

Case Study: Technology

Getting process documentation right

By taking a turbocharged approach a global software maker gains a streamlined, standardized view of the corporate tasks that make it tick.

Having brought the benefits of cloud-based automation to companies around the world, a global software giant sought similar efficiency and insight for its internal process documentation.

The company's business units struggled with outdated documentation for thousands of vital corporate tasks, everything from travel and expense reports to statements of work and credit memos. Each region's accounting, payroll and HR functions tracked processes in its own way. Documentation ranged from Microsoft™ Word files to spreadsheets to Microsoft™ Visio charts. There was no global view of key data such as time-sheet entries and tax audits.

To gain insight into its operations and costs, the software maker sought a streamlined, digital approach to documenting processes.

At a Glance

Outdated documentation for thousands of corporate tasks was slowing down a global software giant. Cognizant developed streamlined, interactive documentation for more than 1,000 processes in just over a year.

Outcomes

Phase 1 – Duration 6 months

- Approximately 400 standard operating procedures migrated to Nintex Promapp
- 53 new standard operating procedures created in Nintex Promapp

Phase 2 – Duration 11 months

- Approximately 400 standard operating procedures created in Nintex Promapp

Evaluating process documentation and their maturity levels

The client chose Cognizant for our expertise in process documentation and our experience working with other large digital enterprises. In addition, we provided a fast ramp-up.

Our team of content consultants launched the first phase by evaluating the client's process documentation maturity level. The processes we assessed ranged from simple tasks, such as time sheets that can be completed in seven or eight steps, to complex tax and accounting efforts that require months to complete.

Using our customized checklist, our team benchmarked the client's processes against industry standards and our own experience with clients. Among the questions we asked: Did documentation exist? Was it well-organized? Based on the answers, we assigned a maturity score to the process documentation.

We also interviewed 25 client stakeholders. The individual interviews were key to uncovering tribal knowledge—an organization's collective unwritten wisdom. Using questionnaires customized for each business function, we met with individuals to gather the undocumented information for a fuller, more accurate view of the processes.

Creating a new process experience for employees

After gauging the maturity level of every process, we provided detailed guidance on how the client could increase the level of each one for example, how a Level 2 process could be raised to Level 3 or 4. The client gained not only a view of its current documentation but also a solution for how to improve it.

Next, our team created a highly interactive and collaborative process experience for employees by loading the details of each process into Nintex Promapp, a new-generation cloud-based business process management tool selected by the client. Employees using time sheets, for example, click through a series of steps that make it easy to enter the period of activity, project, task performed and number of hours.

Processes are grouped and then displayed by role in Nintex Promapp. For example, new employees will see an introduction to process triggers and procedural steps. Long-time process owners see a dashboard that highlights details such as repeatable processes and revenue opportunities. The display for analysts includes an overview of documents that are underway and those that have been approved.

The turbocharged approach enabled the client to overhaul its informal process culture and develop close to 1,000 standard operating procedures (SOPs) within a short period of time. During the first phase of the engagement, our team created 53 new standard operating processes in Nintex Promapp and migrated approximately 400 processes. The client gained even greater results in phase 2, adding another 400 all-new processes to Nintex Promapp. Phase 3 is now underway.

The client continues to expand its seamless process experience, bringing granularity and structure to hundreds of corporate tasks throughout the organization.

About Cognizant Interactive

Cognizant Interactive's Digital Learning and Content Group has been designing and delivering innovative and engaging strategies and solutions for clients across varied lines of business. Our services meet the new age learning and content demands. We specialize in learning content, technical content, knowledge management, digital content, and learning technology. For more information, visit www.cognizant.com/cognizant-digital-business/interactive-services.

About Cognizant

Cognizant (Nasdaq-100: CTSI) is one of the world's leading professional services companies, transforming clients' business, operating and technology models for the digital era. Our unique industry-based, consultative approach helps clients envision, build and run more innovative and efficient businesses. Headquartered in the U.S., Cognizant is ranked 193 on the Fortune 500 and is consistently listed among the most admired companies in the world. Learn how Cognizant helps clients lead with digital at www.cognizant.com or follow us [@Cognizant](https://twitter.com/Cognizant).

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