to have a separate log-in id's for each location where they are authorized to submit business .</p> <p>To provide the ability to manage the data hierarchy to support elimination of multiple login id's.</p>
CC5	<b>Reporting</b>	Business has limited access to customer data for Reporting.

NOTE: Content from BPM\_Alignment\_Draft\_v1.3.ppt from Nationwide

# Inventory & Roadmap Plan





## Process Inventory – Analysis & Results

- Process Inventory – As-Is Processes
- Analysis - As-Is Processes
- Process Inventory – To-Be Processes
- Results - To-Be Processes Improvements

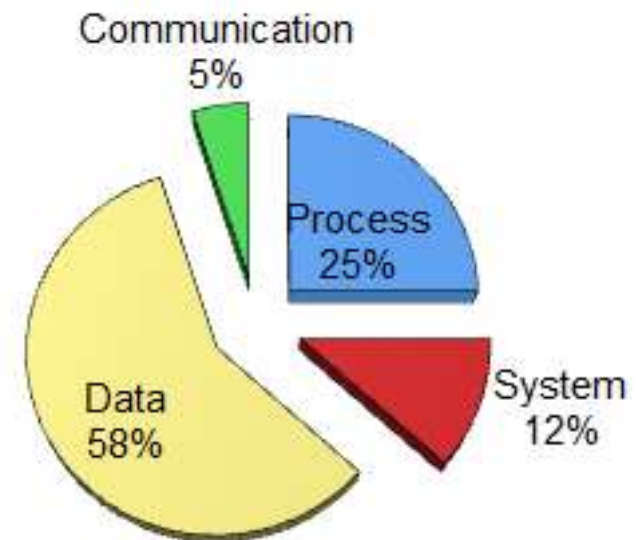
## Process Inventory – Validated As-Is Processes – Mar. 4

Process	Problems	Steps	Participants	Inputs / Outputs	Cycle Times (total work/wait time all activ.)	Systems	KPIs & SLAs
Add Agency	16	22	5	11/10	1 Day 5 Hours / 21 Days	12	1/1
Add Agency Contact	15	11	7		1 Hour / 1 Day	3	
Terminate Agency (was Agency Cancellation)	5	8	4	5/4	2 Days / 26 Days + 18 Mos wait period to delete agency	4	
Setup Underwriter Assignments	14	4	4	4/2	35 Min / 4 Days	4	
Deactivate 90 Day Inactive Account (Not currently used, was 90 Day Inactive Account Deactivation )	6	8	5	2/5	Not captured, process not used	1	
Setup Access to External Reports	5	10	4	1/1	1 Hour / 1 Day 20 Min	1	
Update Agency Authority	10	9	3	10/5	6 Hours 45 Min / 21 Days 5 Min	5	
Update Agency Information (combine: Update Agency Individual Information Update Agency Contact Information Update Individual Portal Account)	10	9	6	3/1	1 Hour 50 Min / 1 Day	6	
Suspend Agency Authority (NEW)	5	8	3		1 Day 2 Hours / No wait captured	4	
Update Underwriter Assignments	14	6	4	1/1	55 Min / 2 Days	5	

## Process Problems

### 58 Process problems were categorized (examples):

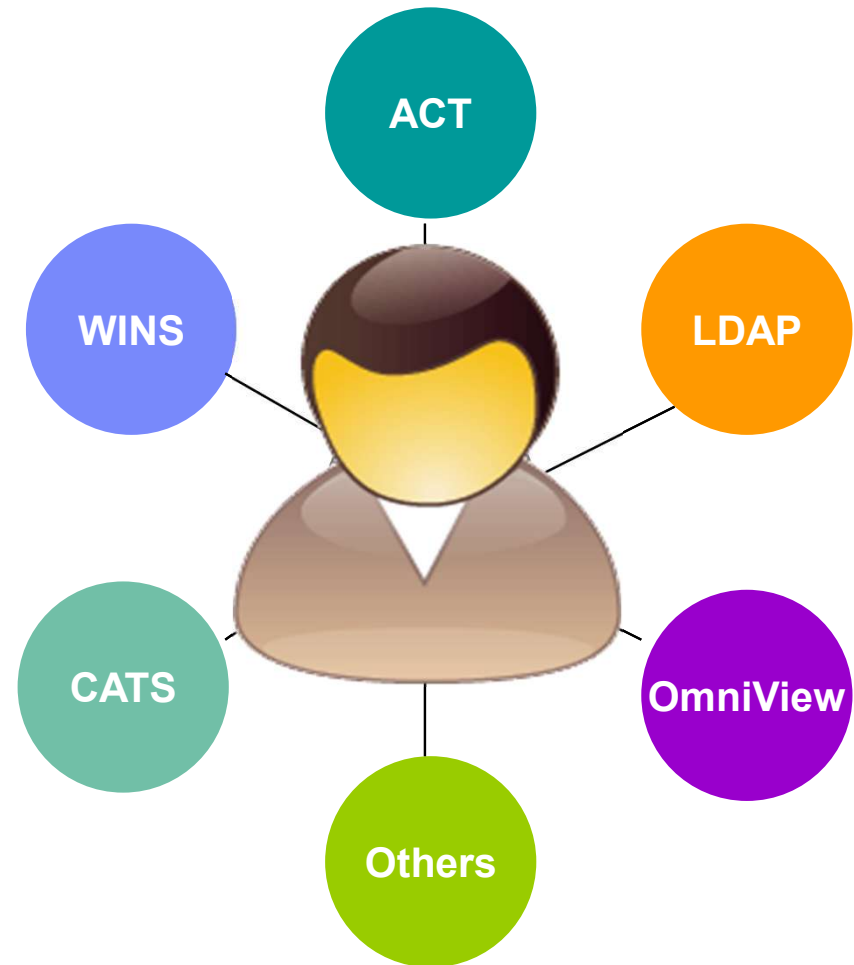
- **Methodology (Process) related**
  - If setup on a Friday, 48 hrs expires account activation link over weekend before next weekday
  - Lack of understanding of the process
- **Behavior (including Communication) related**
  - Lack of communication (IT and Business)
  - Doesn't always send a notification to UW Admin
- **System (including Data) related**
  - Restrictive data relationships
  - Lack of visibility of data across multiple systems



