

PLANNING A PILOT



3-CUBED

DESIGN THINKING



AUGMENTED INTELLIGENCE

OPTIMIZED OPERATIONS



30% BETTER, 3X FASTER
3X MORE ASSURED

PROOF OF CONCEPT



Rationale

1. Generate value through a rapid, implementable solution for the project(s) chosen
2. Understand the power of the tool and the analytics available
 - Create 3-Cubed champions in Transformation and Delivery
3. Create a template for roll-out to other processes, clients, and contract lifecycle stages



Assistance required

1. Select the right project
 - Familiarity with the breadth of 3-Cubed levers
 - Scale for tangible benefits
2. Small, motivated team with leadership involvement in decision making
 - Strong governance during project roll-out
3. Incentivize 3-Cubed adoption
 - Reward the pilot team with recognition and sharing success

MODEL SELECTION



SELECTING THE RIGHT MODEL

SCOPE

- ▶ As much **end-to-end** as possible
 - » Process adjacency and direct impact of upstream
 - » Fungibility of resources
 - » Include all variants within scope (systems, products, service type, locations)
 - » Common business objectives

OBJECTIVES

- ▶ 360° across **cost, clients and controls**
 - » Single objectives lead to sub-optimal solutions
- ▶ Get specific on the **desired metrics**
 - » Distinguish between levers and goals
 - ▢ Standardize < standardize for cost
 - ▢ Automate < Automate for control
- ▶ Set solution **constraints** to ensure focus
 - » The fewer the constraints the better the solution

CHARACTERISTICS

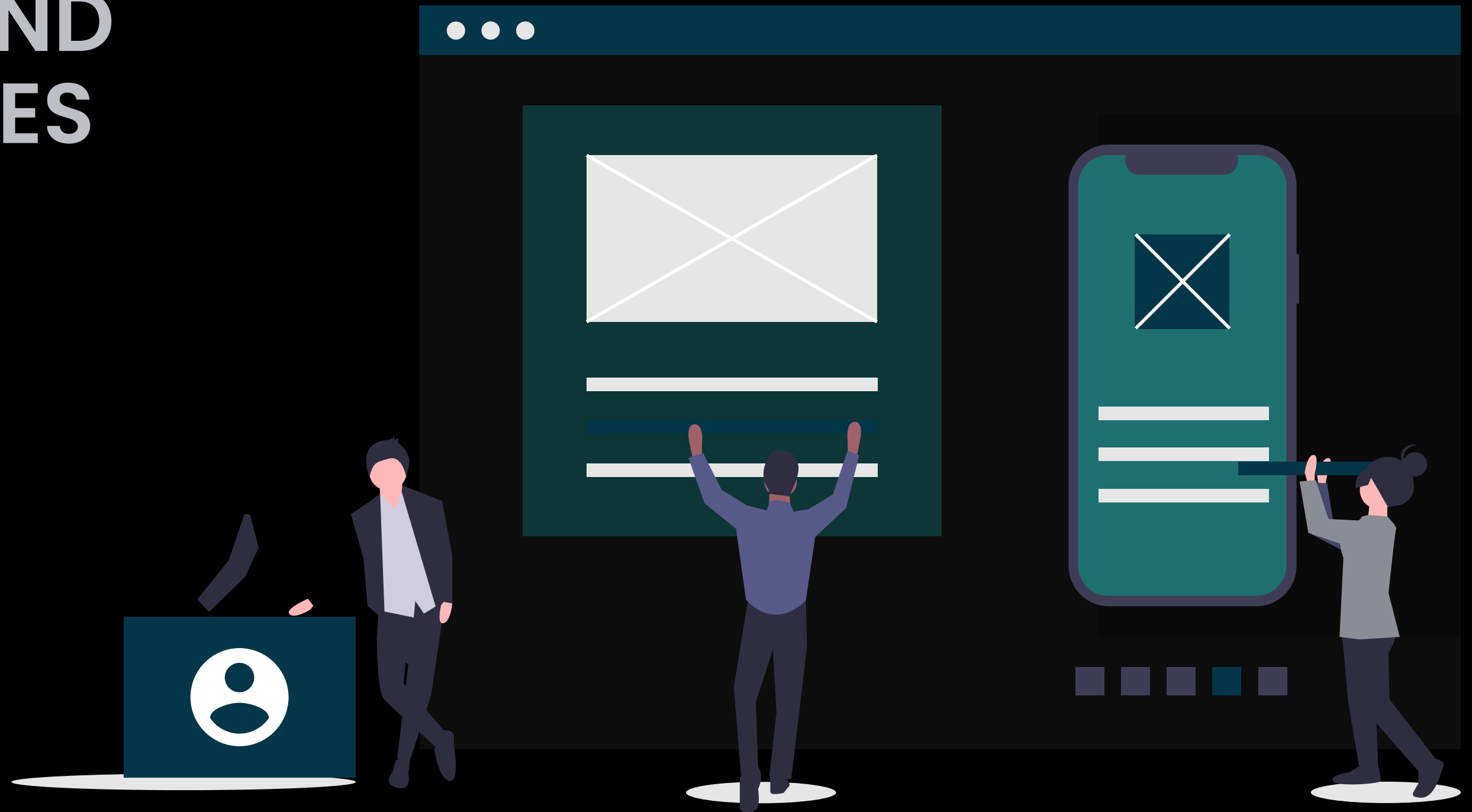
- ▶ End to end processes with **multiple** teams, locations, variants offer more levers to play with♣
 - » Don't try to protect 3-Cubed from complexity
- ▶ Algorithms optimized for **daily processes** rather than periodic activities

