Touch Points That Don't Touch Guide for Post-COVID Process & Service Design











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Our Current Challenge

Massive COVID-19 disruptions and rapidly increasing automation are requiring organizations to revise and redefine their operations.



An autonomous tech revolution: "The "human" share of labor hours will decline from 71% to 58% by 2022 while newly emerging tasks will be created"- World Economic Forum *Future of Work*



COVID-19 has exposed weaknesses in organizations that have not been able to quickly evolve and reduced resources for strategic innovation



Companies now find themselves with a scattered set of needs and priorities



Organizations are now forced to move quickly to develop and implement strategy and operational innovation with diminished budgets and resources



Companies are now left vulnerable to poor strategy and inconsistent strategic planning, leaving them in a worse state

This guide provides a practical approach with resources for you to design new services and processes to address these challenges.

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Method + Resources for Process/Service Redesign

This practical guide describes an easy to follow eight-step process to increase safety of your operations while optimizing efficiency. Specific modules from Zylter's *Tech Strategy Tool Kit* are included to support each step of your journey.





Identify Essential Processes + Actions

List and prioritize the specific actions and processes your organization must execute to fulfill your mission and ensure continued success

WHAT IS IT?

Systematic identification and description of the specific processes, tasks, and functions that your organization does to address customer needs and fulfil your mission.

WHY IS THIS IMPORTANT?

Completion of this step will enable you to...

- Identify and understand the processes and actions your organization must do to succeed
- Identify which processes and actions are most essential for organizational success and meeting customer needs
- Understand the needs and constraints that should guide the following redesign steps



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- 1. Compile existing information on organization activities
- 2. Review information to develop a list of important processes and activities
- 3. Collect SME input to ensure the list is includes all essential processes and activities
- 4. Use the compiled list and information to support the following steps

Tech Strategy Tool Kit Method to Apply

Solution Journey Mapping (SJM) is an approach widely used to describe a process from the user perspective

SJM includes identifying and describing each action and its purpose. This information is essential to identify key touchpoints that must be redesigned

The SJM method and example outcome are attached to this guide for your reference and use



	Map Essential Processes + Action Map essential processes and break down complex operations into the specific actions and touchpoints to assess and redesign	S
WHAT IS IT?	Process mapping or journey mapping provide a systematic description of each action or step to complete an essential process. This detailed approach provides the information needed to identify touchpoints to redesign.	
WHY IS THIS IMPORTANT?	 Completion of this step will allow you to Identify the actions that are most essential to a process Understand how process aspects are related Identify key actors and resources required for each action Provide detailed view of processes to guide redesign 	Tech Strategy Tool Kit Method to Apply The Solution Journey Mapping (SJM) method applied in the previous redesign step can be furthe used to create a complete
HOW SHOULD I DO THIS?	 Create a framework to identify process actions and associated information (see SJM framework example) Identify each discrete action required to complete a process Identify the sequence or ordering of tasks in the journey Describe the key needs, considerations and outcomes for each action 	framework to identify and describe all essential processes and actions.
5 ZYLTER		

	Identify Key Touchpoint Interaction Identify the process actions and touchpoints that present the greatest concerns and impact on operations for detailed assessment and redesign	ns
WHAT IS IT?	This analysis identifies the key areas where process execution or service delivery requires close interaction between people and require the most consideration and potential redesign.	
WHY IS THIS IMPORTANT?	 Completion of this step will allow you to What are process aspects or actions that require close interaction to successfully complete? What are the most essential or economically valuable activities within a process? Where should I focus my process and service redesign efforts to maximize safety while ensuring success? 	Tech Strategy Tool Kit Method to Apply The Solution Journey Mapping (SJM) method and framework applied in the previous redesign step can also be used to identify the key touchpoints and the associated process
HOW SHOULD I DO THIS?	 Review the description of process steps, requirements and considerations (from the previous redesign step) Based on this information, identify the specific person-to-person interactions or "touchpoints" needed to execute each action Identify the role or essential value that each touchpoint plays in successful completion of the task or process Use the identified touchpoints to guide consideration of process actions for redesign (pext redesign step) 	actions. The resulting journey map will provide a basis to guide process and touchpoint redesign. Solution Design + Development Solution Journey Mapping Operational Moderate
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Prioritize Processes Touchpoints to Redesign

Assess and prioritize the process aspects for redesign based on the number and importance of associated touchpoints

WHAT IS IT?

