

ULTIMATE GUIDE: DIGITIZING BUSINESS PROCESSES



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CHAPTRE 1: WHY STRUCTURE YOUR PROCESSES?

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BUSINESS PROCESSES: FROM COMPLEXITY TO CLARITY

Dunning that piles up, validations that drag on, costly data entry errors: these malfunctions are not inevitable. In most cases, they are the symptom of a deeper problem: an organization based on informal, dispersed or technologically obsolete processes.

Yet, as customer demands increase, regulations and standards tighten, and teams are called upon to “do better with less”, operational efficiency is becoming a strategic priority for every company. And to achieve this, business processes need to be re-engineered and automated. All that remains to be done is to find an overall method that combines productivity gains, reduced costs and ease of implementation...

In three words, the solution we're looking for is the “process approach”, which is becoming increasingly popular in companies. And rightly so, as it offers a host of benefits: shorter processing times, quicker access to information, traceability of operations, improved overall operating efficiency, etc.

And, contrary to popular belief, automating processes doesn't mean deploying yet another technological gas factory. First and foremost, it's about providing clarity: who does what, when, with which rules, and which tools? Then it's about making your processes more reliable, saving you time at every level, and restoring clarity to those who act on a day-to-day basis. In short: making your business run more smoothly.

This white paper is aimed at executives and managers who want to take action, offering them a structured approach, backed up by a wealth of field experience, to successfully implement an automation process tailored to their specific situation. With one idea in mind: automation is only worthwhile if it is useful, adopted and scalable.



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CHAPTRE 1: WHY STRUCTURE YOUR PROCESSES?

An organization that doesn't control its processes... suffers them. An organization that structures its processes regains control. But before automating, you need to know what you want to do, why and how. That's what the process approach is all about!

- **Stay competitive by improving your processes**
- **Symptoms of a poorly equipped organization**
- **Expected benefits: efficiency, traceability, agility**

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STAY COMPETITIVE BY IMPROVING YOUR PROCESSES

Faster decision-making cycles, increased customer demands, pressure on human resources, regulatory compliance requirements: companies, and especially SMEs, face a constantly changing environment.

In this context, operational functioning can no longer be based on informal habits or ad hoc solutions. To remain competitive, an organization must be able to react quickly, anticipate bottlenecks, and mobilize its resources consistently. This presupposes a clear vision of its business processes.

Whatever your activity, your business is punctuated by processes: handling a customer complaint, delivering a product, introducing a new product range, paying employees, processing vacations, etc. All these processes are clearly key factors in your success. All these processes are clearly key success factors. And it's in your interest to optimize them.

Adopting a process approach does just that. It brings structure where empirical practices sometimes prevail. It formalizes what was previously tacit. It aligns your employees' operational actions with your strategic objectives. In this sense, it is a direct response to the need for resilience and agility that companies today must integrate into their day-to-day operations.



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SYMPTOMS OF AN ILL-EQUIPPED ORGANIZATION

The need to structure processes is anything but theoretical. It is generally imposed by very concrete signals: processing times that are too long, loss of information along the way, constant reminders, misunderstandings between departments, manual re-entries, avoidable errors, overload of work for managers.

Here are two examples that illustrate the negative impact of poorly managed processes:

• Customer complaints

In the case of a complaint, inadequate handling, delays, poor resolution or different approaches from different employees handling the request are all bad points that can lead to the loss of a customer. What's more, if customers are unhappy, the company's image suffers, with a consequent impact on the acquisition of new customers.

• Managing regulatory changes

When a new regulation requires the modification or replacement of a part within a product or piece of equipment, the challenge is not limited to a simple technical adjustment. The entire industrial process has to be rethought: compliance, coordination with suppliers, updating of technical documentation, management of existing stocks, training of field teams, and even requalification of products during production or in service. A rigorous process approach makes it possible to anticipate these impacts, guarantee the traceability of decisions and ensure smooth, consistent implementation throughout the company. In the absence of such an approach, the risks are numerous: delays to market launch, non-compliance, additional logistics costs and loss of competitiveness.

These dysfunctions are not necessarily the result of a lack of commitment on the part of your teams. They are often the result of an organization that works “the old-fashioned way”, without structured support, or with unsuitable tools: Excel files, e-mails, paper forms, and other heterogeneous business tools that “don't talk to each other”.

This situation generates considerable hidden costs: lost productivity, customer dissatisfaction, cognitive overload, undetected errors, internal tensions. On the scale of an SME or a department within a large group, this situation needs to be remedied... with the process approach!

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EXPECTED BENEFITS: EFFICIENCY, TRACEABILITY, AGILITY

Adopting a process approach means first and foremost regaining control over the way your organization operates. By mapping key processes and clearly defining roles and stages, you can simplify execution. It eliminates wasted time.

The impact is quickly visible: employees know what they have to do, managers monitor progress in real time, and customers receive faster, more consistent responses. Time spent searching for information or following up on a file is drastically reduced. What's more, traceability quickly becomes an asset, rather than a constraint. Every step is documented, every decision recorded, facilitating audits, compliance with standards and performance analysis.

Finally, an organization based on clear processes is more agile. It can rapidly evolve its operating modes in the event of sudden regulatory change, product or service launch, crisis or opportunity. Adaptation no longer relies on individual tinkering, but on a collective ability to evolve internal circuits. And, with the right tool, this can be done quickly: in just a few days!

As part of the dematerialization of its purchasing process with Iterop, the purchasing department of a major French metropolis succeeded in setting up its process in less than a week, with the first requests taken into account as early as the fifth day!



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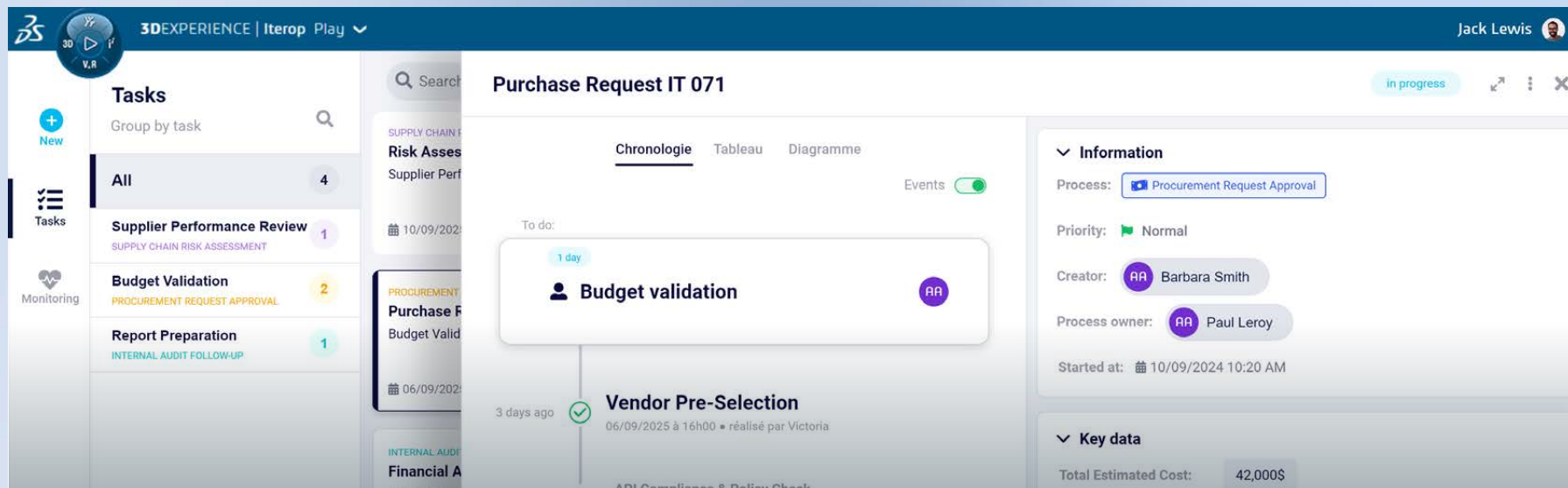
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THE 3 MAIN BENEFITS OF PROCESS FORMALIZATION

ORGANIZATION

- Provides a global vision of the organization
- Gives employees greater visibility of their role within the process
- Increases stakeholder satisfaction
- Saves time at all levels
- Secures workflow

COMMUNICATION

- Streamlines exchanges within the company
- Formalizes operations
- Enables cross-functional communication between different levels of the company
- Promotes collaboration between teams
- Limits errors

MONITORING & STEERING

- Enables the implementation of performance indicators
- Centralizes information
- Measures the achievement of objectives and highlights malfunctions
- Improves decision-making responsiveness

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CHAPTRE 2: HOW CAN YOU IDENTIFY THE PROCESSES YOU NEED TO AUTOMATE FIRST?

