

COMPLEX BUSINESS OFFER APPROVAL PROCESS

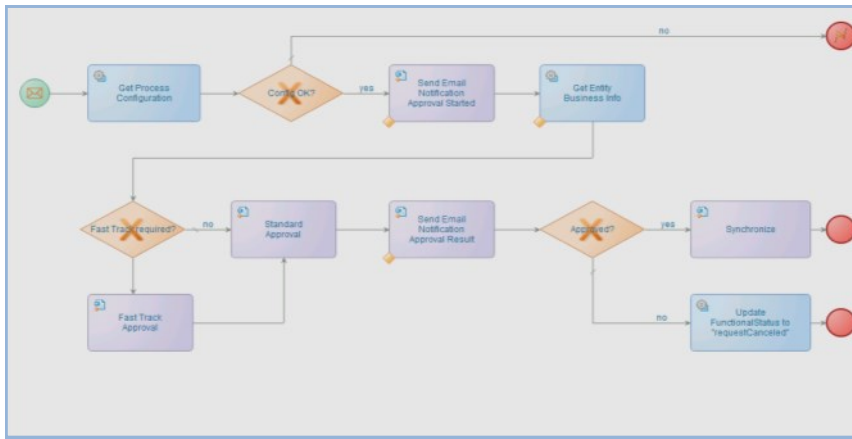
An approval process for comprehensive bids, which involve inputs from many units and sub-suppliers, can be definitely accelerated. However, is it also possible to increase certainty that the company makes only offers backed by sufficient resources and that financial risks are identified and controlled? Business Process Management (BPM) solution, managing the process across units, management levels and information systems, is the answer to these challenges.

A company delivers complex packaging products. Each business offer has to undergo an approval process, that ensures that all units (and sub-contractors) involved in the contract will have sufficient resources. The offer has to be confirmed by technical director, sales manager and in some cases also the financial director (and many others). Also a cross-check of data in some information systems will take place. Since each offer is individual and specific, also the nature of the approval process is very variable.

The speed determines in some cases whether the contract will be won or lost.

Model situation





Example process diagram with exclusive gateways when the process can continue only along one of the decision-making branches. Illustration from the [Cordys \(OpenText\)](#) environment, a BPM technology that Galeos uses for their customers.

Requirements

- Accelerate the process.
- Reduce the vulnerability to errors and omissions.
- No decision-making person should be omitted during approval process.
- Improve coordination between offer preparation and resource planning (people, machines, components, cash flow...).
- Save time of the key salesmen (project manager) who till now have to personally track each case.

Solution

BPM solution is implemented above legacy information systems to execute processes across the company. A project manager sets the work flow including mandatory verification steps for each project. He can choose from number of default process blocks, combine or alternatively modify them. Finally he starts the workflow. Later he can follow the approval progress of individual offers in the graphical interface. Responsible managers can see namely what offers are currently being approved and what resource requirements follow from them.

Alternative solutions

Hire more employees and assign a project manager to each process instance. To develop a custom application might not be feasible because of the need to cover all the process variants.

Similar situations and processes

A similar solution can be applied on any important approval process that changes frequently and where it is unacceptable to omit a verification point, thus for example:

- Introduction of new products
- Marketing campaigns approval
- Purchase of expensive spare parts

„The managers can see namely how many offers are currently being approved and what resource requirements follow from them.“

Benefits

- Process acceleration.
- Visualization of particular process progress (option to watch online).
- Ability to see a delay threat for particular process in advance.
- Making process faster and more effective.
- Elimination of low added value actions (the account managers can spend more time with customers).
- Coordination between approval process and resource updates in various information systems.
- Automatic or semi-automatic reports generation.



Galeos builds upon a strong BPM consulting team as well as extensive experience from projects in the Czech Republic and abroad. We help our clients to automate and standardize processes and activities and eliminate mistakes. We also help them to visualize, manage and optimize processes across the organization, bringing them process responsiveness and empowering business users to manage process changes.

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Please **contact us** to see whether our solution is apt for your company as well.