



# SharePoint – The 21<sup>st</sup> Century Process Platform!

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# Today's Speakers



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# How to leverage SharePoint as a Process Platform - Agenda

#1

Love your SharePoint – think process with SharePoint’s maturing capabilities

#2

Pick the right tool for the job -- one solution doesn’t fit all

#3

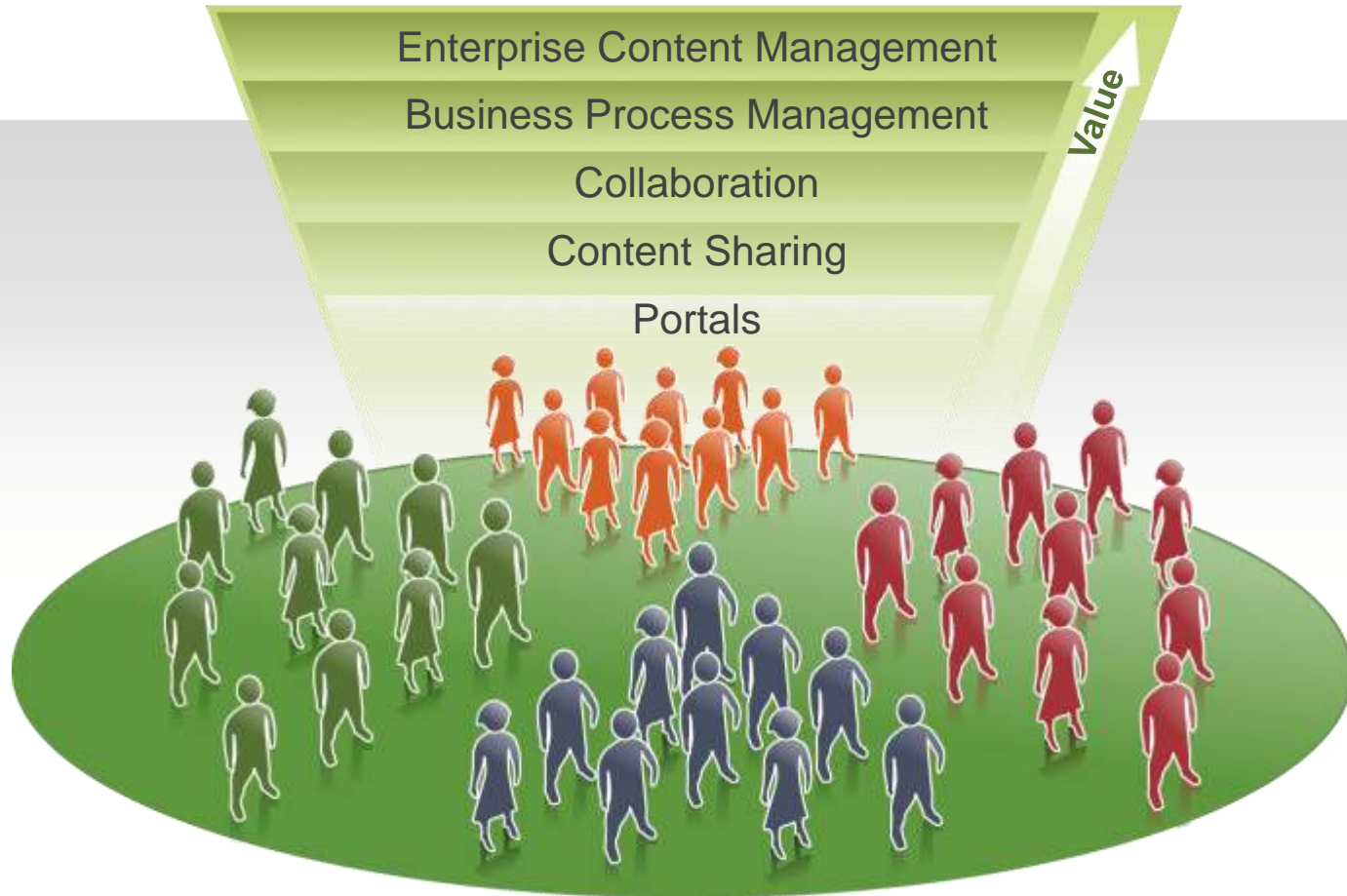
Leverage SharePoint to simplify how work gets done for **all** participants in your process

