



# Signature

## Business Process Review

### Plan for Growth and Operational Efficiencies with a Business Process Review

As your business grows and changes, once highly-tuned processes often age and become outdated. Is it time to re-align Signature with your latest business processes to strategically plan for growth and improve operational efficiencies? Many businesses that have chosen to perform a business process review often wish they had done it years ago.

A business process review proactively identifies root cause inefficiencies along with a recommended course of action through a guided methodology. This begins with a 360-degree perspective of what's working and what's not working across departments. The process analyzes the most important inefficiencies to produce an executive summary along with a detailed analysis of the findings to strategically recommend the best system and process changes; the outcome of a business process review is a future roadmap, offering a plan for upgrades and enhancements to significantly improve your business.

#### The WennSoft Business Process Review

We will assign you a consultant who will pull from best practices across deployments, evaluate your business roadmap and provide solid recommendations that you can take back to your team for proactive planning or immediate action. This can be focused on specific business processes and time can be scheduled to shadow your users for streamlining day-to-day work.

*Who needs to participate?*

- A WennSoft consultant will lead the engagement, but key resources from the customer team such as operations, finance, IT, and end users, as well as an executive sponsor, are important for success.

*What should I expect prior to an onsite engagement?*

- You can expect a Microsoft Teams discovery and discussion around key pain points which the consultant will review prior to the visit.

*How long will the on-site take?*

- The on-site business process review is a three-day offering. You should expect to have your business leaders and end users involved for a few hours each day for shadowing and Q&A with the consultant.

*Can all or part of the on-site engagement be done remotely?*

- Yes, we can be flexible to schedule remote end-user meetings to review their processes along with the system setup options. However, some on-site engagement will lead to a more positive outcome.

*What are the business process review deliverables?*

- After the visit, the consultant will deliver a business recommendations document – refer to the business process review example deliverables.

*How often should it be performed?*

- Depending on the pace of change, we would recommend an annual or semi-annual review. It is especially effective when combined with an upgrade activity.

#### Example Deliverables

### Business Process Review TOC

Executive Summary of Findings

Policy and Process Decisions

Overview of the Most Important Issues

- Lost Revenue Causes
- Training
- Quote to Cash Process
- Complaint Resolution Process

Strategic List of Recommended Changes

- Reports/SmartLists
- Software Modules/Upgrades
- Other Projects

Departmental Review Findings

- IT Systems
- Parts/Purchasing
- Service Invoicing & Time Entry
- Service Departments
- Operations
- Sales
- HR/Payroll
- Job Cost Bidding Process

Future Deployment Plans

- Near Term – Next 3 Months
- Mid Term – 3 to 6 Months
- Long Term – 6 to 12 Months

**Is it time for a business process review to improve your Signature investment?**

Get the conversations started by contacting your [WennSoft customer success manager](#).



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