## Problem

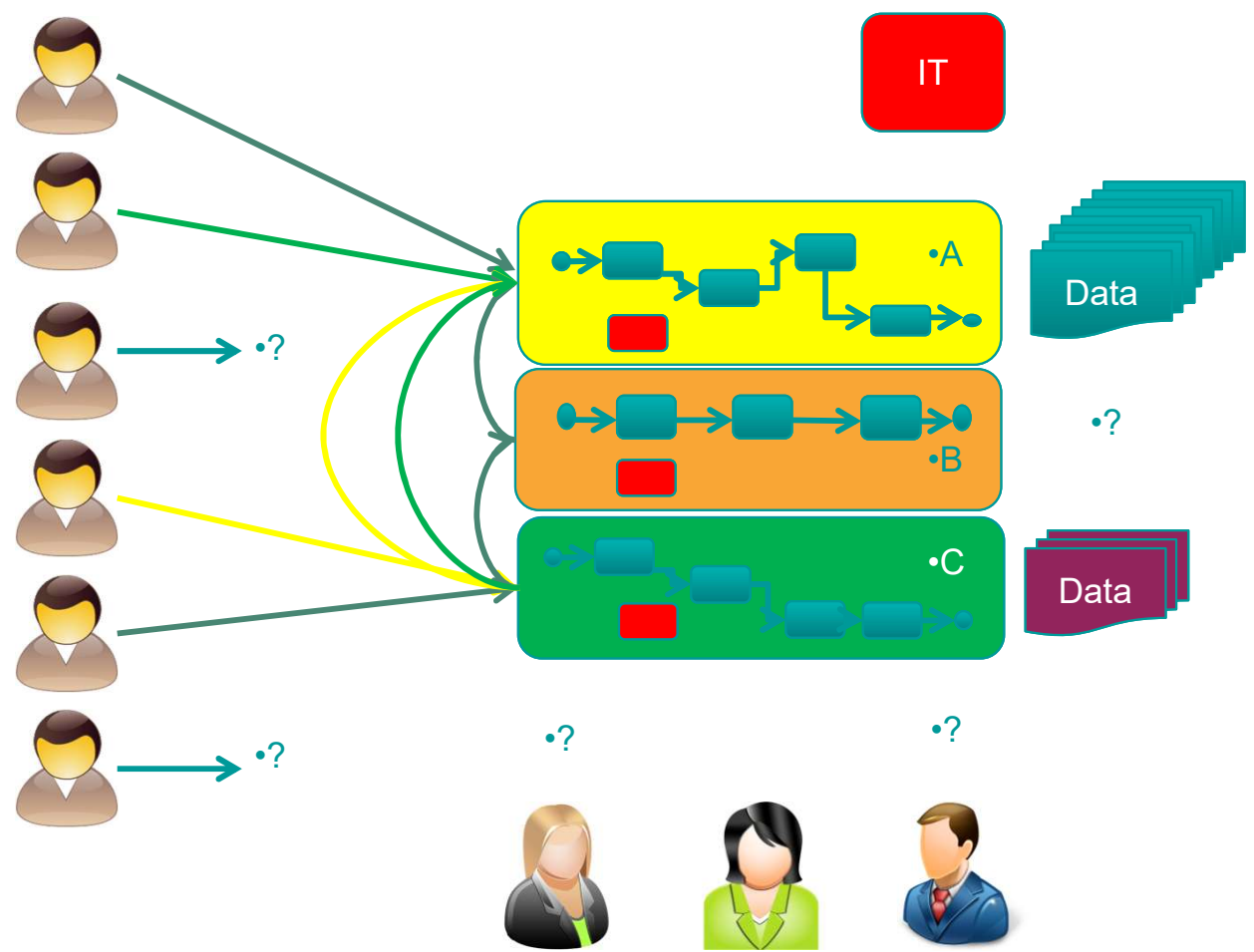
### System/Application/Data Fragmentation

- No central repository for process & business data
- No visibility into the end to end process
- No one body of governance for processes and data



# Problems

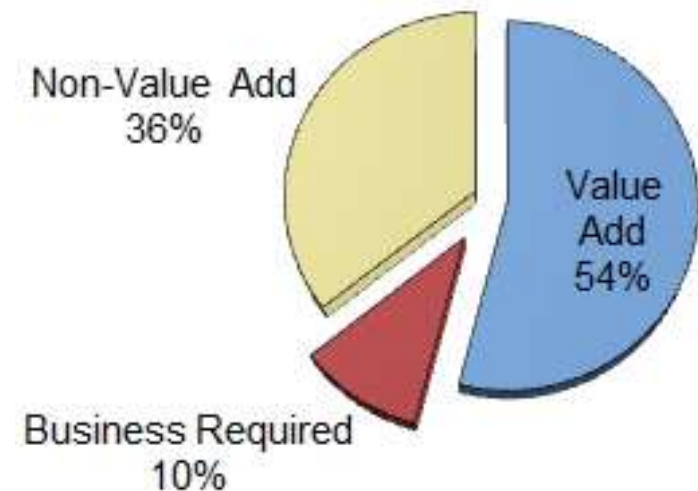
- Summary
- Current State (As-Is)
- Requests are submitted inconsistently (incomplete/invalid data)
- Requests are routed to other processes (many hand-offs to complete work)
- People in the departments manage their own systems (different systems for each area)
- No single repository of process data (multiple systems)
- No real time reporting (lack of visibility into data and process status)



## Process Value Add

### 95 Process activities were categorized (examples):

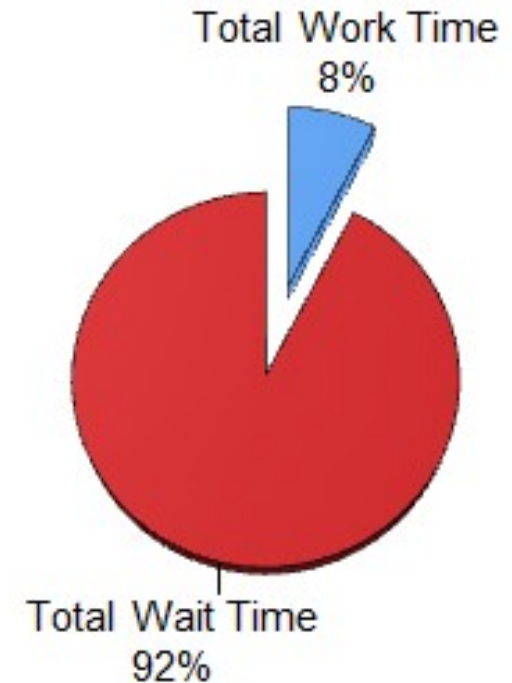
- **47 Value Add:**
  - Add Agency
  - Terminate Agency
- **9 Business Required:**
  - Validate License and Initiate Appointments
  - Generate ABC Exhibit
- **31 Non- Value Add:**
  - Compare ABC Exhibit to ADM 916
  - Request Agency Contact Update (re-routing)



## Process Cycle Time

### Cycle times (work time and wait time) for process activities were captured:

- < 10% time spent actively working
- Significant amount of time spent waiting, due to various delays in the process
- **Work time:**
  - Time spent actively working on process activity
- **Wait time:**
  - Time spent waiting, not actively working on activity:
  - E.g. for resources to be available, for task in queue to be assigned, for responses, for systems to update, etc.



## KPIs/SLAs

### KPIs & SLAs for Add Agency process captured:

#### ▪ KPI:

##### Average Add Agency Duration

- Turnaround time for adding an agency
  - agency added
  - underwriters assigned
  - agency contacts added
- Measured from ADM 916 received to completion e-mail
- Currently this is 15 business days

#### ▪ SLA:

##### Add Agency SLA = 24 hours

- SLA for adding an agency
  - agency added
  - underwriters assigned
- Underwriter Admin area
- Measured from ADM 916 received to underwriters assigned
- Note: It is *impossible* to achieve this SLA with current process, due to wait for Regulatory Compliance creation of Agent Number



## Process Inventory – Validated To-Be Processes – Mar. 14

Process	Problems	Steps	Participants	Inputs / Outputs	Cycle Times (total work/wait time all activities)	Systems Integration / Integration Points / Swivel Chair	KPIs & SLAs
Add Branch Office	4	6	3	8/8	4hr /22 days	3/4/9	1/1
Add Branch Office Contact	5	9	6	6/6	25min/2 days	2/5/2	1/1
Update Branch Office Contact, Authority, and Privileges (Sub)	4	5	3	5/3	45min/1 day	2/5/4	1/1
Archive Deactivated Accounts	0	4	2	4/4	40 min/up to 30 days to wait for response	4/8/4	1/1
Manage Access to External Reports	2	4	4	6/6	20min/2 days	2/3/2	1/1
Manage Branch Office Authority	5	8	4	9/5	3 hr 50 min / none captured	3/5/10	1/1
Manage Underwriter/Assistant Underwriter Assignments	5	3	2	0/1	5 min / none captured	1/1/0	1/1
Review Run-off Requirements (Sub)	0	2	2	3/3	1 hr 30 min/1 day	2/2/4	1/1
Update Branch Office Information	5	8	6	11/9	1 hr 15 min /none captured	3/7/5	1/1
Assign Underwriter Service (Sub)	5	2	1	3/3	10 min	2/3/5	1/1