APPLICABLE LEVERS BY TYPES OF MODEL

Opportunity Sizing	Team Size 60+ ^{FTE}	Typical benefit 30%
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Project Characteristics	Target Levers	Explanation	Typical Benefit	Implementation	Constraints?
<ul style="list-style-type: none"> - Inflow spread over time, geographies - Cycle time ~ 1-5 days - End-to-end process with multiple hand-offs 	Work hours and shifts	<ul style="list-style-type: none"> - Reduce intra-day under utilization, - Optimize work window for deadlines 	0-15%	<ul style="list-style-type: none"> 🔑 "Team rostering 🔑 Schedule adherence" 	Coverage Hours?
<ul style="list-style-type: none"> - Multiple or redundant deadlines (SLAs) 	SLA rationalization	<ul style="list-style-type: none"> - Meet deadlines - Reduce impact of multiple deadlines 	5-15%	<ul style="list-style-type: none"> 🔑 Rostering 🔑 Scheduling 	Delays and deadlines
<ul style="list-style-type: none"> - Multiple or fragmented teams - Global footprint 	Work allocation Consolidation	<ul style="list-style-type: none"> - Work allocation between teams to: <ul style="list-style-type: none"> - Reduce intra-day peaks - Load balance across teams 	5-15%	<ul style="list-style-type: none"> 🔑 Team mergers 🔑 Specific cross training 🔑 Schedule adherence 	Team structure Systems accessed Control Efficacy
<ul style="list-style-type: none"> - Low first time right or multiple loops 	<ul style="list-style-type: none"> - Control review - Rework loops 	<ul style="list-style-type: none"> - Check reasons for loops including controls, training 	5-10%	<ul style="list-style-type: none"> 🔑 Team or Training 🔑 Edit Process or forms 🔑 Add or change control 	Team structure Change process Change controls
<ul style="list-style-type: none"> - Service centre type processes will likely rely heavily in effort reduction as the first lever; these include processes with short AHTs and long duration deadlines 	Effort reduction <ul style="list-style-type: none"> - Rework loops - Control review - NVA - Robots & Automation 	<ul style="list-style-type: none"> - Reduce rework time and effort - More rather than better controls - Self explanatory: May be overlap between current initiatives 	15-40%	<ul style="list-style-type: none"> 🔑 Process change 🔑 Automation 🔑 Process training 🔑 Work schedules 	Forms, Rules Control adequacy Process change Automation