Automating everything, everywhere, without method or hierarchy, leads to costly failures. To be successful, you need to make targeted choices: you need to identify the most strategic processes, or the most painful ones, those that are really holding back performance. But you need to know what you're talking about, and how to spot these “pebbles in the shoe”.

- The first step is to differentiate between process, procedure and activity
- Criteria for selecting a “good candidate” for automation
- The role of employees in identifying irritants

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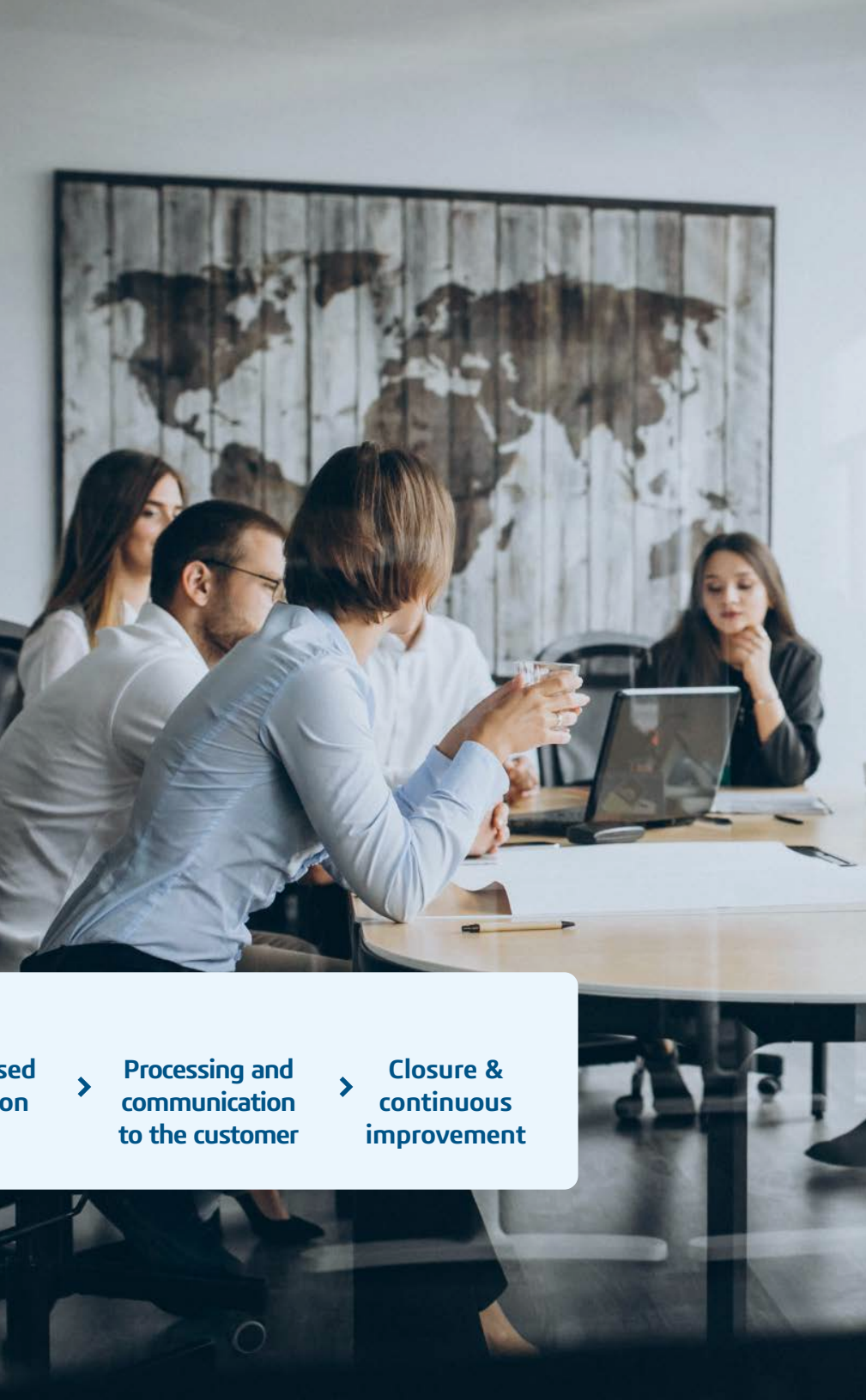
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FIRST, WE NEED TO DIFFERENTIATE BETWEEN PROCESS, PROCEDURE AND ACTIVITY.

Many people still confuse the notions of process, procedure and activity, which is detrimental to a clear diagnosis. So let's start with a quick reminder:

- A “**process**” is a “chain of action or value chain” that transforms a request or key information into a concrete result, useful to a customer, whether internal or external. A process often crosses several departments, mobilizes different tools, and includes validation or decision-making stages.
- A “**procedure**” is a formal description of how a task is to be carried out, often with a view to compliance.
- An “**activity**” is a unit of action or step, such as “filling in a form” or “validating an order”.

Automation targets processes first and foremost, because they are where friction, redundancy, delays and, above all... potential productivity gains are concentrated!



Customer complaint management process



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CRITERIA FOR SELECTING A “GOOD CANDIDATE” FOR AUTOMATION

Not all processes deserve to be automated. The best candidates often have three main characteristics:

- **Repetitive:** the process to be automated is often repeated, follows similar steps, and represents a significant operational burden.
- **Critical:** the process has a direct impact on customer satisfaction, regulatory compliance, or the profitability of your business.
- **Identifiable irritants:** the process generates internal frustration (lost time, re-entering data, loss of information) and a clear demand for improvement.

The challenge is therefore to balance the strategic impact of the process with the human cost of managing it manually. This comparison quickly highlights the priorities.

Here are three typical examples of processes that offer significant added value when automated:



Complaint management: this always involves several departments within the company (customer relations, logistics, accounting) and requires perfect traceability. If poorly managed, this process can quickly damage your brand image.



Employee onboarding: often spread across HR, IT, and managers, the integration of new employees suffers from workload imbalances and oversights. Automating this process improves the employee experience and productivity.



Supplier tenders: a complex, sequential, and documented process that is often a source of wasted time and tracking errors if poorly managed.

An agri-food company automated its onboarding process with Iterop, involving all relevant departments. The result: a smooth process, employees up and running from day one, and reduced administrative workload for HR teams, all without double data entry or manual follow-ups!