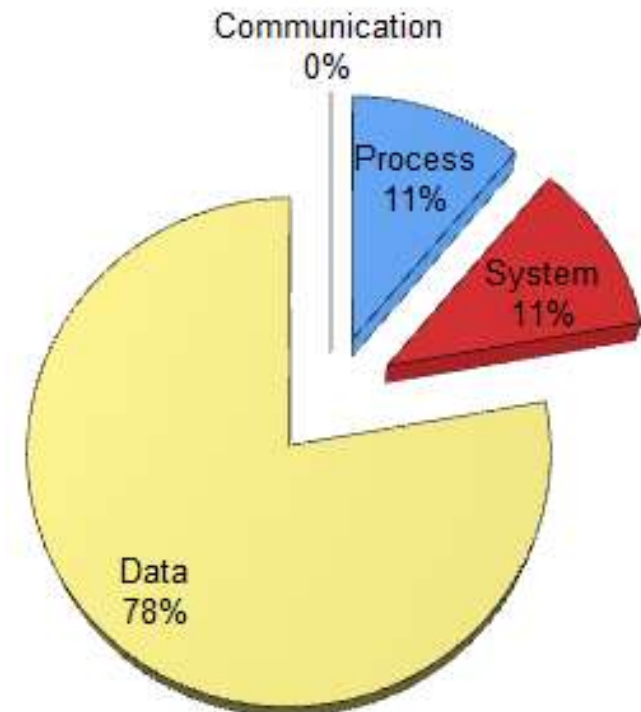
## Process Inventory – Validated Additional To-Be Processes – Mar. 31

Process	Problems	Steps	Participants	Inputs / Outputs	Cycle Times (total work / wait time all activities)	Systems	KPIs& SLAs
Find Branch Office Service (sub)	None identified	1	1	1/1	5 min ./ no wait	1	
Find Producer Service (sub)	None identified	1	1	1/1	5 min ./ no wait	1	
Find Underwriter/Assistant Underwriter Service (sub)	None identified	1	1	1/1	5 min ./ no wait	1	
Mailing List Management	2	3	2	3/3	1 day 35 min / 3 days	2	1/1
View ABC Exhibit Service (sub)	None identified	1	1	3/3	15 min ./ no wait	1	

## Process Problems

### **58 Process problems in As-Is processes were reduced to 20 process problems in To-Be processes**

- MDM addresses many data issues, but problems still exist due to the manual updates to multiple systems accessed by swivel chair
- Some problems were not eliminated, but the severity of the problems were reduced, due to the process redesigns.
- Communications were improved with the process automatically notifying interested parties about changes and managing the hand-off of activities from one role to another.



# Systems

Systems	Integration or Swivel Chair	Total # of Processes / Services Used By
WINS	Swivel Chair	5
MDM	Integration	15
CATS	Swivel Chair	6
GA Admin Tool	Swivel Chair	2
HP Service Center	Swivel Chair	0
LDAP	Integration	5
Lotus Notes	Integration	8
National Insurance Producer Registry (NIPR)	Swivel Chair	2
OmniView	Swivel Chair	4
SIC Portal	Swivel Chair	0
Sircon	Swivel Chair	1
SIRIS	Swivel Chair	1
State Dept of Insurance (DOI) website	Swivel Chair	2
Submission Manager	Swivel Chair	0
Network Drive (file system)	Integration	1
ACT	Swivel Chair	7
Agency Reporting Admin Tool	Swivel Chair	1

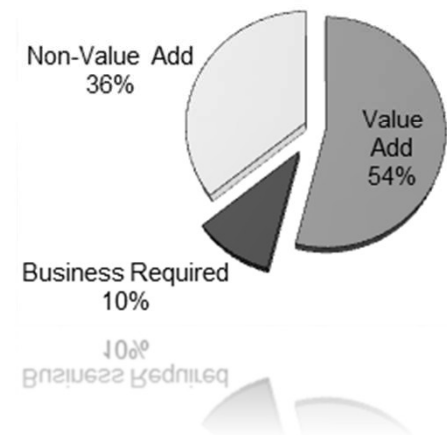
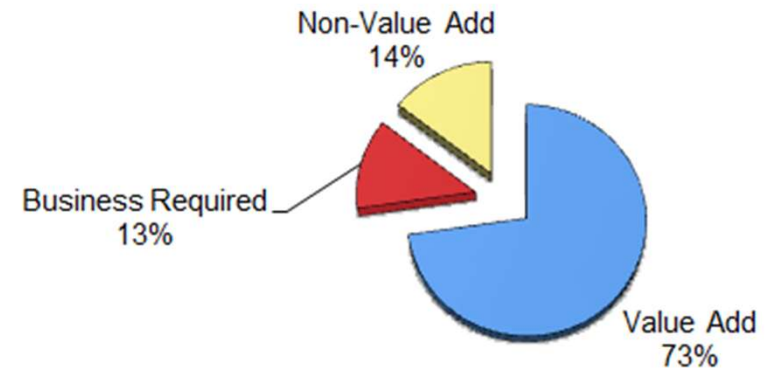
## Process Value Add

**55 Process activities in To-Be processes were categorized :**

- **40 Value Add**
- **7 Business Required**
- **8 Non- Value Add**

Reduction of Non-Value Add from 36% overall (As-Is) to 14 % overall (To-Be)

Note: New query services and Mailing List Management process contain no Non-Value Add activities



## Process Cycle Time

**Cycle times (work time and wait time) for To-Be process activities were estimated:**

- Overall reductions in work and wait time across all processes
- Work time reduced by nearly 75% overall
- Wait time reduced by nearly 64% overall

## KPIs/SLAs

### **KPIs & SLAs for To-Be processes captured:**

#### **– KPIs:**

Average Process Duration – per process

- Average turnaround time for each process
- Measured from initial task to enter information to completion e-mail

#### **– SLA:**

Add Branch Office SLA = 5 days

Updates to Branch Offices/Contacts SLA = 24 hours

Mailing List Management SLA = 3 days

- Total completion time for each process
- Measured from initial task to enter information to completion e-mail

## Estimation Methods: Overview

- **Assess Business Impact and Overall Effort**

This estimate happens during process identification as you build your process.

- **Rough Order Magnitude (ROM)**

A low precision and accuracy estimate used to build a business case for further process documentation and analysis. This estimate can be used in a business case to justify a project charter for process implementation.

- **Procure Funds with Budgetary Estimate**

With added precision and accuracy, this estimate is used for initial planning (cost, resources, and schedule) and is based on the outcome of process discovery and analysis.

