



Rational software

## **Better management through process automation.**

*David Lawrence, technical marketing specialist*

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**Introduction**

The demands of good business practices, competition and government regulation constantly push companies to reexamine, update, modernize or replace their business processes. Efficient and effective business processes that meet changing conditions can distinguish an organization from its competition and can be key differentiators.

Business processes often evolve iteratively, beginning as manual, undocumented procedures. As the business environment becomes more complex, a business must continually evolve its processes to remain competitive.

This paper outlines the challenges of effective business process management, the capabilities needed to address those challenges and how IBM Rational® ClearQuest® change management software can be used to automate business processes for improved effectiveness and control. The paper then presents a real-world example of a health insurance provider using Rational ClearQuest software to successfully manage its compliance business process.

**Challenges of effectively managing business processes**

In large organizations, business processes often span many departments and involve many stakeholders. Manual, undocumented processes based on practices such as ad hoc e-mails, local databases or spreadsheets are difficult to control. Manual processes are slower and more difficult to visualize and understand. They raise the risk that a stakeholder might be working with partial or outdated information, and create opportunities for guesswork and improvisation. For geographically distributed organizations, ensuring that all stakeholders—individual contributors, managers, executives—have accurate, timely information is further complicated.

A process that is not fully automated, not clearly visible to all stakeholders and not able to transparently support a geographically distributed organization cannot adequately address today's complex and time-sensitive business needs. Stakeholders can never be sure they are working from complete, correct, up-to-date data. Ascertaining what activity was done, who did it and when—to say nothing of whether it was performed in the correct sequence, at the right time and with the right information—is at best difficult. The basic management tasks of analysis, enforcement and auditing can evolve into frustrating, time-consuming, error-prone and ultimately unproductive efforts.

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**Highlights**

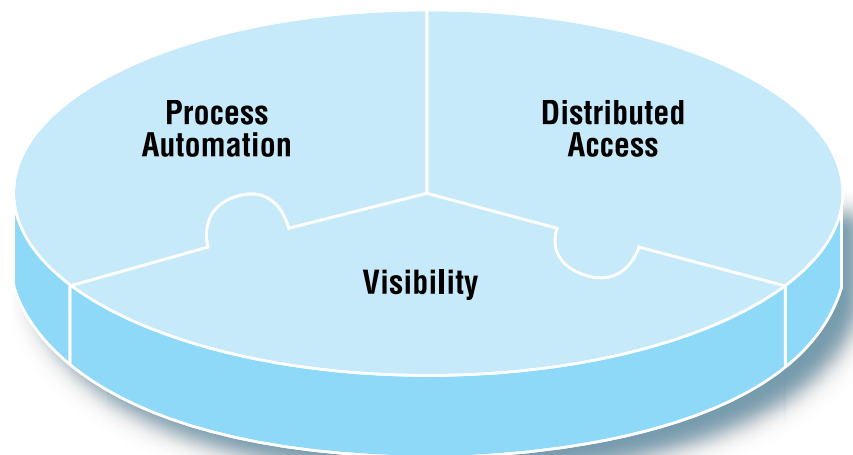
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***Automating the management and workflow of a business process improves control and enforcement—and reduces exposure to costly delays, errors and omissions.***

**Taking control of your business processes**

Teams work most effectively when they have clear guidance and do not need to resort to guesswork or folklore. A solution that can automate the management and workflow of a business process can provide control and enforcement; can help ensure the right things are done at the right time; and can reduce an organization's exposure to costly delays, errors and omissions. A solution that can improve visibility into processes and related information can improve insight for better business decisions. And a solution that can support distributed organizations and enable you to access the information you need, regardless of location, can improve communication, collaboration and coordination of geographically distributed teams.

Through process automation, IBM Rational ClearQuest software can help you create repeatable, enforceable, managed processes. By making process enforcement transparent, Rational ClearQuest software helps organizations stay focused on their real mandate—delivering value to the business. Rational ClearQuest software improves visibility into projects and processes with real-time status and reporting. It also provides multiple methods of distributed access so team members can access up-to-date information, where and when they need it. Rational ClearQuest software is a natural fit for managing the many aspects of a complex business process.



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**Highlights**

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***IBM Rational ClearQuest provides notification and control mechanisms that can synchronize and automate team activities and help reduce administrative overhead.***

***The robust palette of reporting tools helps you visualize and simplify complex process analysis and oversight tasks.***

### **Process automation**

Rational ClearQuest software includes many out-of-the-box workflows. You can install the product, select a workflow and be up and running with an automated business process quickly and easily.

You can use the fully featured graphical designer to further configure Rational ClearQuest software to reflect your process, or you can create a new process from scratch. Either way, implementing your process is easily accomplished with a visual drag-and-drop forms editor and drop-down menus. In most cases, even complex processes can be implemented within a few hours.

A robust, sophisticated e-mail notification system automatically notifies stakeholders of required actions or events throughout the process. This notification system helps ensure that the right actions are completed at the right time by the right people.

Rational ClearQuest software's sophisticated notification and control mechanisms can eliminate many of the traditional means of coordinating and synchronizing teams and activities, such as status meetings, conference calls and e-mail distribution of meeting minutes, spreadsheets or other artifacts. Shifting low-level administrative tasks to Rational ClearQuest software frees staff to focus on higher-value activities.