# Love your SharePoint – A growing user community

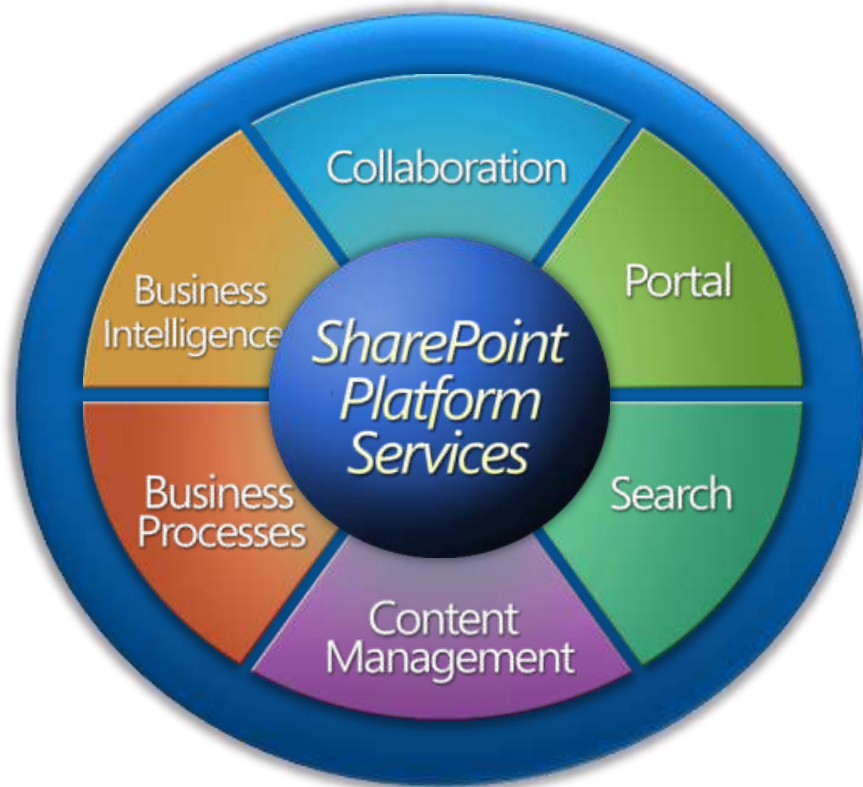
- ✓ 100,000,000+ licenses
- ✓ 17,000+ companies
- ✓ 52% Market share (Forrester)
- ✓ Fastest to Leader's Quadrant (Gartner)
- ✓ 60+% of CIOs see as CORE TECHNOLOGY (IDG)



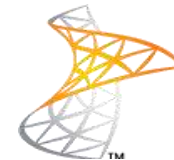
# Love your SharePoint – And leverage its true potential



# Love your SharePoint – The perfect process and document platform



- The content is in it
- The features are there
- Familiar user environment
- Familiar development environment
- Seamless integration with Microsoft components