- **Plan Project with Detailed Estimate**

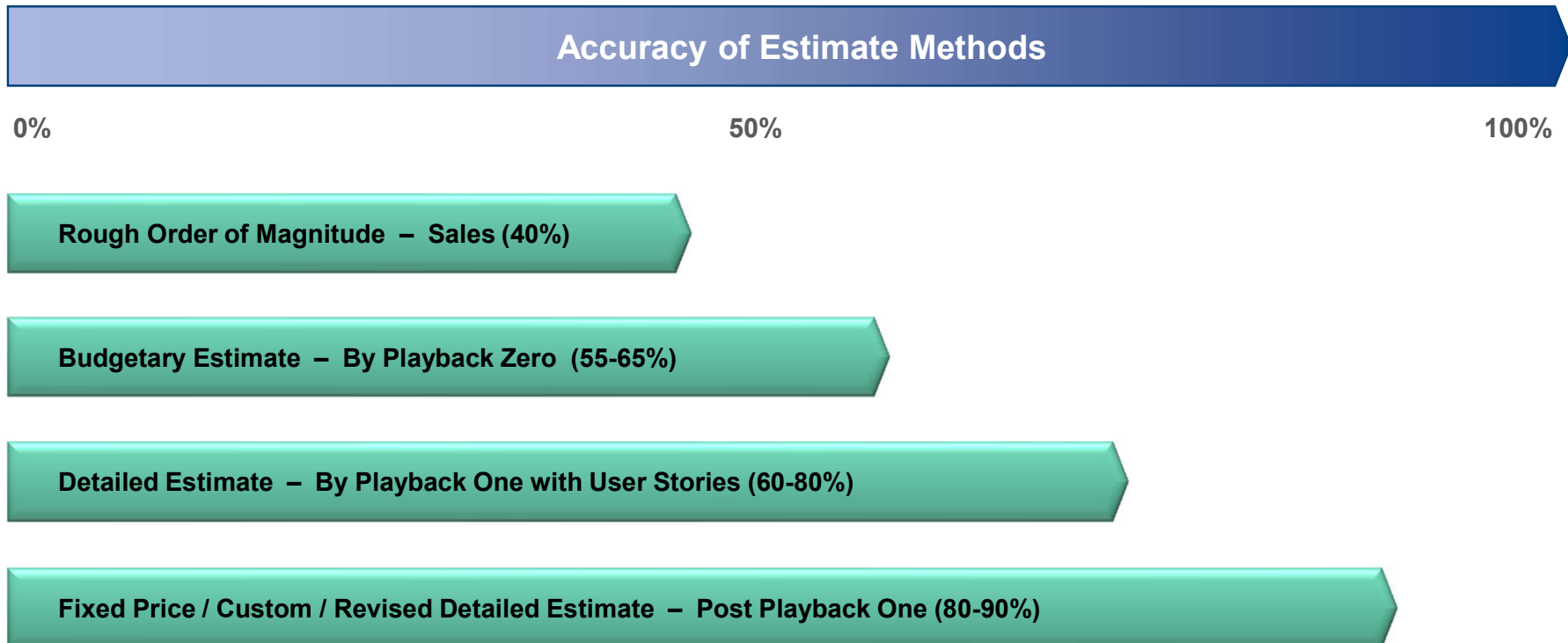
With refined precision and accuracy, this estimate first appears during the first development iteration. This estimate is based on story points, used to bucket work to iterations, and commit assignments to developers, and should anticipate change as a percentage.

- **Commit schedule with Revised Estimate**

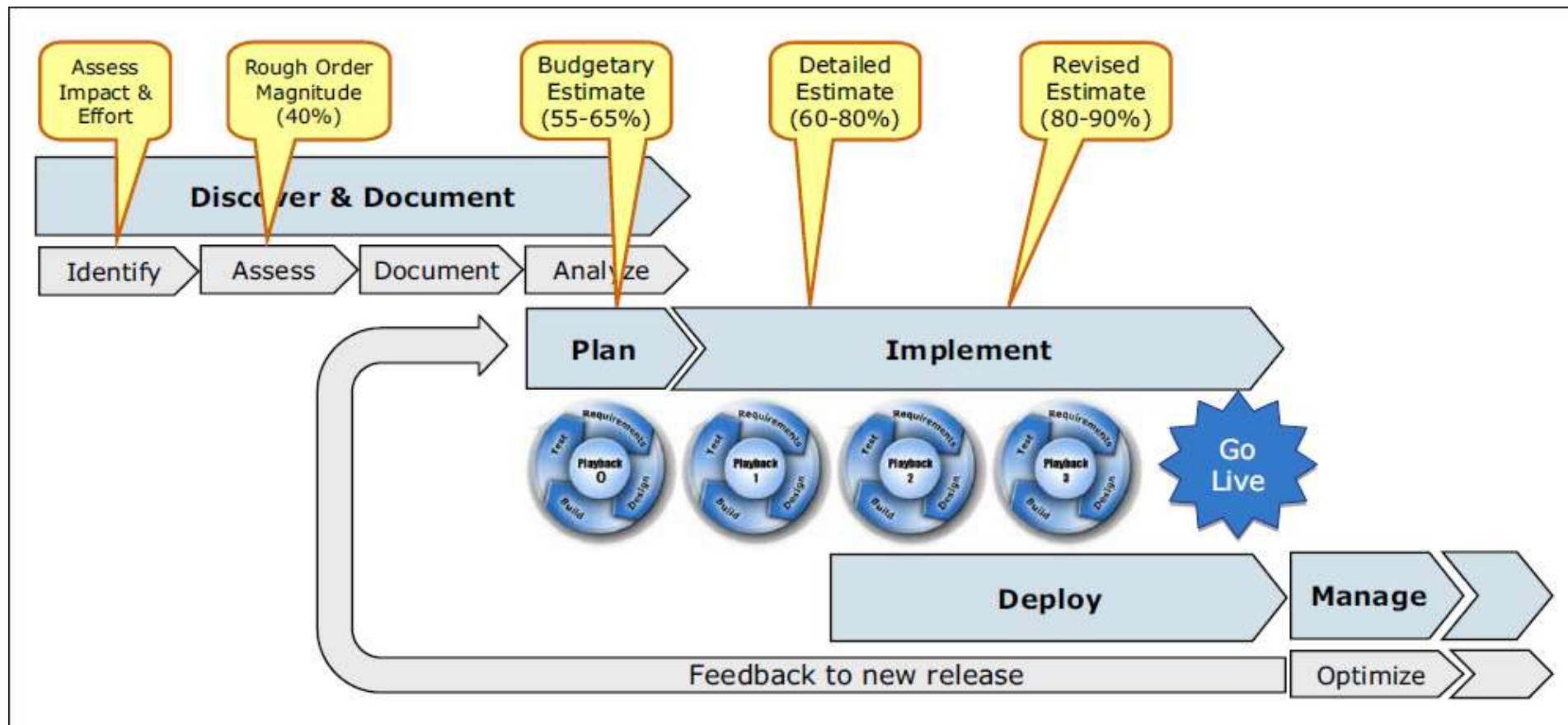
An updated detailed estimate based on actual story point velocity from multiple iterations.



## Estimation Methods: Accuracy of Methods



# Estimation Methods: In Project Life Cycle



# Estimation Methods: Overview

See the [scaling BPM Adaptation \(From Project to Program IBM Business Process Manager\) Redbook](#) Section 4.3 Estimating the BPM Project scope.

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- **Commit schedule with Revised Estimate**

An updated detailed estimate based on actual story point velocity from multiple iterations.

# Estimation Methods: Overview

- Assess Business Impact and Overall Effort

This estimate happens during process identification as you build your process.

- Rough Order Magnitude (ROM)

A low precision and accuracy estimate used to build a business case for further process documentation and analysis. This estimate can be used in a business case to justify a project charter for process implementation.

- Procure Funds with Budgetary Estimate

With added precision and accuracy, this estimate is used for initial planning (cost, resources, and schedule) and is based on the outcome of process discovery and analysis.

