

Digitisation and Performance

An Interactive Workshop

**Session 3: Identifying
Improvement Opportunities and
Creating a Software Matrix**

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BUSINESS GROWTH + PERFORMANCE



Session 3: Identifying Improvement Opportunities and Creating a Software Matrix

Identifying Pain Points

Once you've identified what's holding you back, work to remove those inefficiencies. Gather a group together to brainstorm better ways to approach troublesome areas. For each of the pain points identified in the current state process map, generate and record ideas that may solve the problem.

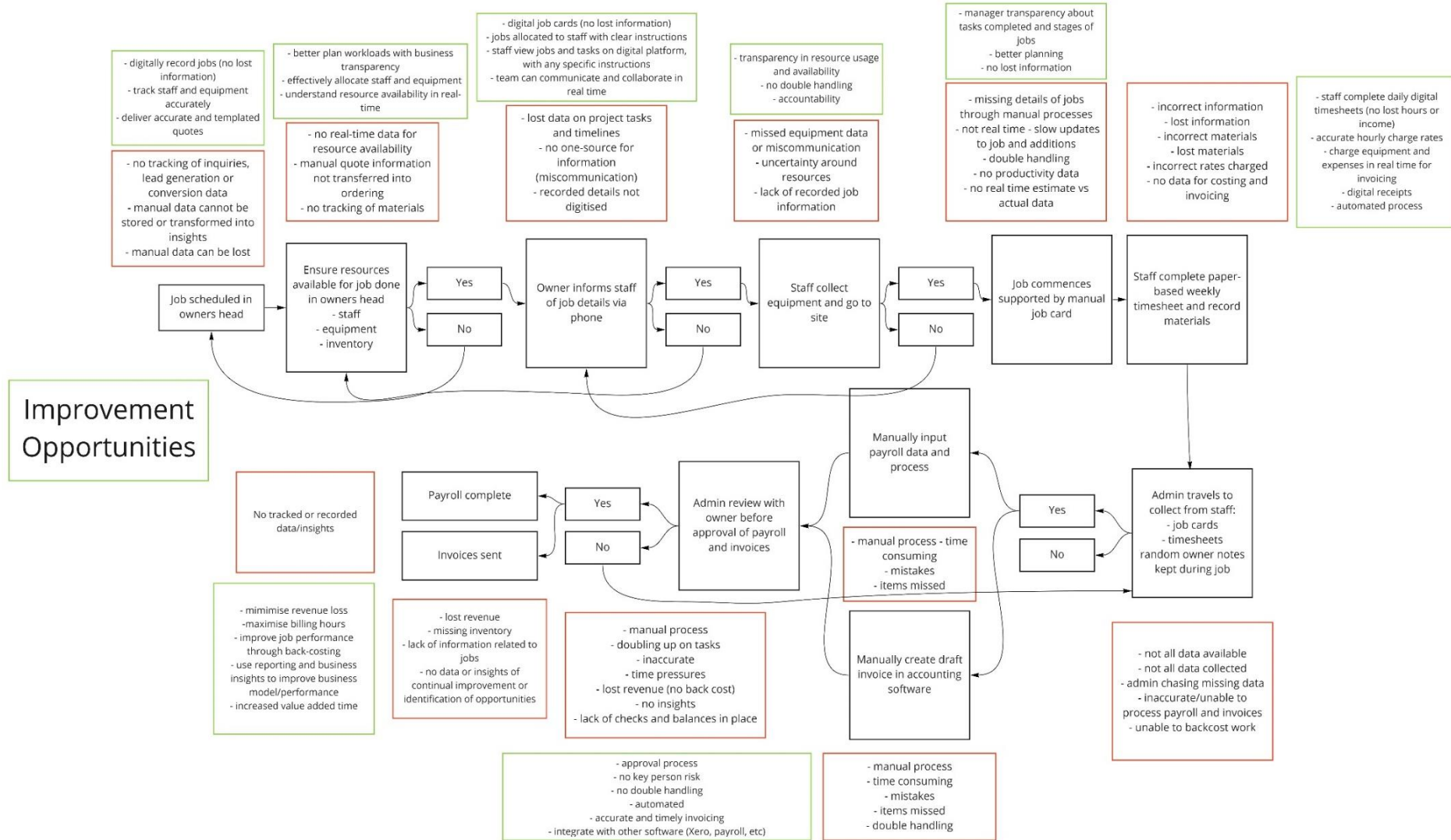
Ideas for improvement opportunities to deal with pain points can come from a wide range of lenses (this list is not exhaustive), including:

- Improving customer service/experience
- Reduced customer complaints
- Removing unnecessary steps
- Reducing wastage
- Increasing productivity
- Introducing checklists
- Cost savings
- Quality control or improving quality
- Reducing risk
- Increasing safety
- Refining user roles
- Employee training



- Staff onboarding
- Staff retention
- Workplace design
- Removing double handling or double entry
- Introducing software or automation
- Communication and collaboration.

Example Improvement Opportunity Identification



Identifying Software Functionality to Enable Desired State

Now you have identified the improvement opportunities, determine the functionality of software that could enable the realisation of these improvement opportunities. See our example below:

- DIGITAL FUNCTIONALITY
 - CRM for recording customers and opportunities
 - workflows for staff
 - job management
 - data flows continuous in system from job management to submitting invoice
 - inventory (real time)
 - scheduling (transparency)
 - project management to plan job and allocate tasks to staff
 - timesheets and expenses
 - time tracking for wages
 - accounting for financial function
 - integrated payroll
 - business insights and reporting
 - approval process for payments and invoices
 - hardware to enable staff to access software solutions where and when they need it
 - digital training resources
 - digital onboarding resources for staff
 - real time tracking of staff and equipment
 - forecasting and capacity planning



Create a Software Matrix

Once the software functionality has been completed, you can then go into further detail to complete a software matrix. This itemises and describes the exact functionality required for you to achieve the desired state of your internal business process. This is the due diligence part of the process improvement.

Use the functionality list to help to assess software are you are researching your options to understand if they are going to be suitable to address the requirements for your business.

Session Four: Change Management and Business Case



How about a coffee on us?

Let's catch up for a chat

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