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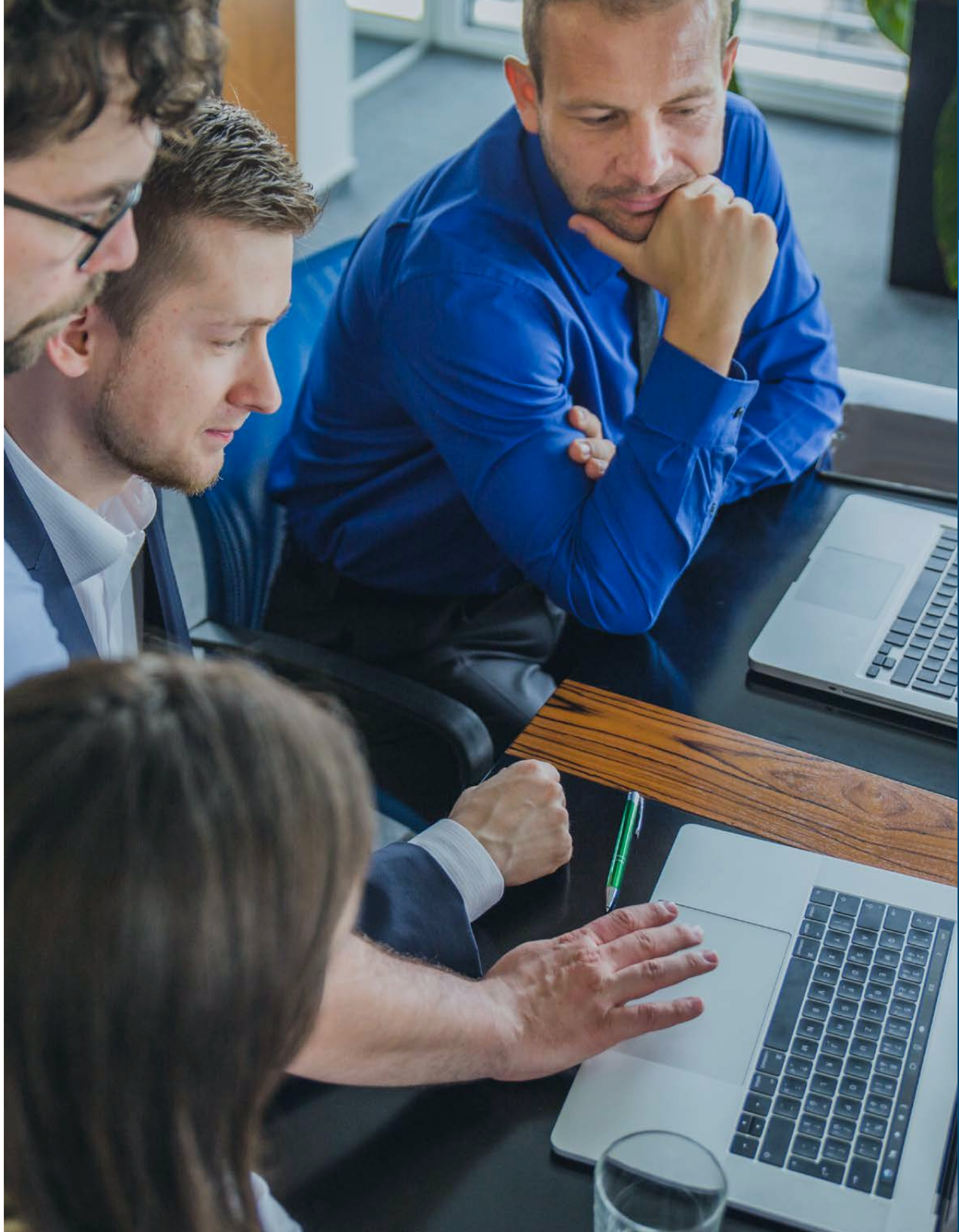
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THE ROLE OF EMPLOYEES IN IDENTIFYING IRRITANTS

The people involved in the process are best placed to help you define exactly how an activity is carried out, as these are the actions they perform every day. The real sticking points are not necessarily found in organizational charts or dashboards. They are experienced on the ground. It is your employees who, on a daily basis, have to compensate for the system's flaws with reminders, homemade spreadsheets, or unshared tips.

Involving them from the outset in identifying problematic processes allows you to pick up on these “invisible” irritants, save time in formalization, and above all, create natural buy-in for the future tool. Automation always starts with active listening.



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CHAPTRE 3: THE 4 STEPS TO A SUCCESSFUL BPM PROJECT

A well-executed BPM (Business Process Management) project profoundly transforms an organization, and its success depends on structured, gradual, and rigorously managed implementation. Indeed, as part of a process-based approach, your company cannot simply describe processes in internal guides or manuals. All too often, these documents are never read or applied. The goal is to describe the processes and ensure that they are properly implemented!

1. Analyze the current situation and map out processes
2. Set a clear goal and measurable performance indicators
3. Establish the right framework from the outset
4. Test, adjust, and evolve

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1.

ANALYSIS OF EXISTING PROCESSES AND PROCESS MAPPING

Before seeking to optimize or automate, it is important to understand how things work today. This phase of analyzing the existing situation is essential. It consists of identifying the business processes that are actually used.

We usually start with a series of workshops with operational staff: those who “do” the work on a daily basis know very well where the slowdowns, redundancies, or inconsistencies are. The goal is to model processes as they are experienced, identifying the steps, the people involved, the tools used, the points of friction, and the key decisions.

This first step makes it possible to map out the company's processes, which will be very useful in the long term. It can be done using BPMN (Business Process Model and Notation) diagrams or a simplified version that's more accessible for SMEs, depending on your preferences and needs. The important thing here isn't to produce exhaustive documentation, but to reveal critical sequences and processes with high potential for optimization.



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IT'S IMPORTANT TO DEFINE:

A GOAL

First and foremost, to implement any process, you must define its objective. In fact, this simply means defining its purpose, what it enables you to do operationally. To help you, you can think about what you are going to call it: order management, customer complaints, tender management, etc.

THE TRIGGER

One recommended method for starting to model processes is to identify the main triggers for the process: customer orders, complaints, vacation requests, purchase requests, etc. This allows you to identify not only the starting point of the process, but also its purpose.

THE STEPS

This is an important phase in which you will need the help of your employees who are directly involved in the process. It involves defining the process step by step: what action takes place at what point? What information is needed? Please note: the aim is not to set up an overly complex process, so keep the number of steps to a minimum at first.

THE INDICATORS

When defining your processes, you must define KPIs or Key Performance Indicators. These indicators are used to assess the performance and efficiency of the process. The indicator is calculated from process data and is associated with a target to be achieved, such as reducing the processing time for a customer complaint by 30%. Monitoring performance indicators is central to implementing a continuous improvement process.

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SET A CLEAR GOAL AND MEASURABLE PERFORMANCE INDICATORS

Too many process initiatives fail because they lack a clearly defined objective from the outset. “Improving productivity” or “streamlining workflows” are not operational objectives. You need to aim for a concrete, measurable result, such as:

- Reducing the time taken to process a customer file by 30%.
- Eliminating double data entry between two business tools.
- Improve compliance with a regulated process.
- Reduce the number of errors or omissions by 50%.

Once the objective has been set, you need to define the associated key performance indicators (KPIs), which will enable you to manage the project and prove its value once it has been rolled out. These indicators can take several forms: average execution time, complaint rate, number of back-and-forth exchanges, process automation rate, etc.

This step is also strategic for getting stakeholders on board: there's nothing like a clear, shared objective to create alignment between management, business units, and IT.

A wealth management company was dealing with frequently incomplete client files, leading to delays and lost revenue. After automating the file processing process with Iterop, processing time was reduced by 40% and revenue increased.