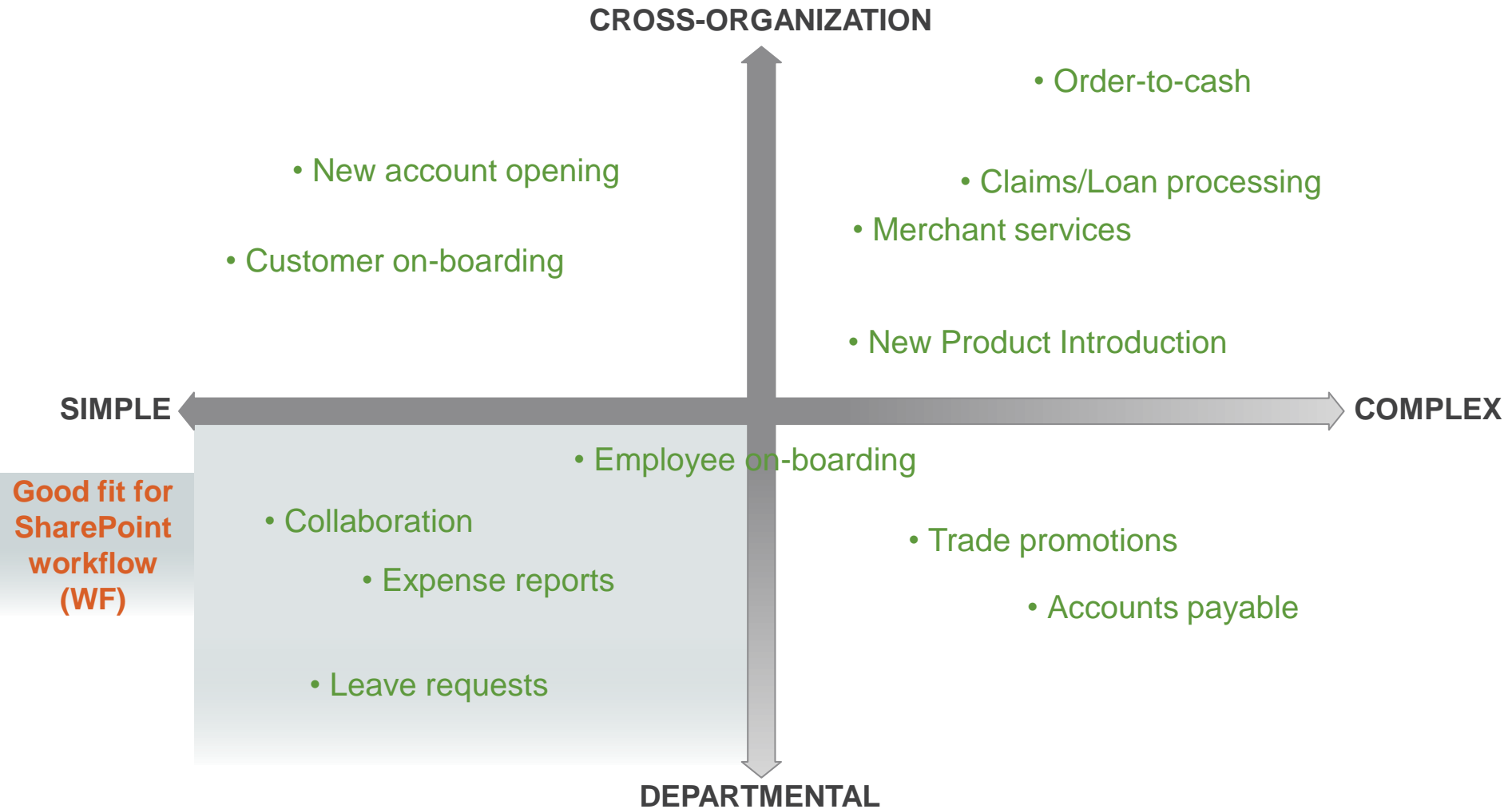


Microsoft®  
SharePoint®

# Size to Fit your Purpose – by understanding your process needs



# Love your SharePoint – The SharePoint process “sweet spot”








# Love your SharePoint – But know its strengths

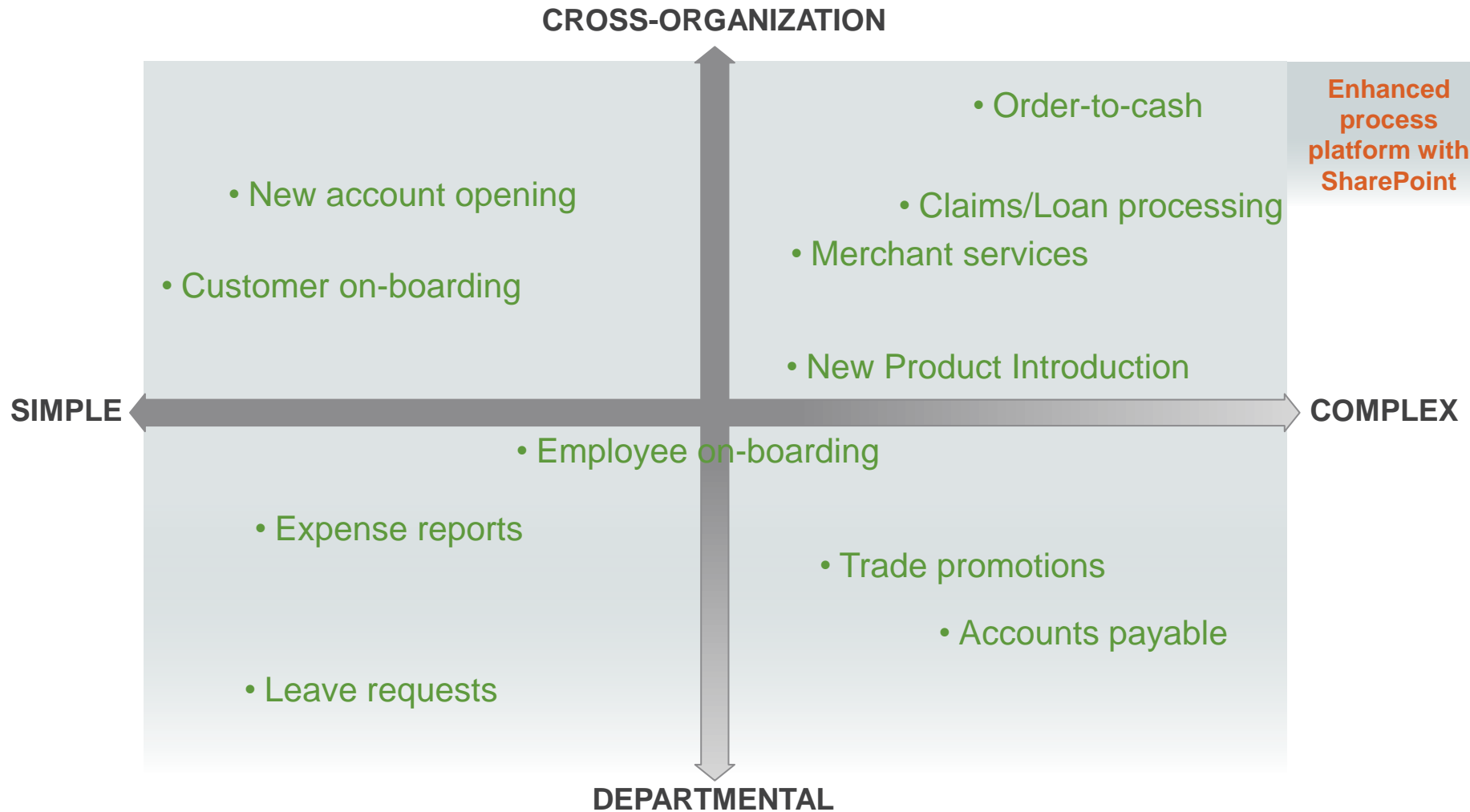
## SharePoint Workflow

- ➔ Quickly “workflow enable” content
- ➔ Improve collaboration with routing and simple rules
- ➔ Employ workflow across an entire site collection
- ➔ Easily implement simple workflow paths
- ➔ Ideal for static and straight-through processes

# Love your SharePoint – And expand its “sweet spot”

SharePoint OOTB Limitations	Process Platform Capabilities
 Static interfaces	Work moves across processes with no loss of context
 Workflow within single site collection	Cross-organization workflows and processes
 Limited workflow variability	Parallel processing
 Simple, single workflow paths	Roll-back, routing back to previous workflow steps or ‘approvers’
 Scalability limitations	Ability to scale platform for highest transaction volumes

# Love your SharePoint – Enhanced process platform “sweet spot”



# Simplify the way you work – By understanding who does work in process



# Simplify the way you work – With a platform built for productivity

## Builder



Tools to easily collaborate with business

Drag and drop visual modeling

Simulation, data capture & manipulation

Scalability

Re-use



## Participant



Easy way to get, see and do work

View of documents in process “context”

Single interface to all systems

Collaboration to get their job done



## Manager



Access to business data to monitor teams, SLA's, & productivity

Process automation that spans departments (internally and externally)



# SharePoint- based process platforms – 7 Key Business Requirements

## How you can simplify the way you work:

- #1 Capture and manage process content in SharePoint
- #2 Fast deployment of end-to-end processes
- #3 Rich, Persona-based user experience
- #4 Single user interface, including legacy data
- #5 Intuitive, process-aware rich user environment
- #6 Real-time process visibility
- #7 Collaborative process improvement