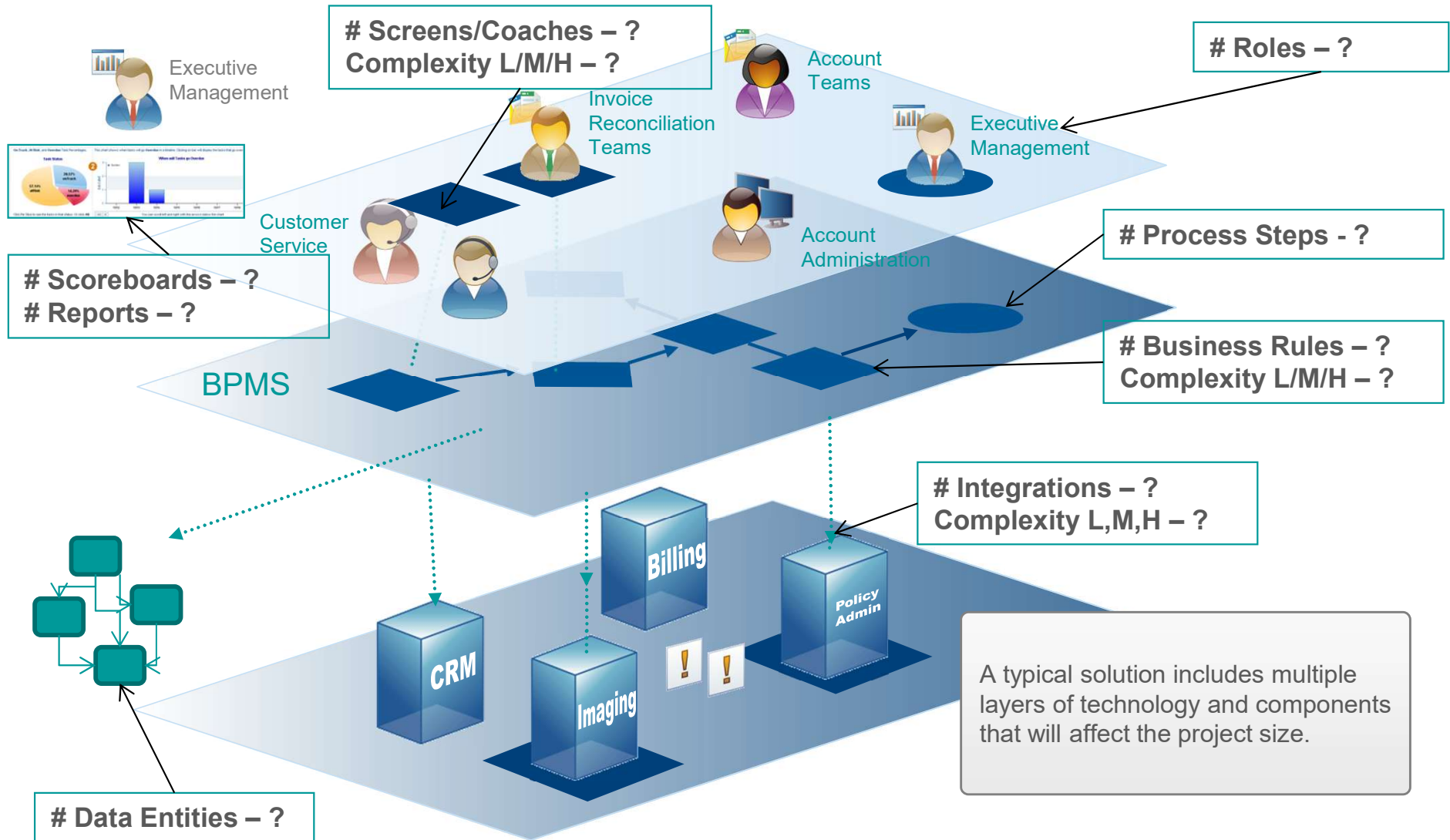
- Plan Project with Detailed Estimate

With refined precision and accuracy, this estimate first appears during the first development iteration. This estimate is based on story points, used to bucket work to iterations, and commit assignments to developers, and should anticipate change as a percentage.

- Commit schedule with Revised Estimate

An updated detailed estimate based on actual story point velocity from multiple iterations.

# Estimation Methods: Complexity Considerations



## Estimation Methods: ROM Overview and Example

Implementation complexity	Low	Medium	High	Example Process*
Process Analysis	Yes	Yes	Yes	Yes
Top Level Business Processes	1	1	2	1: LOW
Lower Level Business Processes	5	7	10	9: HIGH
Process Steps/Activities	15	30	60	27: MED
Participant Groups	3	5	10	6: HIGH
Coaches low /medium complexity	10 / 5	15 / 7	20 / 10	14: MED / 0: LOW
Business Entities	5	15	30	6: MED
Rules (Low/ Medium Complexity)	5 / 0	7 / 2	10 / 5	3: LOW
Basic Reports & Dashboards	4	6	8	2: LOW
System Integrations	2	3	4	4: HIGH
Construction phase duration	~10 weeks	~14 weeks	~20+ weeks	14-16 weeks
Developer Hours	900-1,500	1,500-2,500	2,500-5,000	2,500-3,000
Number of Developers	2-3	3-4	4-5	4 developers

\*These numbers are provided as an example to demonstrate the method end result and  
 • should be replaced with actual numbers identified during analysis.

## Nationwide - ROM for All Processes

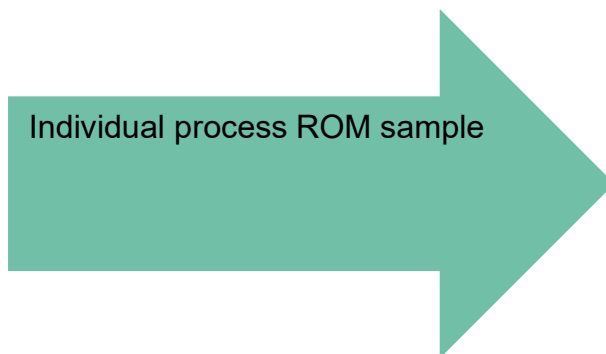
Implementation complexity	Low	Medium	High	Nationwide Process[es]
Process Analysis	Yes	Yes	Yes	Yes
Top Level Business Processes	1	1	2	7:High
Lower Level Business Sub-Processes	5	7	10	3:Low
Process Steps/Activities	15	30	60	55:High
Participant Groups	3	5	10	8:High
Coaches low complexity	10	15	20	12:Med
Coaches medium complexity	5	7	10	11:High
Coaches high complexity	0	0	1	3:High
Business Entities	5	15	30	5
Rules (Low/ Medium Complexity)	5/0	7/2	10/5	5
Basic Reports & Dashboards	4	6	8	2
System Integration(System/ Integration Point)	2	3	4	4:High
<b>Implementation Duration</b>	~10 weeks	~14 weeks	~20+ weeks	Up to 52 weeks
<b>Developer Hours</b>	900-1,500	1,500-2,500	2,500-5,000	5,000-11,000
<b>Number of Developers</b>	2-3	3-4	4-5	4-5

Disclaimer: This estimate does not include cost or time for a BPM analyst, BPM program manager, BPM SA, testing, deployment, or SME participation

## Nationwide - ROM Numbers Explained

ROM Estimate for All processes:

- Duration:
  - mid-point between High category value and aggregation of duration from individual ROM estimates for all processes
- Developer Hours:
  - lower boundary = upper boundary of the High category
  - upper boundary = aggregation of all processes