TEAM AND TIMELINES



PROJECT TEAM AND FACILITATION PROVIDED

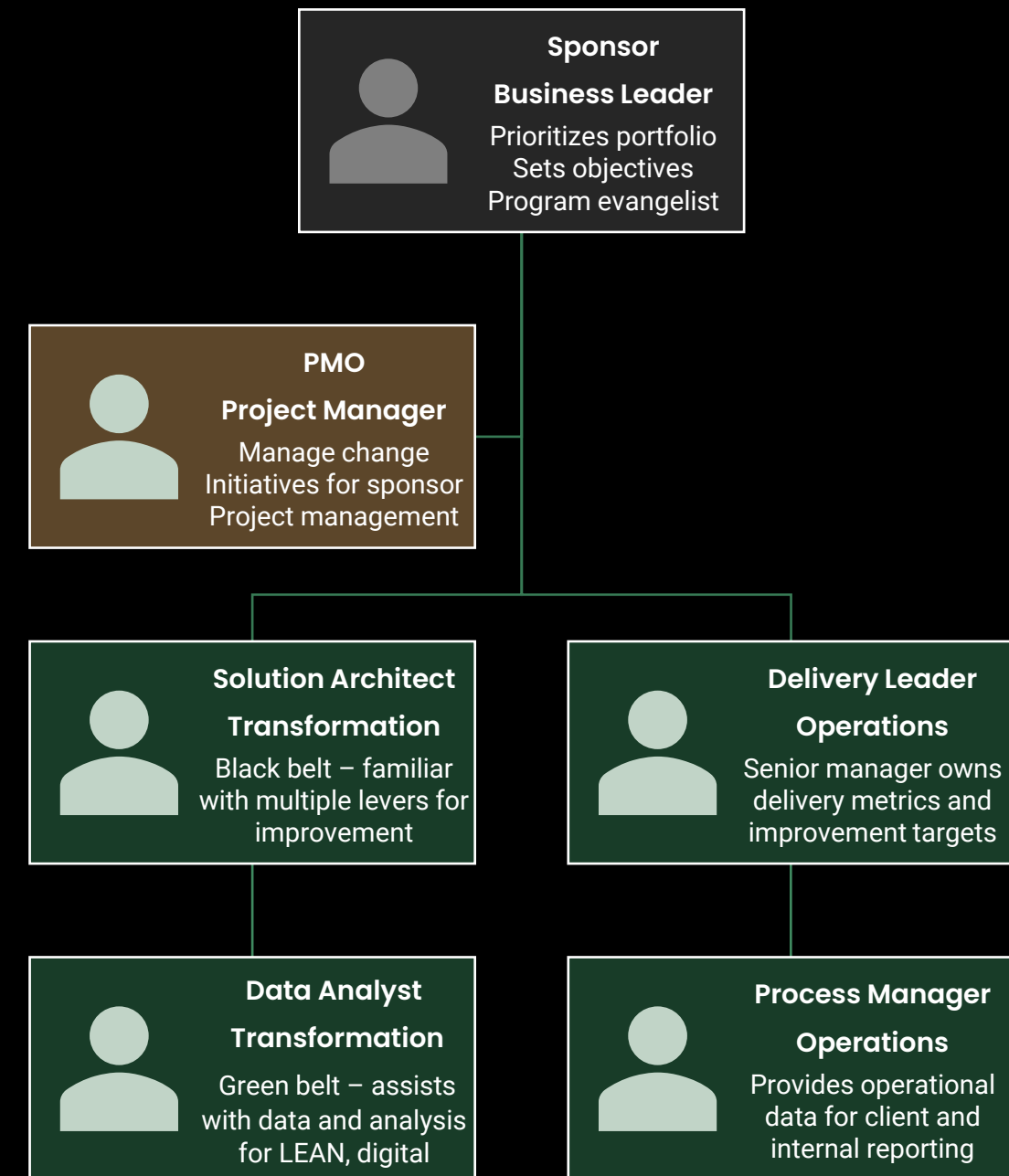
Workshop on scope and intent document characterizing project scope, objective setting, constraints and key risks