#1

# Capture and manage process content in SharePoint

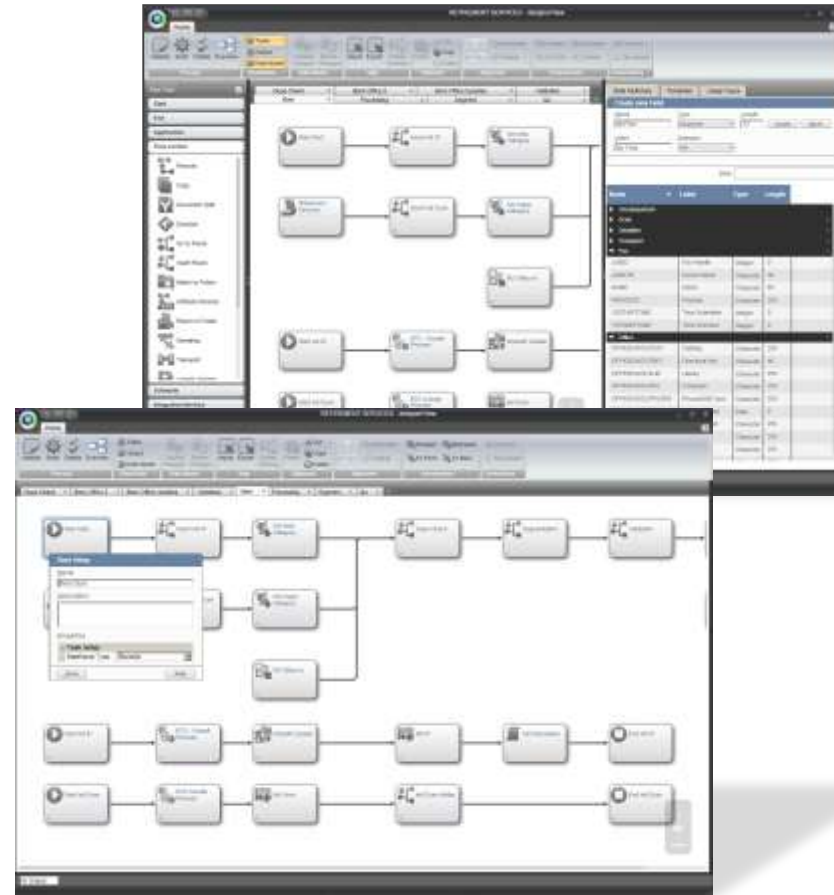
- » Paper and electronic documents
- » Consistently categorize
- » Pre-packaged Search Web parts
- » View and mark-up documents
- » Use SharePoint native admin tools



#2

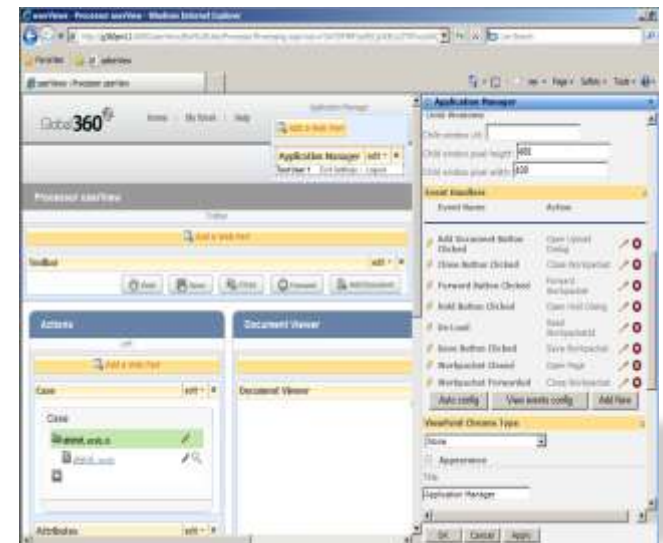
## Fast deployment of end-to-end processes

- » Visual drag-and-drop modeling environment
- » Pre-built tasks for faster development
- » Data modeling integrated within process design environment
- » No code deployment