Implementation complexity	Low	Medium	High	Nationwide Process[es]
<b>Add Branch Office Analysis</b>	Yes	Yes	Yes	Yes
Top Level Business Processes	1	1	2	1: Low
Lower Level Business Sub-Processes	5	7	10	2: Low
Process Steps/Activities	15	30	60	5: Low
Participant Groups	3	5	10	4: Med
Coaches low complexity	10	15	20	3: Low
Coaches medium complexity	5	7	10	3: Low
Coaches high complexity	0	0	1	1: High
Business Entities	5	15	30	5: Low
Rules (Low/ Medium Complexity)	5/0	7/2	10/5	5: Low
Basic Reports & Dashboards	4	6	8	2:Low
System Integration(System/ Integration Point)	2	3	4	4: High
Implementation Duration	~10 weeks	~14 weeks	~20+ weeks	~14-16 weeks
Developer Hours	900-1,500	1,500-2,500	2,500-5,000	2,500-3,000
Number of Developers	2-3	3-4	4-5	4



## Nationwide – Add Branch Office top-level process

Implementation complexity	Low	Medium	High	Nationwide Process[es]
Process Analysis	Yes	Yes	Yes	Yes
Top Level Business Processes	1	1	2	1: Low
Lower Level Business Sub-Processes	5	7	10	2: Low
Process Steps/Activities	15	30	60	5: Low
Participant Groups	3	5	10	4: Med
Coaches low complexity	10	15	20	3: Low
Coaches medium complexity	5	7	10	3:Low
Coaches high complexity	0	0	1	1: High
Business Entities	5	15	30	5:Low
Rules (Low/ Medium Complexity)	5/0	7/2	10/5	5: Low
Basic Reports & Dashboards	4	6	8	2:Low
System Integration(System/ Integration Point)	2	3	4	4: High
<b>Implementation Duration</b>	~10 weeks	~14 weeks	~20+ weeks	~14-16 weeks
<b>Developer Hours</b>	900-1,500	1,500-2,500	2,500-5,000	2,500-3,000
<b>Number of Developers</b>	2-3	3-4	4-5	4

- Assign UW Service  
- Update Branch Office  
Contact, Authority &  
Privileges sub-process

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## Nationwide – Manage Branch Office Authority top-level process

Implementation complexity	Low	Medium	High	Nationwide Process[es]
Process Analysis	Yes	Yes	Yes	Yes
Top Level Business Processes	1	1	2	1: Low
Lower Level Business Sub-Processes	5	7	10	2: Low
Process Steps/Activities	15	30	60	8: Low
Participant Groups	3	5	10	4: Med
Coaches low complexity	10	15	20	2: Low
Coaches medium complexity	5	7	10	2: Low
Coaches high complexity	0	0	1	2: High
Business Entities	5	15	30	5:Low
Rules (Low/ Medium Complexity)	5/0	7/2	10/5	5:Low
Basic Reports & Dashboards	4	6	8	2:Low
System Integration(System/ Integration Point)	2	3	4	3:Med
<b>Implementation Duration</b>	~10 weeks	~14 weeks	~20+ weeks	~ 14-15 weeks
<b>Developer Hours</b>	900-1,500	1,500-2,500	2,500-5,000	2,500-3,000
<b>Number of Developers</b>	2-3	3-4	4-5	3

- Assign UW Service  
- Run-off Review Requirements

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## Nationwide – Manage Branch Office Contact top-level process

Implementation complexity	Low	Medium	High	Nationwide Process[es]
Process Analysis	Yes	Yes	Yes	Yes
Top Level Business Processes	1	1	2	1: Low
Lower Level Business Sub-Processes	5	7	10	1: Low
Process Steps/Activities	15	30	60	13:Low
Participant Groups	3	5	10	7:High
Coaches low complexity	10	15	20	1:Low
Coaches medium complexity	5	7	10	2:Low
Coaches high complexity	0	0	1	-
Business Entities	5	15	30	5:Low
Rules (Low/ Medium Complexity)	5/0	7/2	10/5	5:Low
Basic Reports & Dashboards	4	6	8	2:Low
System Integration(System/ Integration Point)	2	3	4	3:Med
<b>Implementation Duration</b>	~10 weeks	~14 weeks	~20+ weeks	~14 weeks
<b>Developer Hours</b>	900-1,500	1,500-2,500	2,500-5,000	1,500-2,500
<b>Number of Developers</b>	2-3	3-4	4-5	3

- Update Branch Office Contact, Authority & Privileges sub-process

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## Nationwide – Update Branch Office Info top-level process

Implementation complexity	Low	Medium	High	Nationwide Process[es]
Process Analysis	Yes	Yes	Yes	Yes
Top Level Business Processes	1	1	2	1:Low
Lower Level Business Sub-Processes	5	7	10	-
Process Steps/Activities	15	30	60	8:Low
Participant Groups	3	5	10	6:Med
Coaches low complexity	10	15	20	2:Low
Coaches medium complexity	5	7	10	1:Low
Coaches high complexity	0	0	1	-
Business Entities	5	15	30	5:Low
Rules (Low/ Medium Complexity)	5/0	7/2	10/5	5:Low
Basic Reports & Dashboards	4	6	8	2:Low
System Integration(System/ Integration Point)	2	3	4	3:Med
<b>Implementation Duration</b>	~10 weeks	~14 weeks	~20+ weeks	~10-12 weeks
<b>Developer Hours</b>	900-1,500	1,500-2,500	2,500-5,000	1,500
<b>Number of Developers</b>	2-3	3-4	4-5	3

Disclaimer: This estimate does not include cost or time for a BPM analyst, BPM program manager, BPM SA, testing, deployment, or SME participation

## Nationwide – Manage Access to External Reports top process

Implementation complexity	Low	Medium	High	Nationwide Process[es]
Process Analysis	Yes	Yes	Yes	Yes
Top Level Business Processes	1	1	2	1:Low
Lower Level Business Sub-Processes	5	7	10	1:Low
Process Steps/Activities	15	30	60	13:Low
Participant Groups	3	5	10	6:High
Coaches low complexity	10	15	20	3:Low
Coaches medium complexity	5	7	10	1: Low
Coaches high complexity	0	0	1	-
Business Entities	5	15	30	5:Low
Rules (Low/ Medium Complexity)	5/0	7/2	10/5	5:Low
Basic Reports & Dashboards	4	6	8	2:Low
System Integration(System/ Integration Point)	2	3	4	3:Med
<b>Implementation Duration</b>	~10 weeks	~14 weeks	~20+ weeks	~14 weeks
<b>Developer Hours</b>	900-1,500	1,500-2,500	2,500-5,000	1,500-2,500
<b>Number of Developers</b>	2-3	3-4	4-5	3

- Update Branch Office Contact, Authority & Privileges sub-process

Disclaimer: This estimate does not include cost or time for a BPM analyst, BPM program manager, BPM SA, testing, deployment, or SME participation

## Nationwide – Manage UW Assignments top-level process

Implementation complexity	Low	Medium	High	Nationwide Process[es]
Process Analysis	Yes	Yes	Yes	Yes
Top Level Business Processes	1	1	2	1: Low
Lower Level Business Sub-Processes	5	7	10	1:Low
Process Steps/Activities	15	30	60	3:Low
Participant Groups	3	5	10	2:Low
Coaches low complexity	10	15	20	-
Coaches medium complexity	5	7	10	2: Low
Coaches high complexity	0	0	1	-
Business Entities	5	15	30	5:Low
Rules (Low/ Medium Complexity)	5/0	7/2	10/5	5:Low
Basic Reports & Dashboards	4	6	8	2:Low
System Integration(System/ Integration Point)	2	3	4	2:Low
<b>Implementation Duration</b>	~10 weeks	~14 weeks	~20+ weeks	~10 weeks
<b>Developer Hours</b>	900-1,500	1,500-2,500	2,500-5,000	900-1,500
<b>Number of Developers</b>	2-3	3-4	4-5	2