Project timelines, resource requirement, roles and responsibilities

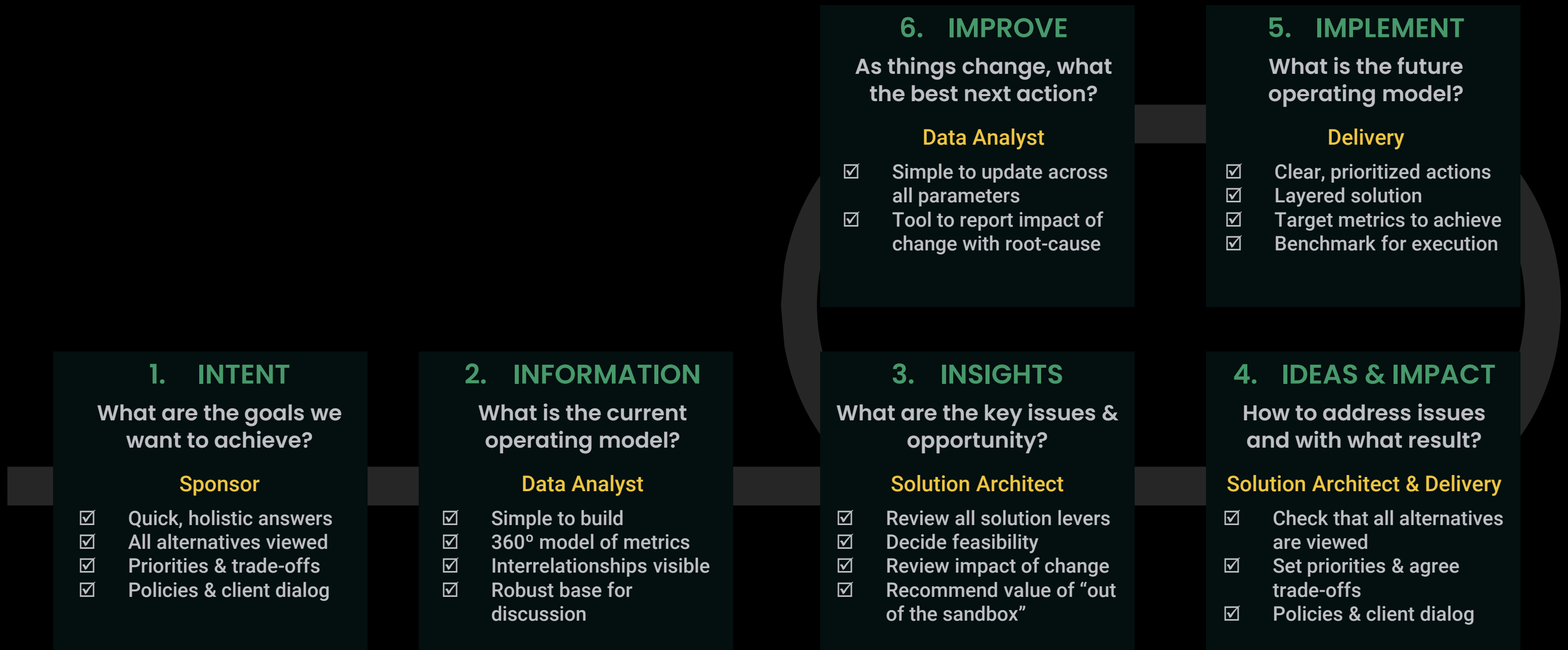
Training and support for model validation, issue identification and solution levers

Training and support for information gathering, model building and metrics validation

Familiarization and facilitation



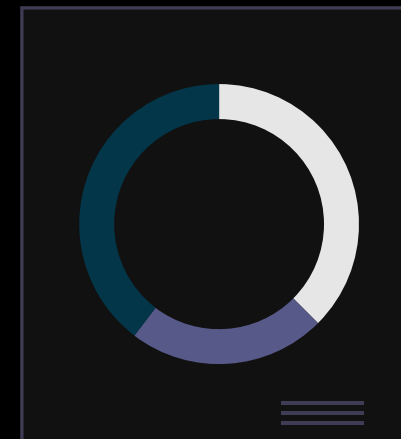
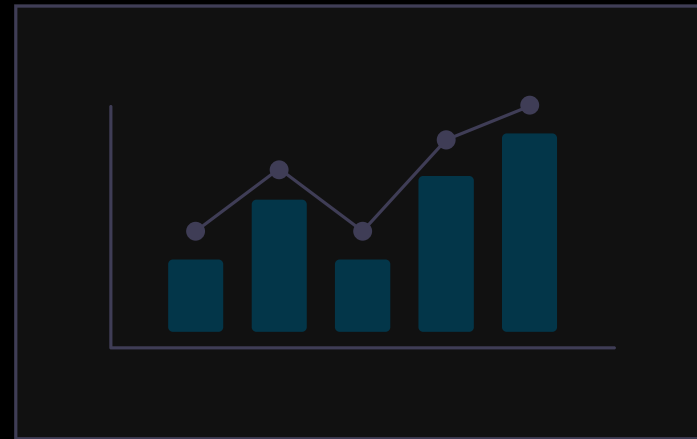
3-CUBED STAGES, AND THE **STAKEHOLDERS** THAT DRIVE THEM