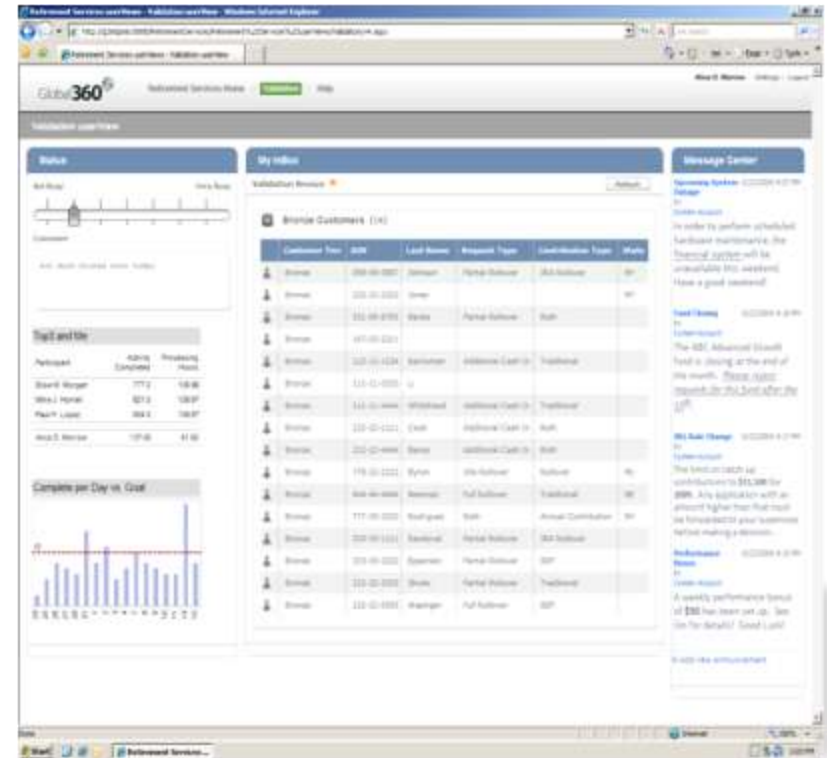


## #3 Rich, Persona-based user experience

- » The right information and tools each user needs
- » Leverage and extend SharePoint's portal and web part platform
- » Enable persona-based user experience out-of-the-box



- » Abstract users from the back-end complexity
- » Access and update data via:
  - SharePoint web parts
  - Business data catalog
  - InfoPath Forms Services
- » Boost productivity, reduce training costs and accelerate time to competency



#5

# Intuitive, process-aware rich user environment

The screenshot displays the Global 360 web application interface for a validation user. The top navigation bar includes the Global 360 logo, links for Retirement Services Home, Validation, and Help, and a user profile for Alice B. Morrow with a Logout option. The main content area is divided into several sections:

- Actions:** A Task List table with columns for Task, Completed By, and Completed On. The table lists three tasks: Review App Type, Review Rules for App Type, and Determine if App is Valid.
- Case List:** A list of cases, including a highlighted 'Missing document type: Application Form' and a 'Workpacket folder'.
- Document Viewer:** A section titled 'IRA Application' with an 'Account Number' field. It contains two main sections:
  - 1. Select an IRA:** A form for selecting an IRA type and contribution type. It includes radio buttons for Traditional, Roth, and SEP, and checkboxes for Rollover, Transfer, and SEP-IRA. It also has fields for Annual Contribution and Tax Year.
  - 2. Provide Your Information:** A section for investor information, including Social Security, Tax ID or EIN Number, and Date of Birth or Date of Trust (MM-DD-YY).

» Integrate all information sources within the context of the user task, including:

- ▶ Structured information in the form of data fields
- ▶ Unstructured information such as emails, faxes or electronic documents

» Right documents are presented to users at the right time

## #6 Real-time process visibility

» Managers and analysts are provided the tools to:

- ▶ Monitor process status
- ▶ Monitor team performance
- ▶ Understand and control work priorities