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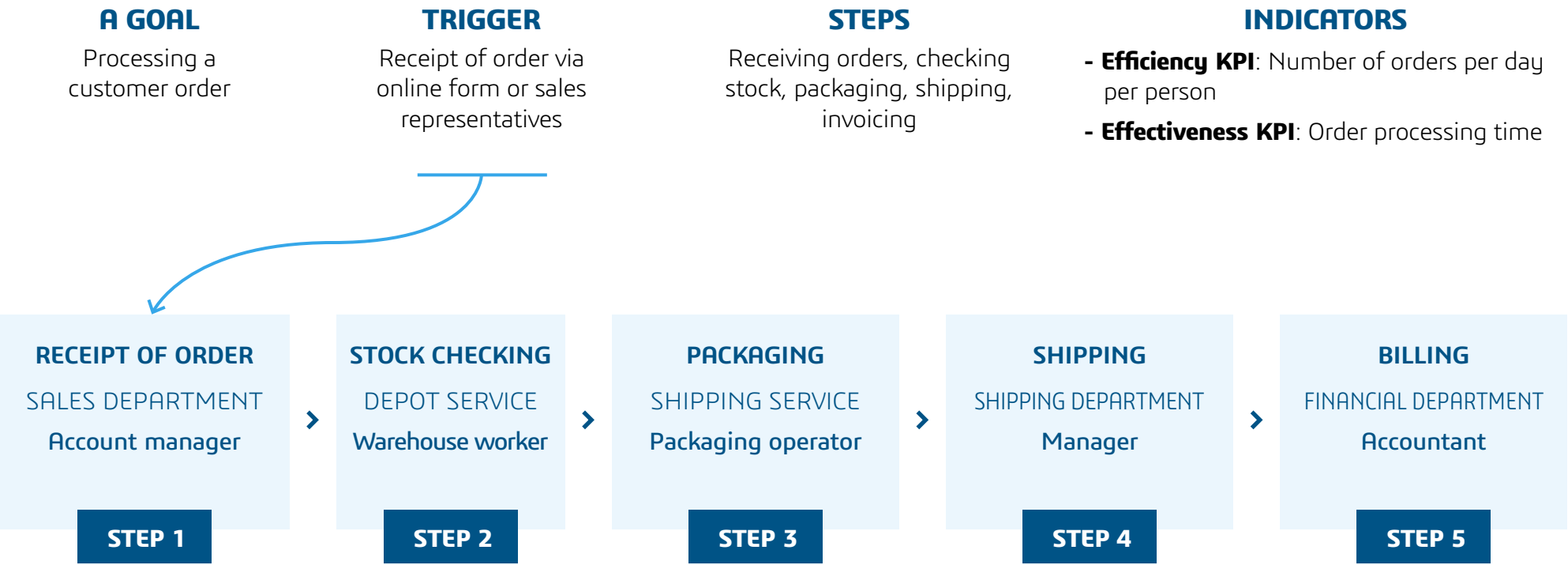
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PRACTICAL EXAMPLE

Let's take the same example of the order management process through to delivery. Here, the very macro representation of the process allows us to focus on the various points that need to be defined:



Once you have defined each step precisely, it is important to assign a specific person to each step who will be responsible for carrying out the task. In this example, the people involved are: the customer service representative, the warehouse clerk, the packaging operator, the manager, and the accountant.

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3.

SET THE RIGHT TONE FROM THE START

Once the processes have been mapped out and the objectives set, you must then precisely define the scope of your process approach. This means choosing:



The order in which the processes will be handled;



The relevant departments or subsidiaries within the company;



The desired level of automation (notification, validation, integration, etc.).

Framing allows you to set realistic limits and avoid the “tunnel” syndrome: a project that is too broad, too long, and ends up getting bogged down. Preferably, start with a process that is visible enough to create impact, but not too complex, to ensure rapid production. This is also the stage at which the project team is structured, with a sponsor, a business leader, a technical advisor, and, if possible, an end user. This lightweight but committed organization is a key factor for success.

4.

TEST, ADJUST, EVOLVE

Once the process has been modeled and configured in the chosen BPM tool, it is time for testing. This involves simulating real-life scenarios to check that:

- Roles are correctly defined.
- Business rules are being followed.
- Technical integrations are working (with ERP, CRM, etc.).
- The interface is “understandable” for end users.

This testing phase is ideally carried out with a sample of real users. This allows for quick adjustments to be made before moving on to a wider rollout.

Going live does not mark the end of the project, but rather the beginning of its active life. User feedback must be listened to, bugs fixed, and improvements gradually integrated. This is where the “agile” approach comes into its own.

In addition, the process must be regularly reevaluated. Modern BPM tools enable real-time monitoring of the indicators defined above. This continuous monitoring feeds into a continuous improvement loop, which is essential for maintaining the relevance of the process in a work environment that is itself constantly evolving.

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CHAPTRE 4: HOW TO CHOOSE THE RIGHT BPM PLATFORM?

Office suites have long been the preferred tools for managing business activities, but they are not very effective at tracking activities and managing information flows. That is why new tools (such as Iterop) have appeared on the market: comprehensive software solutions that enable you to centralize data, automate tasks, and track processes in real time.

The BPM (Business Process Management) platform chosen by your teams will be the central tool for this transformation, providing you with a reliable and robust technical foundation. It must meet your specifications, as well as a broader vision of governance, fluidity, and scalability. The choice of this platform is therefore strategic!

With this tool, you can design your process, assign roles and tasks to your employees, automate actions, alerts, and email notifications, and, above all, you now have excellent visibility of all stages of the process.

- **How it works**
- **Essential criteria: low-code, integration, traceability, UI/UX**
- **Other selection criteria: security, governance, scalability**
- **The benefits of a centralized platform for automation**

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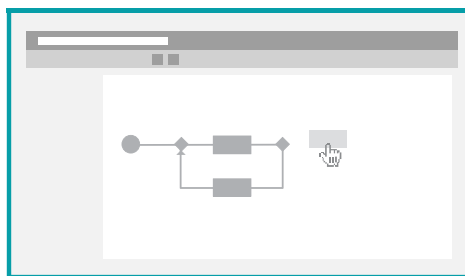
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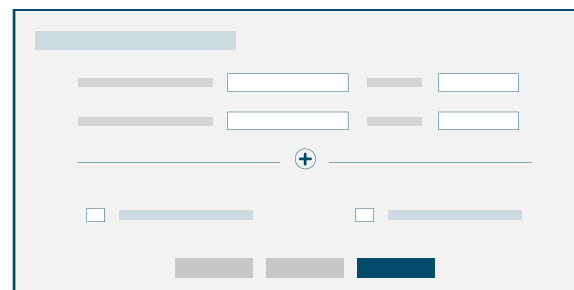
HOW IT WORKS

1 DESSINER



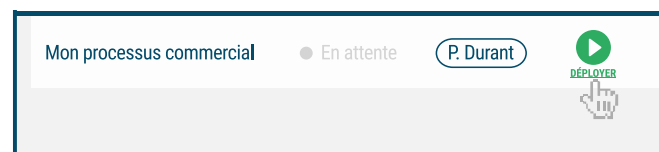
Drag and drop items onto the drawing area

2 CONFIGURE



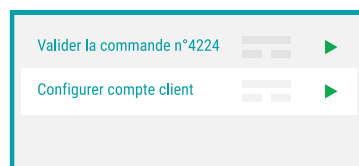
Add the actors & the IS to the process

3 IMPLEMENT



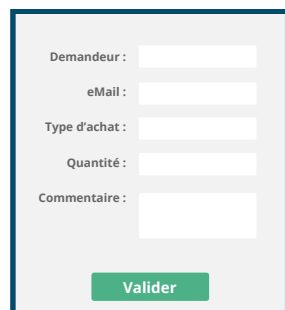
Roll out the process across your entire organization

4 TO DO



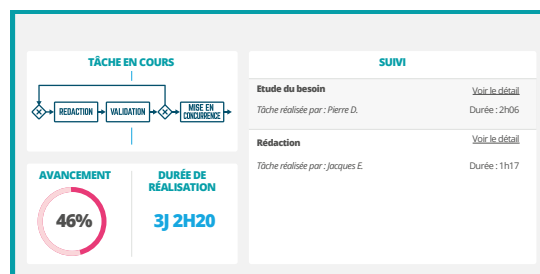
Receive notifications about tasks to be completed

5 COMMUNICATE



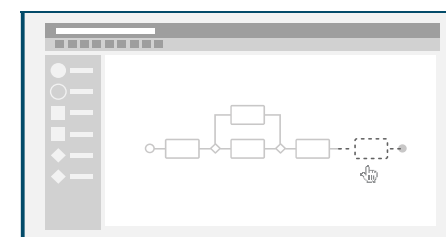
Complete the dedicated form to complete the task.