This step focuses on determining the most important process actions to focus time and effort on redesigning based on their strategic and operational importance for continued organizational success.

WHY IS THIS IMPORTANT?

Completion of this step will allow you to...

- Understand which processes and actions have the most important touchpoints for organizational success
- Determine the order of process aspects to address
- Determine how to distribute limited time and resources for the greatest strategic and operational impact

HOW SHOULD I DO IT?

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- 1. List all identified processes touchpoints
 - 2. Identify key considerations for assessing the operational importance of touchpoints, such as: essentiality to for service delivery, strategic value, etc.
 - 3. Build prioritization framework
 - 4. Assess each touchpoint for each key consideration
 - 5. Compile assessments to prioritize touchpoints to address

Tech Strategy Tool Kit Method to Apply

The Solution Journey Mapping (SJM) method and framework applied in the previous redesign step aids the process of prioritizing processes touchpoints.

Example of factors for prioritizing touchpoints for redesign can include:

- process type,
- Group(s) required to execute and support processes
- Customer-facing processes
- Level and diversity of effort required for touchpoint execution





Redesign Touchpoints + Processes

Reengineer current touchpoints, actions, and associated processes to ensure safe delivery of key process or service outcomes

WHAT IS IT?

The redesign step includes a rapid brainstorming process to develop potential redesign concepts for each touchpoint for further assessment selection prototyping and testing.

WHY IS THIS IMPORTANT?

Completion of this step will allow you to...

Identify potential alternatives for redesign of touchpoints

- Compare and assess alternatives based on their feasibility, ability to provide desired outcomes and other key factors
- Select the best touchpoint redesign concept for further consideration, testing and adoption

HOW SHOULD I DO IT?

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- 1. Identify the desired outcomes and constraints (based on developed journey map) for touchpoint design
- 2. Leverage process actors, subject matter experts and representative users to ideate potential redesign solutions
- 3. Identify criteria or considerations for assessing concepts (viability, impact on user experience, likely cost, etc.)
- 4. Have SMEs, users and others assess each concept
- 5. Compile assessments to select the most promising touchpoint redesign concepts for testing and adoption

Tech Strategy Tool Kit Methods to Apply

Sociotechnical Systems Model (STS) is an approach for quick assessment of the interconnectivity of processes enabling effective process redesign



Operations Process Mapping (OPM) creates a flowchart that depicts a sequence and nature of activities and processes.





Assess the Sociotechnical System Impacts

Determine the immediate and long-term impacts of touchpoint redesign for each aspect of your sociotechnical system

WHAT IS IT?

Completion of this redesign step will enable the organization to identify the wider impacts of touchpoint redesign for the entire sociotechnical system (STS), to include users, technology and operating environment.

HOW CAN I USE IT?

- Completion of this step will allow you to...
- Identify the impacts of touchpoint redesign for each STS aspect
 - Identify changes to the STS required to fully support the new touchpoint design (e.g. new technology or training)
 - Identify likely long-term implications of touchpoint design

HOW DO I APPLY IT?

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- 1. Start with a clear description of the redesign concept considered (from the previous redesign step)
- 2. Describe current as-is STS (prior to redesign) for the process
- 3. Identify immediate changes or new capabilities required by STS aspect to support touchpoint redesign
- 4. Identify long-term implications for the STS (e.g., new skills or competencies required by the workforce)

Tech Strategy Tool Kit Methods to Apply

The STS approach is used to help identify the most significant implications of a redesigned process



Process Modeling + Simulation (PMS) provides a method for quantitative assessment of processes and the expected impact of redesign changes.





Identify New Technology / Capabilities Needed

Identify where and how new technology can support touchpoint redesign or mitigate the adverse impacts of process redesign

WHAT IS IT? Completion of this redesign step includes applying the STS construct to identify considerations for and impacts of new technology solutions to execute or support the redesigned touchpoint

WHY IS THIS IMPORTANT?

Completion of this step will allow you to...

- Identify where technology can potentially support and improve adoption of new touchpoint designs
 - Identify considerations for assessment of potential tech solutions for touchpoint execution
 - Assess likely positive and adverse impacts of tech adoption for the touchpoint and wider process

HOW SHOULD I DO IT?