- Assign UW Service

Disclaimer: This estimate does not include cost or time for a BPM analyst, BPM program manager, BPM SA, testing, deployment, or SME participation

## Nationwide – Archive Deactivated Accounts top-level process

Implementation complexity	Low	Medium	High	Nationwide Process[es]
Process Analysis	Yes	Yes	Yes	Yes
Top Level Business Processes	1	1	2	1:Low
Lower Level Business Sub-Processes	5	7	10	-
Process Steps/Activities	15	30	60	4:Low
Participant Groups	3	5	10	2:Low
Coaches low complexity	10	15	20	2:Low
Coaches medium complexity	5	7	10	-
Coaches high complexity	0	0	1	-
Business Entities	5	15	30	5:Low
Rules (Low/ Medium Complexity)	5/0	7/2	10/5	5:Low
Basic Reports & Dashboards	4	6	8	2:Low
System Integration(System/ Integration Point)	2	3	4	3:Med
<b>Implementation Duration</b>	~10 weeks	~14 weeks	~20+ weeks	~12 weeks
<b>Developer Hours</b>	900-1,500	1,500-2,500	2,500-5,000	1,500
<b>Number of Developers</b>	2-3	3-4	4-5	3

Disclaimer: This estimate does not include cost or time for a BPM analyst, BPM program manager, BPM SA, testing, deployment, or SME participation

## Nationwide – Mailing List Management top-level process

Implementation complexity	Low	Medium	High	Nationwide Process
Process Analysis	Yes	Yes	Yes	Yes
Top Level Business Processes	1	1	2	1:Low
Lower Level Business Sub-Processes	5	7	10	-
Process Steps/Activities	15	30	60	3:Low
Participant Groups	3	5	10	2:Low
Coaches low complexity	10	15	20	4:Low
Coaches medium complexity	5	7	10	2:Low
Coaches high complexity	0	1	5	-
Business Entities	5	15	30	5:Low
Rules (Low/ Medium Complexity)	5/0	7/2	10/5	5:Low
Basic Reports & Dashboards	4	6	8	2:Low
System Integration (System/ Integration Point)	2	3	4	2:Low
<b>Implementation Duration</b>	~10 weeks	~14 weeks	~20+ weeks	~10 weeks
<b>Developer Hours</b>	900-1,500	1,500-2,500	2,500-5,000	800-1,000
<b>Number of Developers</b>	2-3	3-4	4-5	2

Disclaimer: This estimate does not include cost or time for a BPM analyst, BPM program manager, BPM SA, testing, deployment, or SME participation



## Nationwide – Query Services

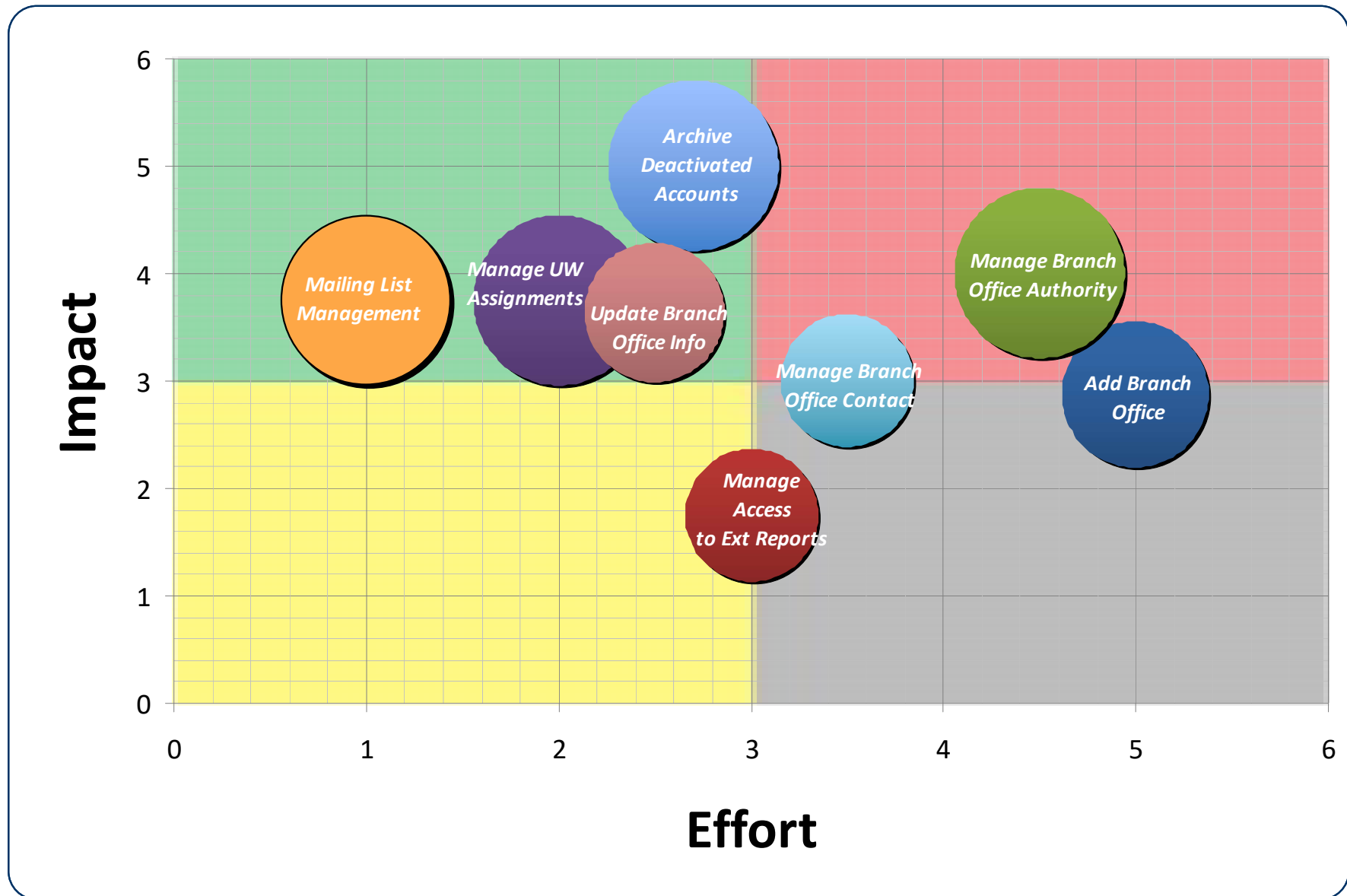
Implementation complexity	Low	Medium	High	Nationwide Process
Process Analysis	Yes	Yes	Yes	Yes
Top Level Business Processes	1	1	2	-
Lower Level Business Sub-Processes	5	7	10	4:Low
Process Steps/Activities	15	30	60	4:Low
Participant Groups	3	5	10	2:Low
Coaches low complexity	10	15	20	3:Low
Coaches medium complexity	5	7	10	4:Low
Coaches high complexity	0	1	5	-
Business Entities	5	15	30	5:Low
Rules (Low/ Medium Complexity)	5/0	7/2	10/5	5:Low
Basic Reports & Dashboards	4	6	8	2:Low
System Integration (System/ Integration Point)	2	3	4	1:Low
<b>Implementation Duration</b>	~10 weeks	~14 weeks	~20+ weeks	~8 weeks
<b>Developer Hours</b>	900-1,500	1,500-2,500	2,500-5,000	600-800
<b>Number of Developers</b>	2-3	3-4	4-5	2