6 FOLLOW



Follow the progress of exchanges closely

7 IMPROVE



Update your processes without service interruption

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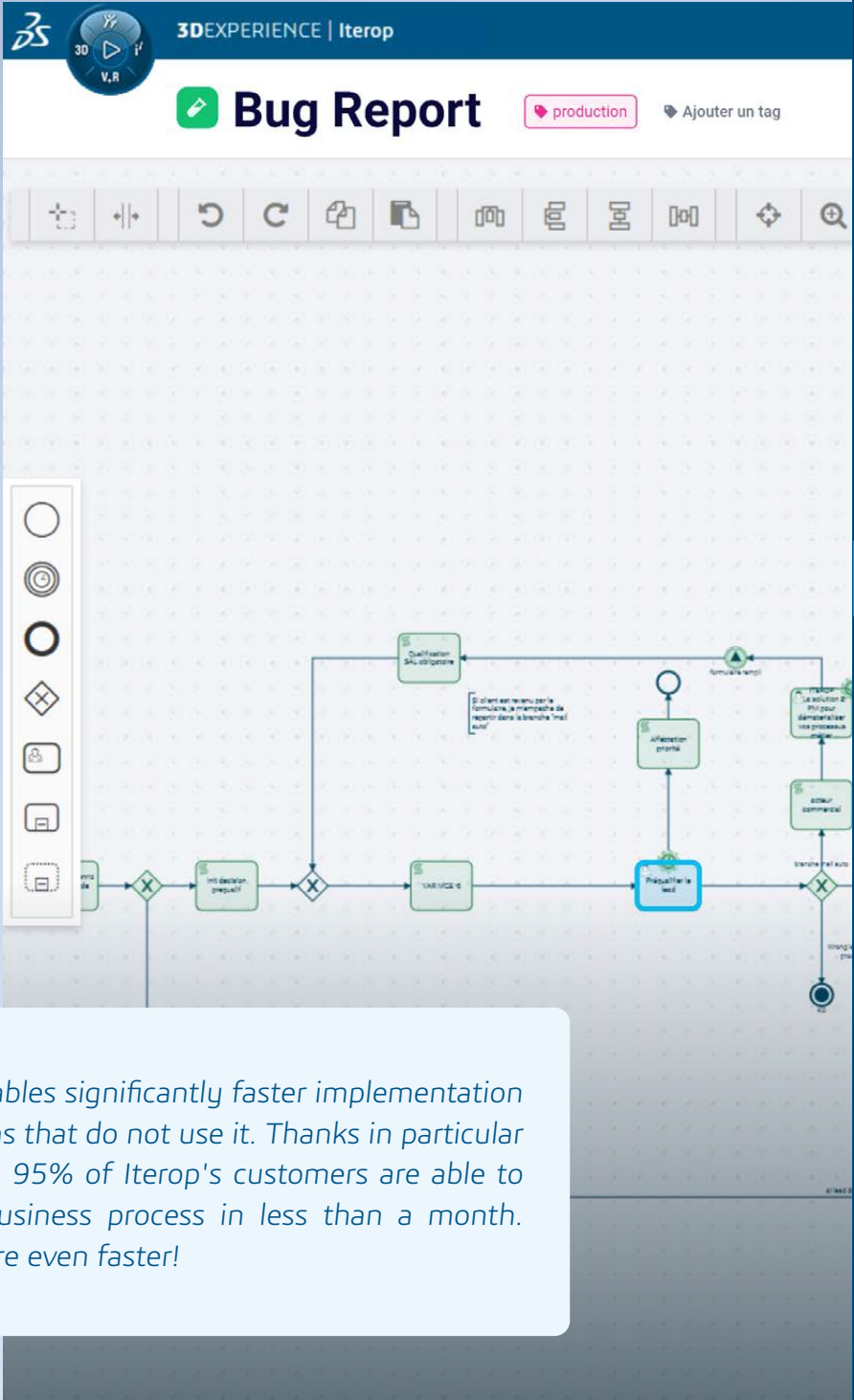
ESSENTIAL CRITERIA: LOW-CODE, INTEGRATION, TRACEABILITY, UI/UX

A good BPM platform must combine technical power and business accessibility. This is where low-code technology comes into its own. It allows your business teams to design and develop processes without having to rely on the IT department or an IT expert. This translates into considerable time savings, better ownership, and faster time to market.

Another essential criterion is integration. The “right tool” must be able to communicate easily with existing tools (ERP, CRM, HR tools, EDM, etc.). This requires the availability of native connectors, but also the ability to create custom integrations when needed, via open APIs, for example.

Traceability is also non-negotiable. Every action, every validation, and every document must be trackable and auditable. This ensures regulatory compliance and proactive management of malfunctions.

Finally, it goes without saying that the user experience (UX/UI) of the BPM platform must be carefully designed. An interface that is too technical or confusing will slow down adoption, even for well-designed processes. The BPM platform must allow you to build simple interfaces that can be adapted to different roles and uses, both on desktop and mobile devices.



The use of low-code enables significantly faster implementation than competing solutions that do not use it. Thanks in particular to this approach, nearly 95% of Iterop's customers are able to implement their first business process in less than a month. Subsequent processes are even faster!

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OTHER SELECTION CRITERIA: SECURITY, GOVERNANCE, SCALABILITY

Data security and access governance are critical elements for any business. Your BPM platform must therefore enable fine-grained rights management: who can access which process, at what stage, with what permissions (read, edit, validate, etc.)? This granularity is essential for complying with internal rules and regulations (GDPR, ISO, etc.).

In terms of scalability, a solution that is suitable today must be able to absorb tomorrow's increased workload without causing slowdowns, instability, or major redesigns. The number of users, the volume of data, and the complexity of processes must be able to evolve as your organization grows or diversifies, without compromising its technical architecture. The right tool should allow you to add new workflows, integrate third-party services, easily change business rules, or extend coverage (multiple sites, languages, time zones).

Multi-device support is now essential. More and more employees are involved in processes while on the move. A good BPM solution should offer a responsive interface or a native mobile app, allowing you to approve a request or view a dashboard from a smartphone or tablet.



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THE BENEFITS OF A CENTRALIZED PLATFORM FOR AUTOMATION

Automating an isolated process can produce a one-time gain. But it is by centralizing process management within a single platform that a company achieves real economies of scale and gains consistency. A centralized platform allows you to:

- avoid duplication between tools or services;
- gain a global view of all business processes;
- capitalize on best practices and reusable components (form templates, business rules, connectors, etc.);
- feed consolidated dashboards for strategic management.

It then becomes a digital backbone: it connects different departments, streamlines exchanges, and aligns practices. It also facilitates the deployment of new processes, based on a modular and scalable approach.

Choosing a SaaS BPM platform further enhances these benefits. Hosted in the cloud and accessible from any connected device, this type of solution guarantees continuous updates without any technical intervention on the customer's side, while benefiting from the latest functional and security developments. It also offers rapid deployment without infrastructure investment and is perfectly suited to multi-site or hybrid organizations. In addition, a good SaaS publisher can ensure high availability, data reversibility, and compliance certifications (ISO 27001, GDPR, etc.).