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- 1. Identify the touchpoints where tech solutions are most likely to provide a positive impact
 - 2. Identify potential tech solutions for each touchpoint
 - 3. Assess maturity and viability of identified tech solutions
 - 4. Assess expected impact of the technology on the touchpoint and its desired outcomes

Tech Strategy Tool Kit Method to Apply

The STS Model used in the previous redesign step can be further applied to assess the implications of a new tech solution on the entire work ecosystem including the operating environment, task/ processes, users/ workforce and organizational design.





Create a Change Action Plan

Identify the time-based actions required to successfully implement the touchpoint redesign and adopt supporting technology solutions required

WHAT IS IT? Completion of this redesign step provides an implementation roadmap to systematically identify the key actions required for coordinated touchpoint and process redesign

WHY IS THIS IMPORTANT?

Completion of this step will allow you to...

- Identify key actions required to implement each touchpoint redesign
- Identify functional dependencies between implementation actions
- Established a time- and conditions-based plan for executing process design and enabling initiatives

HOW SHOULD I DO IT?

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- 1. For each touchpoint, identify the specific actions required to fully implement the redesign concept
- 2. Estimate the time required
- 3. Identified dependencies with other actions
- 4. Align implementation actions based on dependencies to establish an overall plan
- 5. Check for potential efficiencies or conflicts between touchpoint redesign initiatives (e.g. shared resources)

Tech Strategy Tool Kit Method to Apply

Implementation Roadmap Development (IRD) is an approach used to identify and sequence actions required to implement the touchpoint redesign.

The framework for this approach communicates actions, timelines, and dependencies efficiently. This approach is perfect for communicating action plans that will evolve with subsequent information.



Next Steps to Get Started

Want to learn more about our transformative resources and strategies to address operational demands and strategic opportunities? Take our free 1minute tech strategy audit.

To access our free 1-minute strategy audit or get help applying any of these resources, contact us at: <u>TSTK.support@zylter.com</u>

Learn more about our work and how we've supported industry leaders since 2016 www.zylter.com/sts-toolbox



Appendix A

TECH STRATEGY TOOL KIT MODULES TO ENABLE YOUR TOUCHPOINT DESIGN

The following Tool Kit modules are included here to address your needs:



Service Journey Mapping



Sociotechnical System Model



Operations Process Mapping



Process Modeling + Simulation

IRDE IRDE Indementation Roodinae Development Implementation Roadmap Development





Solution Journey Mapping

Identify the specific tasks and touchpoints for service design and the capabilities required to enable it

WHAT IS IT?

Solution Journey Mapping provides a systematic method to identify the actions required for a service, its specific touchpoints and capabilities to support it.

HOW CAN I USE IT?

Completion of this approach will enable you to answer...

- What are the specific actions required for a customer to interact with a service or product?
 - □ What are key requirements and touchpoints for associated with each action?
 - What are the capabilities required to deliver and support each action or touchpoint?

HOW DO I APPLY IT?

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- 1. Create a framework to organize journey mapping information
- 2. Identify the key phases of the interaction journey
- 3. Identify each of the specific actions required to provide a complete product or service experience
- 4. Identify key touchpoints, opportunities and challenges associated with each action
- 5. Identify the capabilities required to support each action

HELPFUL HINTS

This framework is especially useful when trying to outline and refine a solution.- Pulling together research or prior work that has led to a decision on a solution

See STS- Sociotechnical System Approach to understand the systematic nature of all problems to create better solutions



Solution Journey Mapping

The Solution Journey Mapping example below is an example of a detailed framework for the systematic description of the journey and the information to identify the requirements associated with each key action and touchpoint.



RELATED STS > STS | Sociotechnical Systems Approach **APPROACHES** Solution Journey Mappin



Sociotechnical Systems Approach

Quickly assess organizational impacts of new technology

WHAT IS IT? The STS provides a simple construct to identify considerations for and impacts of new technology based on the operations, capabilities and operating environments

HOW CAN I USE IT? Completion of this approach will enable you to answer...

- What are the organizational factors I must consider and mange during new technology adoption?
 - How do these factors impact adoption of new technology?
 - What are likely impacts for my organization and workforce from bringing in new technology?

HOW DO I APPLY IT?