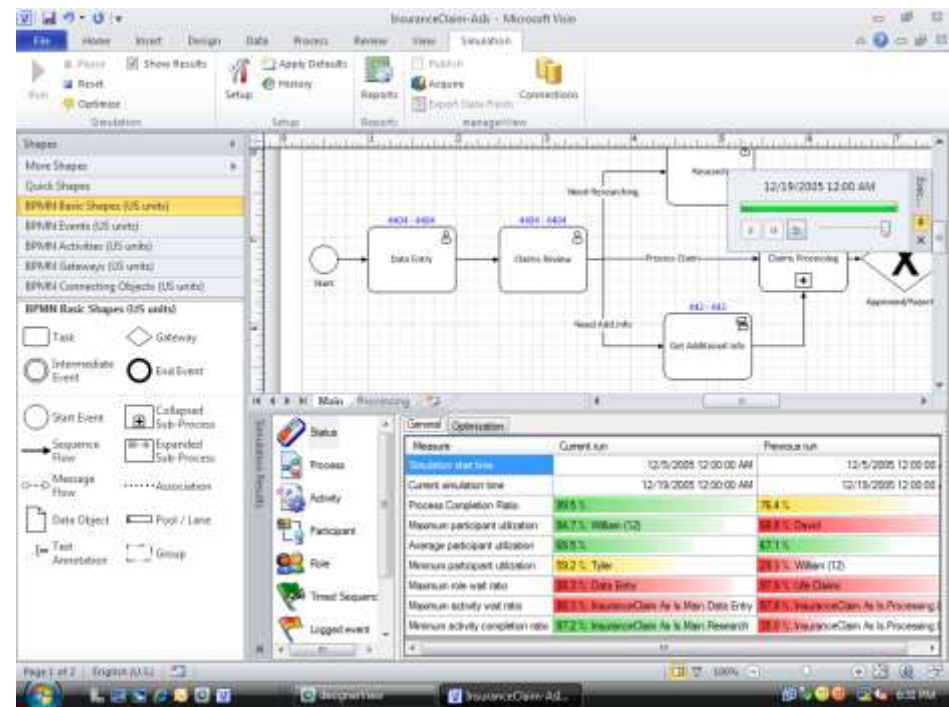
» Use real data to simulate the impact of changing work conditions



» Leverage Microsoft Visio for business analysis and simulation

» Compare simulated and production data

» SharePoint-based collaboration



# How does Global 360 leverage SharePoint?

- Visual Modeler
- Application Manager
- Web Parts with auto-wiring
- InfoPath forms

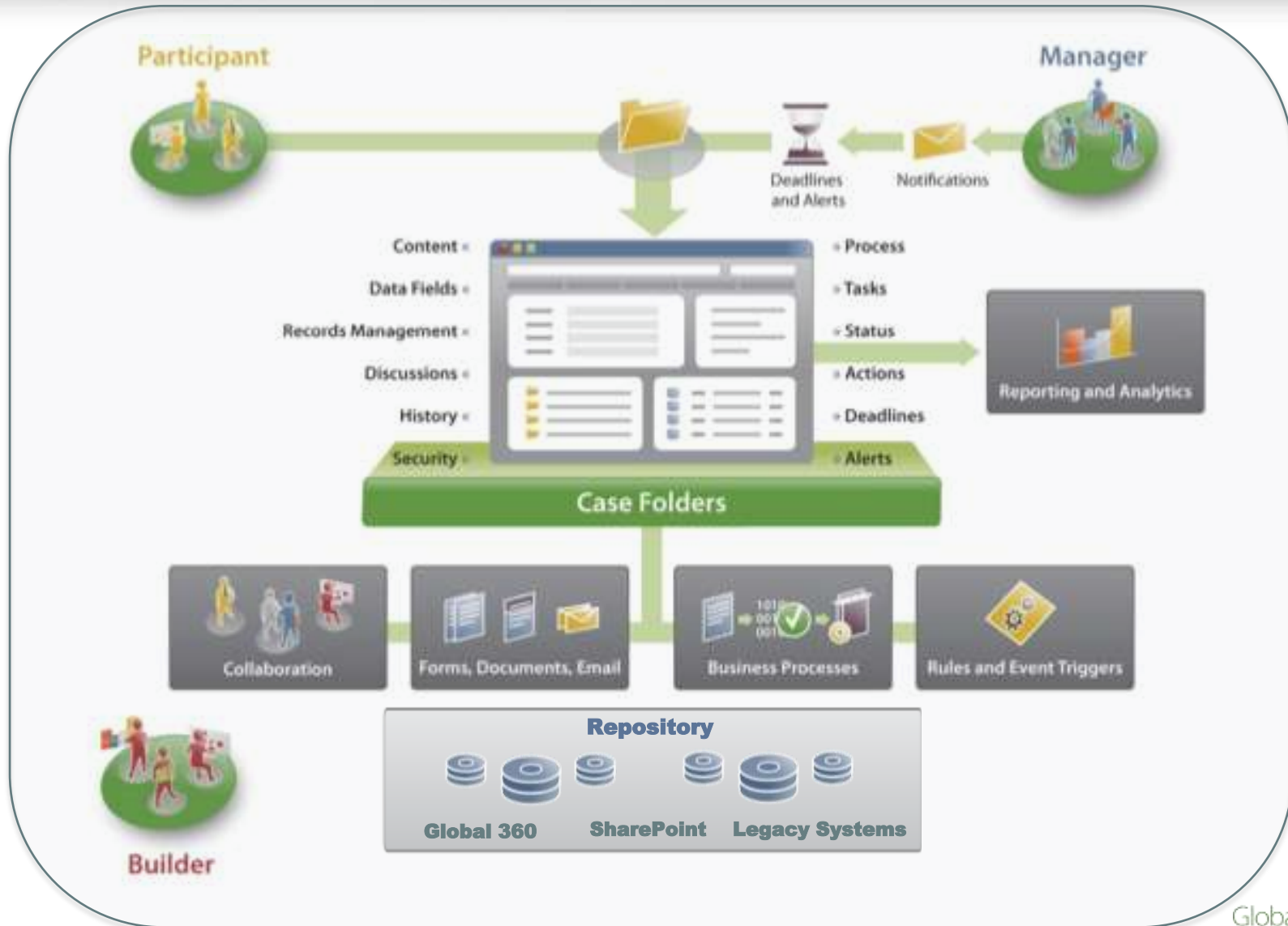
- Process Intelligence
- Business Analytics
- Team Management