Colas used Iterop to digitize its compliance processes, particularly in managing the group's compliance procedures. This digitization has enabled better traceability, reduced delays, and improved regulatory compliance. Our tool is used by Colas teams in 43 countries.

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CHAPTRE 5: HOW TO STRUCTURE AN EFFECTIVE PROJECT TEAM?

A powerful tool is not enough. The success of a BPM project also depends on the team behind it. At Iterop, we call these team members “process designers.” Structuring this team with the right profiles, the right responsibilities, and clear leadership is essential for moving forward quickly and avoiding bottlenecks.

- **Key roles: sponsor, project manager, business experts, IT advisor**
- **Mobilize teams, manage change**

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KEY ROLES: SPONSOR, PILOT, BUSINESS EXPERTS, IT ADVISOR

An effective process approach relies on balanced governance between strategic vision and operational execution. Here are the essential roles to include in the team:

The “sponsor”

(often a member of the executive committee or a business unit manager) gives the project legitimacy. He or she decides on priorities, mobilizes resources, and ensures alignment with the company's overall objectives.

The project “pilot”

ensures operational coordination. He is responsible for planning, progress, risks, and relations with the publisher or integrator.

The “business experts”

are at the heart of the system. They are the ones who know the existing processes, which ones need to be automated, and the specifics on the ground. They participate in modeling and testing, and play a key role in helping teams adopt the new processes. They are often the ones who initiate requests for process automation and digitization. Some of our clients leave the creation of the first versions of the process to these “citizen developers.”

The “Process designers”

(internal or external) translate business needs into clear, modeled, and deployable processes. They configure processes in the BPM platform using low-code tools such as Iterop. These profiles can be internal “citizen developers” or consultants. When several people take on these tasks, they form the “Digital Factory,” a real driver of process transformation and industrialization.

The “IT representative”

ensures technical consistency: security, integration with existing systems, compliance with internal standards, etc. It also facilitates communication with external technical teams.

The pilot in question must be an enthusiastic leader who is fully committed to the idea and motivates both users and management to ensure the project runs smoothly. He or she helps overcome any issues that arise and makes the necessary decisions. Once the project is complete, this person promotes the results to senior management.

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MOBILIZE TEAMS, MANAGE CHANGE

User buy-in cannot be imposed. It is built up from the very first stages of the project. Too often, automation projects are perceived as top-down, designed in a vacuum, without taking into account the realities on the ground. Involving employees from the diagnostic phase onwards helps to avoid this pitfall, enables solutions to be co-constructed, and above all, leverages internal expertise. It also promotes greater ownership: it is easier to adopt a tool that you have helped to design.

Change management must be thought of as a project in its own right, with resources, team representatives, and a strategy for listening to and addressing criticism after deployment. This approach also involves making your employees aware of the changes (in their jobs) that the new way of working will bring.

Managers are responsible for communicating about this new way of working, explaining its benefits for the company and its teams.



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CHAPTRE 6: **FROM MODELING TO PRODUCTION: BRINGING A BUSINESS PROCESS TO LIFE**

Let's take a closer look at some crucial steps: modeling, followed by digitization of the process, then implementation on a pilot scale. It is during this transition from theory to practice that projects take shape... or fail.

- **Model a process: clarify to structure**
- **Digitize the process: build without coding**
- **Pilot production: test the process in real life**
- **Analyze feedback, adjust, and stabilize**

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MODELING A PROCESS: CLARIFY TO STRUCTURE

Modeling consists of translating often implicit business processes into a clear, logical, and digitally usable sequence of steps. This visual, low-code representation is based on the BPMN 2.0 standard. Each step in the process is identified:

- Who does what?
- When and under what conditions?
- What data is handled?
- What validations or decisions are required?

The aim is not to reproduce the existing complexity, but to break free from it: we are looking for a streamlined and optimized operation. Modeling also makes it possible to anticipate bottlenecks, unnecessary loops, or technical dependencies that will need to be integrated later. This step is carried out in a workshop with business users to create a strong collective dynamic, encourage quick decisions, and validate the diagram.

DIGITIZING THE PROCESS: BUILDING WITHOUT CODING

Once modeled, the process is configured in your chosen BPM tool. Using an intuitive graphical interface, you can configure:

- input forms (fields, attachments, drop-down menus, etc.);
- business rules (conditions, connections, maximum durations, etc.);
- user roles (who sees what, who approves what, with what rights);
- automated tasks (notifications, reminders, dynamic assignments, etc.);
- integrations with other tools via API or connectors (ERP, CRM, EDM, etc.).

This phase allows you to move from a static vision to a dynamic operation by quickly testing sequences, access, and conditional logic. You can then identify areas for optimization, specific adaptations to be implemented, or adjustments to wording to improve usability. The result is an operational process that is ready to be tested with real users.

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PILOT PRODUCTION: TESTING THE PROCESS IN REAL-WORLD CONDITIONS

Instead of doing a “big launch” across the entire company, best practice is to roll out the process on a small scale first, with a pilot group representing the various end users. This group will test the process in real-world conditions, report any malfunctions or friction points, and help adjust the settings before a wider rollout.

This pilot phase helps to secure the launch by validating:

- the fluidity of the sequences;
- the relevance of business rules and alerts;
- the clarity of interfaces and labels;
- proper integration with third-party tools.

It also confirms user buy-in and verifies that the solution is intuitive and well suited to everyday use.

With Iterop, a process can be put into production in just a few hours. Thanks to its intuitive low-code interface, it is possible to move from idea to execution without delay, often in half a day.



ANALYSER LES RETOURS, AJUSTER ET STABILISER

The advantage of a modern BPM tool such as Iterop is that it allows changes to be made on the fly, without interrupting service. This enables rapid and continuous adjustments to be made:

- Add a forgotten validation step.
- Modify a deadline rule or assignment.
- Correct a display condition or a poorly worded field.

At the same time, the indicators integrated into the platform (processing time, completion rate, bottlenecks, etc.) help improve performance and fuel exchanges with business teams. Once feedback has been incorporated and operations have stabilized, the process can then be rolled out on a very large scale without any redesign.

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CHAPTRE 7: FOCUS ON TWO KEY PROCESSES TO INSPIRE YOU

In any organization, certain processes have a direct impact on productivity, customer satisfaction, reputation, and profitability. Two of these processes are consistently found in BPM projects: complaint handling and order processing. Critical, cross-functional, and often ripe for improvement, they are ideal starting points.

- **Customer complaints: a lever for loyalty... or frustration**
- **Order processing: how can it be streamlined?**

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CUSTOMER COMPLAINTS: A LEVER FOR CUSTOMER LOYALTY... OR FRUSTRATION

A poorly handled customer complaint means a lost customer. A well-handled complaint often means a loyal customer. This process involves several departments: customer service, logistics, quality, and sometimes legal. It often suffers from multiple flaws:

- information scattered across emails, calls, and files;
- lack of traceability of exchanges;
- excessive response times;
- lack of follow-up or automatic reminders.

Automating the process allows you to centralize requests, automatically record each complaint using a structured form, assign a person responsible for handling it, and track its progress in real time. Business rules allow you to prioritize certain requests (VIP, legal dispute, serious incident) and send internal notifications or automatic responses to the customer at each stage.

Danone integrated Iterop to optimize its customer and supplier complaint management processes. Thanks to this automation, processing times have been cut in half, improving responsiveness and partner satisfaction.