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- 1. Define the organizational level or unit for consideration, such as department, team or role
 - 2. Describe each STS aspect for the unit examined
 - Current and/or new technologies
 - Essential tasks/processes completed by the STS
 - Workforce characteristics
 - Operating environment (office, warehouse, etc.)
 - 3. Identify potential technologies for inclusion in the STS
 - 4. Assess impacts of new tech for each STS aspect

HELPFUL HINTS

This is the core concept for Zylter's approach to emerging tech adoption. Each Toolbox approach addresses one or more STS aspects

Use this framework when starting to consider potential technologies for adoption

Use this framework to identify more detailed assessments and analysis required to guide tech selection and successful adoption



Sociotechnical Systems Model

Zylter's STS Model depicts the interdependent capabilities that make up a work unit or operational capability. The STS Model includes operational methods, the people who use and interact with the system and the technology that supports it. This model is intended as a conceptual guide for more detailed consideration and analysis with the more detailed methods described in the STS Toolbox.



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RELATED STSSTS Use Case Description (UCD)**APPROACHES**Tech Adoption Indicators Identification (TDI)

Process Design + Improvement Tier 3 Tier 3 Tier 3 Operations Process Mapping Operational High	Operational Process Mapping A Develop a practical flowchart to accurately depict each of the sequence of activities and tasks within a wider process or service	pproach				
WHAT IS IT?	This module describes processes and auctions based on	HELPFUL HINTS				
	enable process modeling and improvement.	organization's current processes focus groups can				
HOW CAN I	Completion of this approach will enable you to answer	comprehensive information				
USE IT?	What are the key actions and activities in my process or service?	levels see SFG– Structured Focus Group				
	What is the factors that influence execution of each process task?	To simulate the efficiencies of the process model use PMS– Process Modeling +				
	What identifies actions or activities have the greatest impact on the process outcomes?	Simulation to apply a mathematical model that simulates the current efficiency level of the				
	Where should I focus my process improvement efforts?	assignment process				
HOW DO I	1. Identify the scope of the process(es) to map					
APPLY IT?	2. Identify the internal and external groups that execute or influence process execution					
	 Conduct structure focus groups to collect information on the tasks executed and the key factors that indicate how they are executed 					
18 7VI TED	4. Compile information and develop a flow chart of current processes for stakeholder review and refinement					



Operational Process Mapping Approach

An Operational Process Mapping (OPM) Approach will enable definition, description, and assessment of each stage of complex process. The map should be developed based on existing documentation and structured focus groups with key process actors. The use of standard symbols and 'swim lanes' communicates the process flow and enables identification of areas to apply new technology to improve efficiency and outcomes.



Process Design + Improvement **Process Modeling + Simulation** A description of current and potential process actions and their outcomes using numeric data or Process Modeling + Simulation quantitative approximations Operational WHAT IS IT? This module guides you to develop a guantitative model of **HELPFUL HINTS** a complex process to measure process performance and Use our Operational Process Mapping (OPM) module to assess the impact of process improvements compile information to to guide quantitative modeling. This information can come HOW CAN I Completion of this approach will enable you to answer... from a range of sources, such as: **USE IT?** □ How efficient are my workforce processes? > FRP data Pre-formed reports □ What are the key metrics of my process and key actions? Post-processed reports Custom data pulls from What process aspects or actions should I focus on to an ERP > Interviews and surveys increase efficiency and quality of outcomes? from Subject Matter Experts (SMEs) HOW DO I 1. Apply a detailed and verified process map (see the **Operational Process Mapping module**) **APPLY IT?** 2. Identify the key process metrics and parameters to model 3. Quantitatively model each action in the process 4. Connect action-level modeling into an overall process model with specialized software (E.g. MATLAB) 5. Conduct "model runs" to validate the model accuracy and assess impact of parameter changes on outcomes

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Process Modeling + Simulation

Below is an example of a process modeling + simulation with an event-based mathematical model of a complex process based key assumptions and conditions. The mathematical model simulates the current efficiency level of a process. The model provides an accurate representation of process performance based on key metrics. This type of model is used to identify process aspects to focus redesign and improvement efforts on.



APPROACHES > OPM | Operational Process Mapping



Process Design + The PROVIDENT PROCESS DESIGN + Simulation Process Modeling + Simulation

Quantitative modeling of action

Strategic Planning

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Implementation Roadmap Development

Identify and sequence the time-based actions for successful implementation of tech-based solutions

WHAT IS IT? Implementation Roadmap Development is a method to systematically identify the key actions required for a tech adoption project with the expected timeline of execution Completion of this approach will enable you to answer... HOW CAN I **USE IT?** What are the key actions required to execute the implementation project? What is a realistic timeline to complete the project and each discrete task? What are the key dependencies among project actions and across tech implementation projects? HOW DO I 1. Identify each discrete tech implementation project and its measurable end state **APPLY IT?** 2. Identify the key actions or tasks required to reach the project end state 3. Estimate the amount of time required to complete each action 4. Include the time required for execution of each task on a GANT-style chart based on the expected start date,

duration and ending date

5. During project execution update the progress each key action to reflect completion status

HELPFUL HINTS

Outline any constraints that are on this project before starting.