- Persona user application
- Process collaboration

- Workforce Management
- Simulation / Collaboration

# Leveraging the best of SharePoint to deliver process management



# Recommendations – Look across your processes (big or small)



## FS/Banking

Account Opening & Servicing (IRA, ISA, etc), Account disputes,

Merchant Services, Mutual Fund Record Keeping

Loan Processing, mortgage processing,

Workforce Management

Compliance, Exception Handling



## Insurance

New Business, Underwriting & Enrollment

Claims Processing, Appeals and Grievances

Customer Service/Exception Handling

Correspondence Management, Policy Change Management

Compliance, Exception Handling



## Government

Finance and Admin (Permits, Taxes, Child Support, etc)

eGovernment eFiling and Inquiries, Citizens Services

eJustice for Courts Casefile Management, Redaction

Law Enforcement, DNA Offender Tracking, Automatic Weapon Lifecycle Tracking

Compliance, Exception Handling, Air Quazality Control, Endangered Species Tracking



## Retail/Manufacturing

Order-to-Cash (Dispute Resolution, etc), Product line management and approval

Procure-to-Pay (Trade Spend capture & Supply Management)

Product line management and approval

Workforce Management

Compliance, Exception Handling, Air Traffic Control Beacon Maintenance

Recommendations ---

Look for areas of savings within your key processes

## Proven process management ROI:

### Reduction of Paper

- » \$20 / document to file
  - » \$120 / misfiled document
- » \$220 / lost document to reproduce
  - » Copy, filing, storage costs

### Improved Productivity

- » Shared document access
- » Single interface to multiple systems
  - » Reduced processing errors

### Increased Revenue

- » Monitor and maintain SLA's
- » Provide new services
  - » Improved customer service and organizational capacity

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# Global 360

## Leader in process and document management



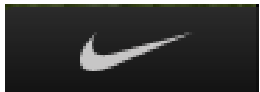
Irish Life



**Microsoft**  
**GOLD CERTIFIED**  
*Partner*



REVLON



# Thank you for your time today



Download the 'SharePoint as a Strategic Weapon Whitepaper

[www.Global360.com/SharePointStrategicWeapon](http://www.Global360.com/SharePointStrategicWeapon)



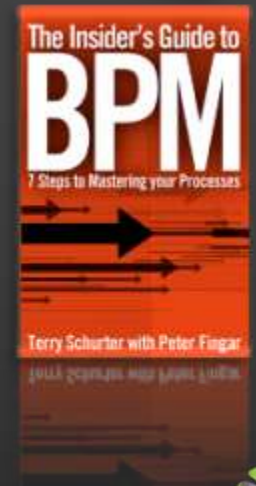
Read: Insider's Guide to BPM: 7 Steps to Process Mastery  
Listen: '7 Steps to Process Mastery' Video

[www.GuidetoBPM.com](http://www.GuidetoBPM.com)



Get More Information: [www.global360.com](http://www.global360.com)

Request a demonstration: [info@global360.com](mailto:info@global360.com)



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