### **Process visibility**

Rapid and straightforward analysis and reporting of process activity is central to effective process management. Rational ClearQuest software provides stakeholders with instant access to the information they need. Up-to-the-minute information and a clear indication of what actions are required, when and by whom, are easily viewed on a Web page or a local desktop client. Changes or updates made to activities or tasks are immediately visible.

Analysis and oversight are simplified with a robust palette of reporting tools. With a few mouse clicks, managers can easily create or retrieve activity reports on nearly any aspect of process activity. Easy-to-use menus enable users to quickly create a wide variety of graphs, bar charts and pie charts to further aid project and process analysis.

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Highlights

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***Supporting multiple approaches to remote access enables collaboration that is not limited by geography; process activities, changes and updates are available to all team members, as they occur, regardless of location.***

**Supporting distributed organizations**

Technological advances and innovative management have enabled new organizational structures. Home office workers, outsourcing, and more sophisticated partner and supplier relationships all stretch the capacities of the traditional central office local network. With these new operating paradigms, it is essential that stakeholders have instant access to up-to-the-minute process information.

With Rational ClearQuest software, all process data is stored in a central repository and can be accessed from a wide range of clients: a secure Web browser; a Microsoft® Windows®, UNIX® or Linux® desktop; or an integrated development environment (IDE). Changes and updates to process data are immediately recorded in the central database and instantly available to other team members, whether they are down the hall or across the globe.

You can also seamlessly replicate your data repository to multiple sites. With this feature, stakeholders at physically remote sites or third parties without a direct wide area network (WAN) connection can work with the same data and artifacts, in real time, as the rest of the team.

With these multiple approaches to supporting distributed organizations, geography is no longer an impediment to timely and effective collaboration.

**A proven solution with proven results**

Assurant Health provides health insurance coverage for more than one million people nationwide. Its underwriting companies' primary products include individual medical, small group, short term and student health insurance products, as well as non-insurance products and consumer-choice products such as Health Savings Accounts and Health Reimbursement Arrangements. With almost 3,000 employees, Assurant Health is headquartered in Milwaukee, Wisconsin, and has operations offices in Minnesota, Idaho and Florida, as well as sales offices across the country.

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Highlights

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***With successful implementation of Rational ClearQuest software in a number of IT projects, Assurant Health determined that the automated workflow solution could also help manage its compliance process.***

***Rational ClearQuest software's out-of-the-box workflow and automated control, enforcement and notification features were easily customized to automate the compliance process workflow.***

Assurant Health had been using a manual process to manage its compliance issues. It had been recording these issues in an electronic spreadsheet. The spreadsheet was then sent via e-mail to stakeholders for action. The stakeholders are distributed across several different sites. As work progressed, the spreadsheet would be updated, then repeatedly updated and redistributed. It was difficult to ensure that all stakeholders were working from complete, accurate and up-to-the-minute information. This adversely affected their ability to turn around compliance issues in a timely manner.

It was becoming clear that Assurant Health needed a better way to manage its compliance process. It required that team members across the business and across locations could collaborate effectively on compliance issues. It needed a solution that automated the administrative aspects of the compliance workflow, such as notification, control and enforcement. It needed much better visualization of the process and artifacts, and it needed a solution that would seamlessly integrate the efforts of geographically distributed stakeholders.

Assurant Health was already using Rational ClearQuest software successfully in a number of IT projects. When Assurant Health staff began to identify the requirements for a commercial automated workflow solution, they realized that in Rational ClearQuest software, they already had the solution in-house.

Assurant Health implemented Rational ClearQuest software as the automated workflow solution for its compliance process. The result was tremendous. With Rational ClearQuest software, all of the compliance process activities and supporting information were now in one place. Stakeholders were able to work more efficiently, with confidence that wherever they were, they had access to complete and up-to-date information on compliance activities. What made the difference was an out-of-the-box workflow that could be easily customized with automated control, enforcement and notification features. A rich assortment of reporting and analysis tools addressed the need for improved visibility. The variety of remote access solutions solved the problem of a geographically distributed process. Rational ClearQuest software provided immediate and improved visibility into compliance issues to all stakeholders, regardless of their physical location.

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**Highlights**

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***Assurant Health's experience of automating its compliance process with Rational ClearQuest software was so successful that Rational ClearQuest software is now being considered for automating more business processes across the larger organization.***

This provided an immediate benefit to Assurant Health. It observed substantially faster turnaround of compliance cases with no loss of information, better communication among stakeholders and greatly improved efficiency, all of which made for a more cost-effective solution to managing its compliance issues.

Using Rational ClearQuest software to manage its compliance process was so successful that Assurant Health has now used Rational ClearQuest software to automate a second business process. Rational ClearQuest software is being considered for automating additional business processes across the organization.

**Conclusion**

An organization's success depends in part on the effectiveness of its process management. Manual processes can lead to costly delays, errors and omissions. Team members need access to up-to-the-minute information, whether they are located across the building or across the globe.

Rational ClearQuest software provides process automation that can help control and enforce business processes. It improves visibility into processes through real-time status and reporting. And you can access the information you need from virtually anywhere. Through these advanced capabilities, IBM Rational ClearQuest software gives you the power to take control of your business processes.

**For more information**

To learn how IBM Rational ClearQuest software can help manage and control your processes visit:

[ibm.com/software/rational/offerings/scm.html](http://ibm.com/software/rational/offerings/scm.html)



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