TYPICAL HIGH LEVEL JOURNEY MAP

STAGE -- >	INITIATE	INPUT	INSIGHTS	IDEA GENERATION	IMPACT	IMPLEMENT
	Day 1	Week 1-3	Week 4	Week 5-6		+ Week 6
Key Stakeholders (Client)	Sponsor + Delivery Owner + Solution Architect	Data Analyst + Process Owner	Solution Architect + Delivery Owner	Solution Analyst + Delivery Owner + Functional Teams		Delivery Owner + Team Leads
Key Journey Steps	<ul style="list-style-type: none"> > Gather cross-functional process maps > Gather volumetric data 	<ul style="list-style-type: none"> > Update Process data > Update Teams & IT cost > Update Risk and Controls > Validate & Confirm 	<ul style="list-style-type: none"> > Issue identification using analytics and visualization 	<ul style="list-style-type: none"> > Possible solutions using decision trees > Solution hypotheses and test impact by lever 	<ul style="list-style-type: none"> > Build optimized operating model > Generate impact analysis report 	<ul style="list-style-type: none"> > Generate the implementation plan with priorities & milestones
Expected Outcome	<ul style="list-style-type: none"> > Understanding information requirements, sources and estimation where required 	<ul style="list-style-type: none"> > 360-degree 'As - Is' operating model > Consistent assumptions 	<ul style="list-style-type: none"> > Identifying key issues > Understanding the trade-offs, relevant levers 	<ul style="list-style-type: none"> > Solution Levers and Benefit > Immediate, Quick and Long-Term possibilities 	<ul style="list-style-type: none"> > Future state operating model and metrics > Interlinkage of steps to solve 	<ul style="list-style-type: none"> > Implementation steps > Initiative prioritization
What Client Does	<ul style="list-style-type: none"> > Identify key stakeholder > Gather & share data (template enclosed) 	<ul style="list-style-type: none"> > Build model on 3-Cubed > Confirm data & process owner sign off on 'as - is' 	<ul style="list-style-type: none"> > Agree and comment on opportunities, confirm if in line with current thought 	<ul style="list-style-type: none"> > Identify potential levers and build hypotheses for viable solutions 	<ul style="list-style-type: none"> > Simulations and sensitivity to validate hypotheses > Sign off on solution plan 	<ul style="list-style-type: none"> > Agree implementation timeline based on detailed steps and priorities
What Insource Does	<ul style="list-style-type: none"> > Check data format and portability to 3-Cubed 	<ul style="list-style-type: none"> > Model building workshop > Assist in building & resolve any modelling queries 	<ul style="list-style-type: none"> > Assist with 3-Cubed analytics in identifying root causes and build linkages 	<ul style="list-style-type: none"> > Workshop on solutioning > Assist in navigating the decision trees 	<ul style="list-style-type: none"> > Assist in identifying optimal trade-offs to achieve objective 	<ul style="list-style-type: none"> > Generate list of actions and future operating model