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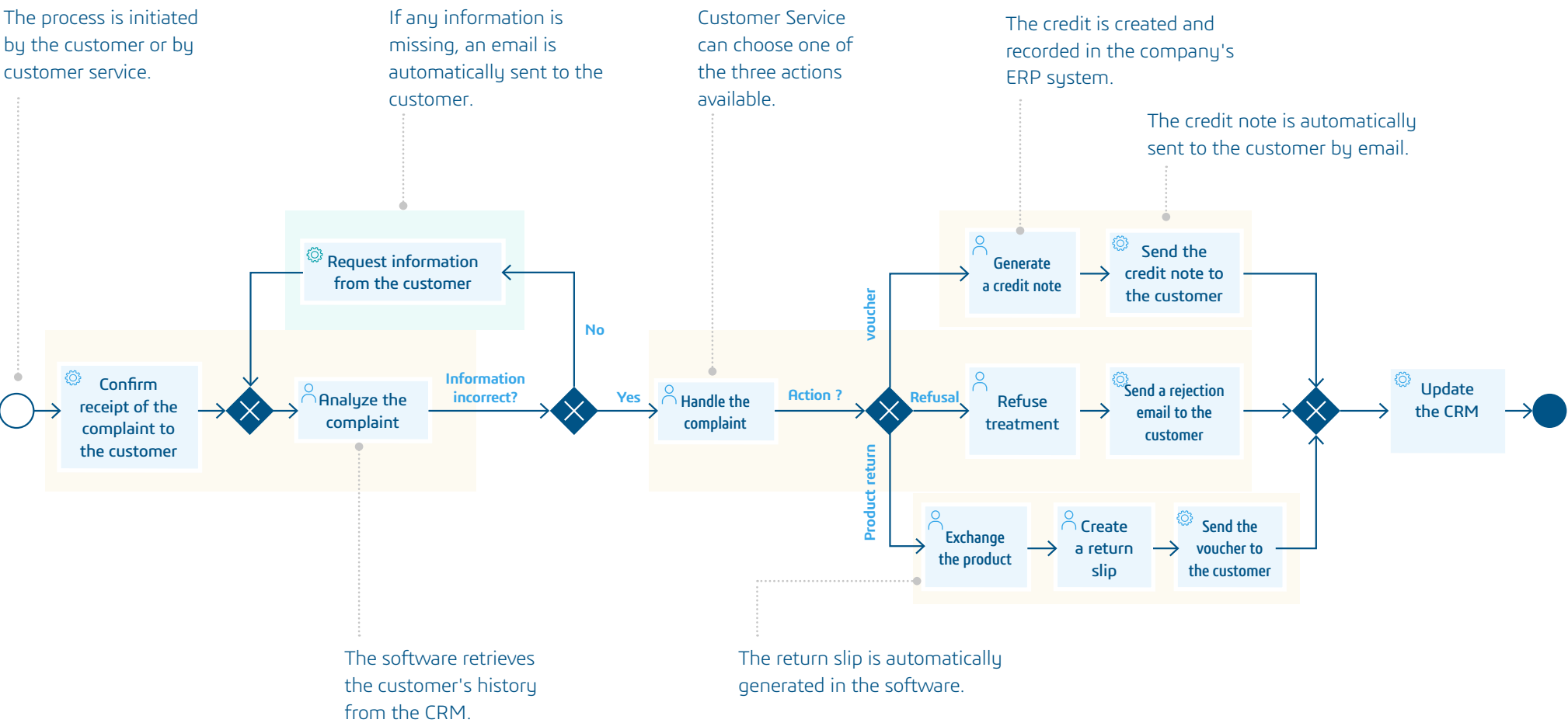
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HANDLING CUSTOMER COMPLAINTS

Here is an example of a customer complaint management process. Of course, every company has its own way of doing things, so this is just a typical example that brings together actions related to complaint handling. You can easily adapt this process to your actual way of working.

- After-sales department
- Sales department



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ORDER PROCESSING: HOW CAN IT BE STREAMLINED?

Another highly strategic process is order processing. From receipt to delivery, including sales validation, inventory management, and invoicing, every step counts. A malfunction at this level can block your production, create commercial tensions, or generate invoicing errors.

This process is often spread across several departments or disconnected tools. The result: duplicates, data entry errors, delays, and a lack of visibility into work in progress.

Automation allows you to synchronize all stakeholders and systems. As soon as an order is entered, it can be:

- automatically validated according to predefined rules (customer limit, available stock);
- forwarded to production or logistics;
- tracked via a dashboard by the sales teams;
- connected to the billing or shipping system.

Alerts are generated in the event of anomalies (delays, stock errors, incomplete orders) to avoid bottlenecks at the end of the chain.



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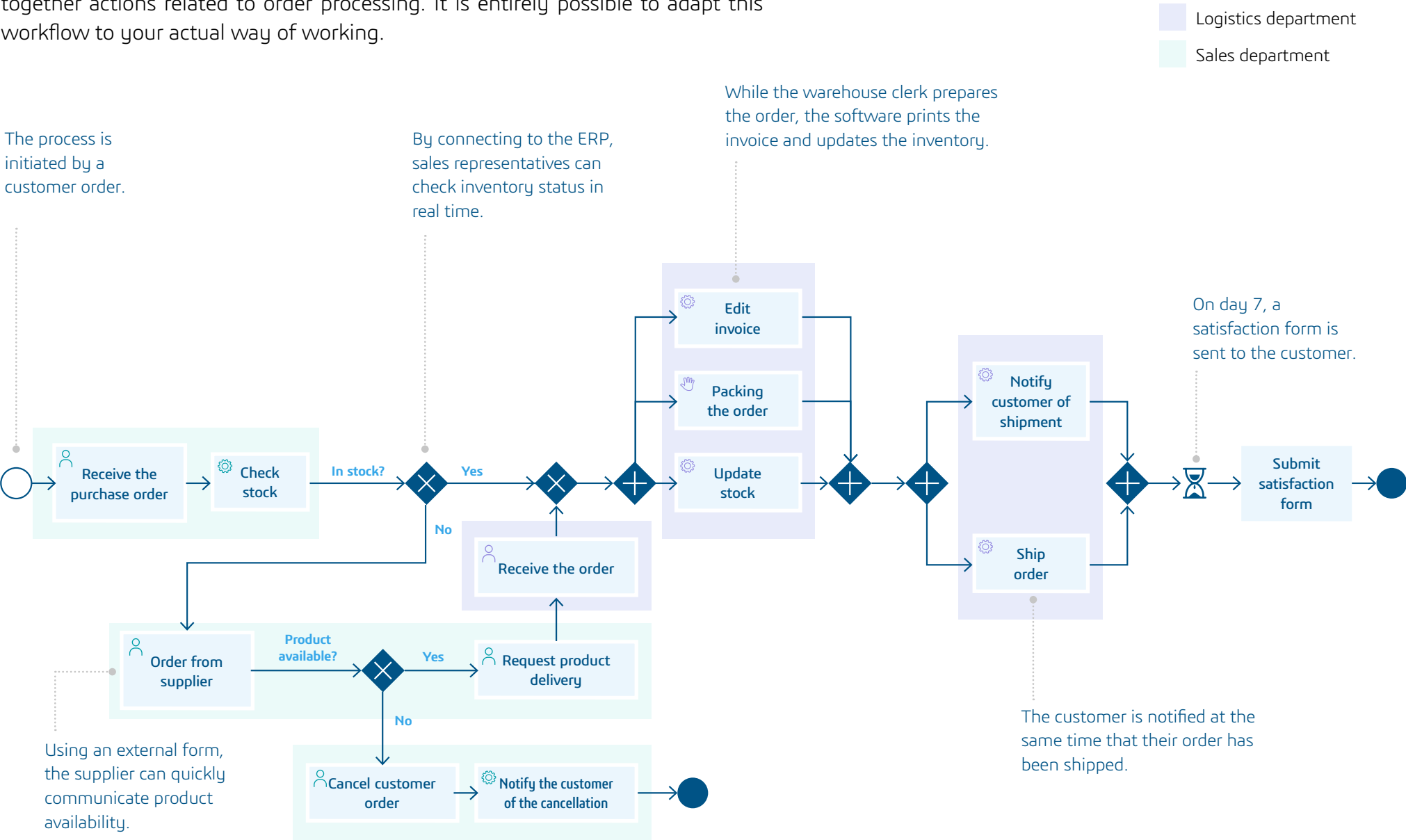
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ORDER PROCESSING

Here is an example of an order processing workflow. Of course, every company has its own way of doing things, so this is just a typical example that brings together actions related to order processing. It is entirely possible to adapt this workflow to your actual way of working.