Example constraints can include whether the project already has an end date, the project has a set amount of hours that it can use, or phase(s) will be done by a third party

The end of each phase is an organic milestone and opportunity to recap to key stakeholders' progress made on the project



Implementation Roadmap Framework

Apply framework to communicate actions, timelines, and dependencies

Our Implementation Roadmap Development Framework provides a method to identify key actions required to implementation a new tech-based solution. The framework breaks projects down into the sequential actions required with a summary description of each key action, expected timeline and duration based on a standard unit of time (e.g., quarter).



RELATED STS > ABM | Activity Based Management **APPROACHES** > ABC | Activity Based Costing

> KPI | Activity KPIs

Apply our module catalog to address your growing needs The Tool Kit has 70+ modules for all your tech strategy needs

	GROUP 0 CORE GROUP 1 STRATEGIC FRAMEWORKS PLANNING		GROUP 2 SOLUTION DESIGN + DEVELOPMENT			GROUP 3 SOLUTION LIFECYCLE PLANNING			GROUP 4 MARKET ANALYSIS + PRICING			GROUP 5 USER + WORKFORCE ANALYSIS			GROUP 6 PROCESS DESIGN + IMPROVEMENT				
TIER 1 Summary Approaches	STS TAR TBR	###	###	###	SRL Mining Sections ford	TUI	SOP types types to the	###	###	###	###	###	###	###	###	###	SRL	###	###
TIER 2 General Assessment		SEM	SR	ROI	UCD	OEA	PRD	ASA	FLD		MPD	CNF		UPD User Profile Development	USA	SDD tentes failure for the	TSD Tool Booters Profes	OKR Openensel for texts	### x
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					SCC	SES	SCS												###
TIER 3 Detailed Assessment		CLA	SRD SRD Mange Restary Project	IRD Internet States	SJM Martine	SRI	PCD	TCO	TCM Tree Care of Councilies Minimum	MRA	MEC			Contraction of the second seco	TAI	FTA	PRL	ABM	OPM
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TIER 4 Technical Analysis		OBA	SOM	IAP	CFA	PCP	TPD				SNA	PPD	CRM	WDR	ΠΑ	WAM	PMS	PDR	
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		PRICING	LEVEL OF SUPPORT	DESCRIPTION								
RS	TIER 1: SUMMARY APPROACHES	FREE	Published Resources	High-level approaches and resources that include multiple higher-tier methods. These ar essential resources that we provide for free to guide user planning and assessment of needs.								
LE TIE	TIER 2: GENERAL APPROACHES	\$6,200	20 Hours of Expert Advise	Methods and resources that can be executed with mostly descriptive information and quickly applied to inform key decisions. These modules are scaled for immediate application with minimal support at an economical price.								
MODUI	TIER 3: DETAILED ASSESSMENT	\$16,200	60 hours of Expert Advise + Analytic Support	These modules guide application of extensive numeric and/or descriptive information for a more detailed examination and assessment. These modules come with a moderate level of support to guide and support user analysis.								
	TIER 4: TECHNICAL ANALYSIS	Based on Needs	Expert-Led Analysis + Tailored Support	These modules include methodologies that apply extensive numeric and descriptive data to answer complex strategic questions. These modules require a high level of expertise to execute. We provide a high level of dedicated support with specialized software and resources to execute.								

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METHOD BLOCK DESIGN

Each Tool Kit method is represented by a block in the Table of Methods below. Each block includes essential information about the task set as described here.



Thank you for accessing and sharing our resources!

We are passionate about the art and strategy of emerging tech adoption. Zylter thrives at the intersection of tech analysis, design and strategy. We appreciate any feedback you have to improve these methods and how we support them!

For more information or help applying this and other STS Toolbox resources, contact us at: <u>STS.solutions@zylter.com</u>

To explore the STS Toolbox further or access other methods and resources visit <u>www.zylter.com/sts-toolbox</u>

To learn more about our work with tech innovators and industry leaders at <u>www.zylter.com</u>



We have the expertise to make your future a reality !

Contact our solutions team at: <u>TSTK.support@zylter.com</u>