INFORMATION CHECKLIST



INFORMATION REQUIREMENT & SOURCES

 Click to View on YouTube

PROCESS MAP

Level 4 cross functional process maps



UNDESIRED OUTCOMES

Identify rejection paths in process map



TEAM SIZE & HOURS

Team size, location and work hours



PRODUCT

What flows through the process



VOLUME

Daily or period volumes and decision splits



AHT

Average Handle Time for effort estimate



WAIT TIMES

Planned wait periods between activities



DEADLINES

SLAs or regulatory deadlines in process



PERIODIC EFFORT

Effort and frequency of periodic activities



SYSTEMS

Systems and applications used



FORMS & RULES

Digital or physical forms and key fields



RISK & CONTROLS

Control objectives and selection of controls



TEAM SALARIES

Average salary per team by location



SEAT COST

Cost per seat or component by location



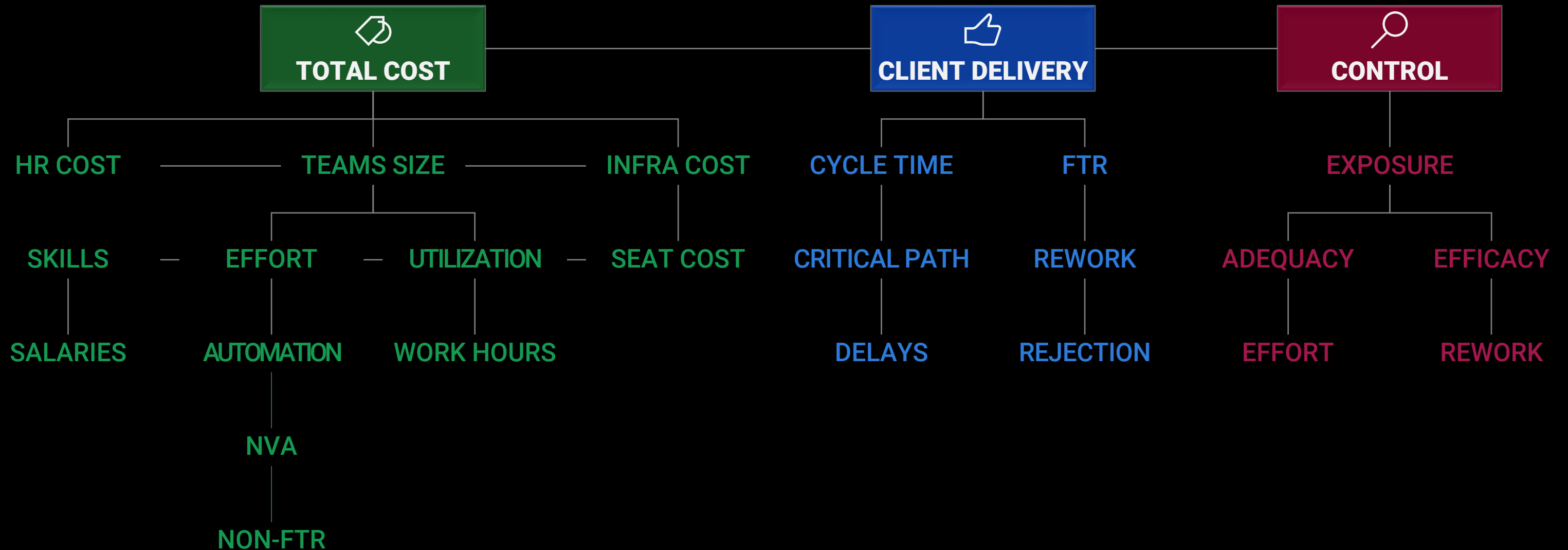
NVA CLASSIFICATION

Aided selection of NVA type activities



360° METRICS COMPUTED

Select all that you want to achieve



SOLUTION LEVERS TO RESOLVE ISSUES

Specify if any of these are constraints in solution design



PROCESS

[▶ CHANGE FLOW](#)

[▶ REWORK](#)

[▶ REJECT](#)

[▶ NVA](#)



RISK

[▶ LESS CONTROL](#)

[▶ ADD CONTROL](#)



OPERATION

[▶ WORK TIMING](#)

[▶ DEADLINES](#)

[▶ WAIT PERIODS](#)



FINANCE

[▶ TEAM COST](#)

[▶ COMPONENTS](#)



IT

[▶ AUTOMATION](#)



TEAMS

[▶ LOCATION](#)

[▶ ALLOCATE WORK](#)

[▶ MERGE TEAMS](#)

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