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YOUR ORGANIZATION MORE STREAMLINED

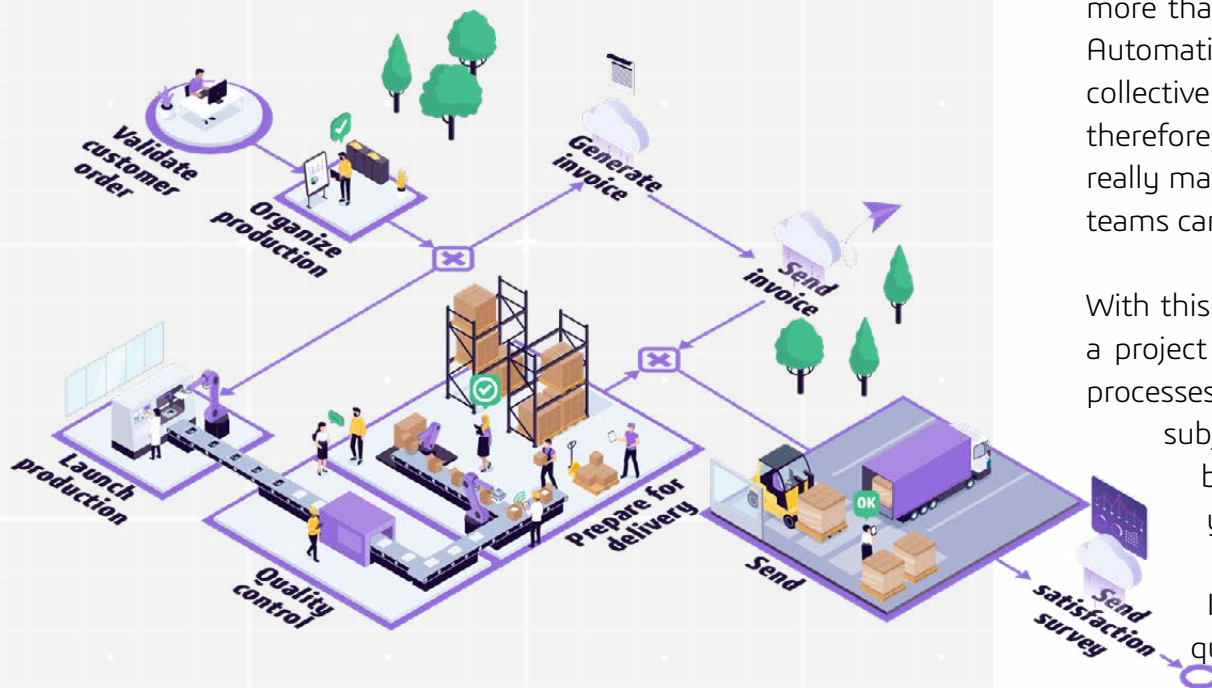
Digitizing business processes is not about applying a layer of technology to old ways of working. It is a more ambitious undertaking: rethinking how an organization acts, makes decisions, and cooperates. BPM makes everyday life easier for professionals by providing the right information at the right time and digitizing certain pre-existing tasks.

In a world where speed of execution makes all the difference, structuring processes and making them visible, manageable, and scalable is much more than a competitive advantage—it is a vital necessity for growth. Automation is above all about clarification. And clarification frees up collective energy, restores control, and makes actions more secure. It is therefore not a question of “going faster to go faster,” but of doing what really matters better. It's about simplifying everyday tasks so that your teams can focus on adding value.

With this white paper, you now have the essential knowledge to start a project to improve your processes, whether it's optimizing existing processes or integrating new ones. It is not intended to close the subject, but rather to open the way forward. The next process to be transformed is not written here: it is in your operations and your ambitions. It's up to you to seize it.

If you would like support in your efforts, or if you have any questions about Iterop, please don't hesitate to contact us!

Your business processes now digitized



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Should everything be automated at once?

No. It is better to start small, with a key process that is visible and has high potential for gains. This allows you to quickly demonstrate the added value of the approach and get teams involved.

Is it an IT or business project?

Both. Success depends on a combination of factors: business expertise for operational knowledge, and IT for technical consistency and security. A low-code platform is the ideal way to streamline this collaboration.

What should you do if the processes are not yet well defined?

This is precisely the opportunity to clarify them. Modeling brings implicit rules, dependencies, and responsibilities to light. It is a structuring step that is as useful as automation itself.

How long does it take to see the first results?

In general, the first benefits are visible within a few weeks, sometimes within a few days: reduced lead times and errors, better monitoring. And above all, better understanding of the processes by the teams!

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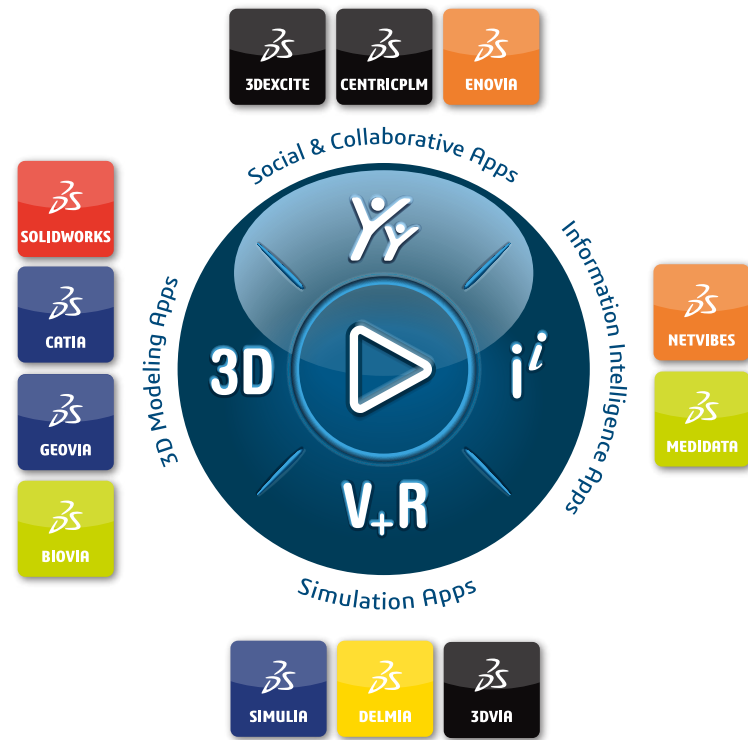
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Our **3DEXPERIENCE®** platform powers our brand applications, serving 11 industries, and provides a rich portfolio of industry solution experiences.

Dassault Systèmes, the **3DEXPERIENCE** Company, is a catalyst for human progress. We provide business and people with collaborative virtual environments to imagine sustainable innovations. By creating ‘virtual experience twins’ of the real world with our **3DEXPERIENCE** platform and applications, our customers push the boundaries of innovation, learning and production.

Dassault Systèmes’ 20,000 employees are bringing value to more than 270,000 customers of all sizes, in all industries, in more than 140 countries. For more information, visit www.3ds.com.



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