Disclaimer: This estimate does not include cost or time for a BPM analyst, BPM program manager, BPM SA, testing, deployment, or SME participation

## Prioritization Criteria

- **Prioritization** uses **three sources of criteria** to arrive at a **ranked view** of the processes:
- **Success** Criteria – highest chance of project success
  - Business Complexity
  - Process Complexity
  - Business Commitment
  - IT Commitment
  - BPM Visibility
  - Financial Impact
- **Impact** Criteria – highest impact improvements
  - Alignment with Goals
  - Reduced Problems
  - Reduced Non-Value Add Activities
  - Reduced Work and Wait Time
- **Effort** Criteria – lowest effort to develop
  - Rough Order of Magnitude (ROM) BPM Development Effort

## Prioritization Results - Graph

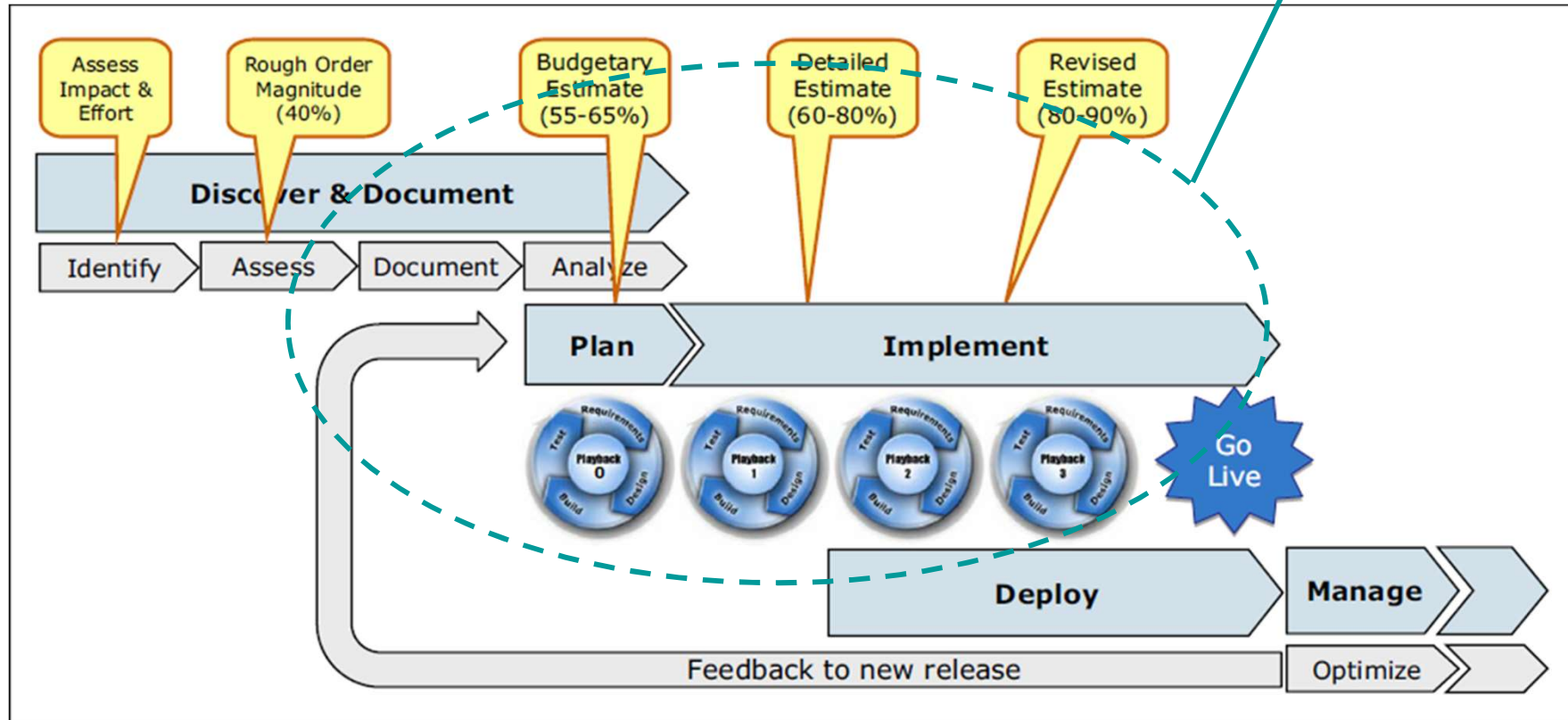


# Prioritization Results – Recommended Roadmap

1. **Process Inventory Completion**
  - To-Be process design for remaining processes
    - Branch Office Query requirements
    - MDM Governance requirements
  - *Rationale:*
    - Additional requirements in scope for Phase III, but not yet captured
2. **Key architectural decisions, including BPM integrating with external systems, to be taken, prior embarking on the BPM development**
3. **Development Project 1 – Quick Win (Expert led )**
  - [Add Branch Office process](#) with the following sub-processes:
    - [Update Branch Office Contact, Authority & Privileges sub-process](#)
    - [Assign UW Service](#)
    - [Consider development of related query services: Find Branch Office Service, Find Underwriter/Assistant Underwriter Service](#)
  - *Rationale:*
    - Provide Business and IT foundation of re-usable components
    - Establish core business functionality despite presence of Swivel Chair activities
    - Due to higher risk and complexity, recommended to be an expert led pilot
4. **Development Project 2 – Quick Win Enablement (Expert enabled)**
  - [Manage Branch Office Contact process](#) with re-use of the following sub-process:
    - [Update Branch Office Contact, Authority & Privileges sub-process](#)
  - [Manage UW Assignment process](#) with re-use of the following service:
    - [Assign UW Service](#)
  - *Rationale:*
    - Highest business impact
    - High chance of success due to low complexity
    - Low effort due to re-use factor of the components built earlier
    - Combining mentoring and execution activities lengthens duration, but duration is lower for these processes
5. **Development Project 3**
  - [Archive Deactivated Accounts process](#)
  - [Manage Branch Office Authority process](#)
    - [Review Run-off Requirements child process](#)
    - [Consider development of related query service: Find Producers Service, View ABC Exhibit Service](#)
  - [Update Branch Office Info process](#)
  - [Mailing List Management process](#)
  - [Manage Access to External Reports process](#)
  - *Rationale:*
    - Processes above listed in order of their impact according to the Prioritization graph. Processes with the highest impact are listed first.

# BPM Project Lifecycle

Process Development Focus



**Iterative** method for project delivery

Each iteration ends in a **Playback** to gain consensus, sign-off and feedback

Process **Discovery, Analysis** and **Design in Blueworks Live**

Process **Implementation** in **Process Designer** and **Integration Designer**

**Continuous improvement approach** feeds new enhancements and defects into each iteration

**Feedback** from metrics in running solution **used to improve** solution in following releases

धन्यवाद  
Hindi

多謝  
Traditional Chinese

*Grazie*  
Italian

ขอบพระคุณ  
Thai

Gracias  
Spanish

Спасибо  
Russian

Obrigado

Brazilian Portuguese

多谢  
Simplified Chinese

நன்றி  
Tamil

ありがとうございました  
Japanese

감사합니다  
Korean

Merci  
French

شكراً  
Arabic

Danke  
German

