Skan AI



Discover Automation With Process Intelligence

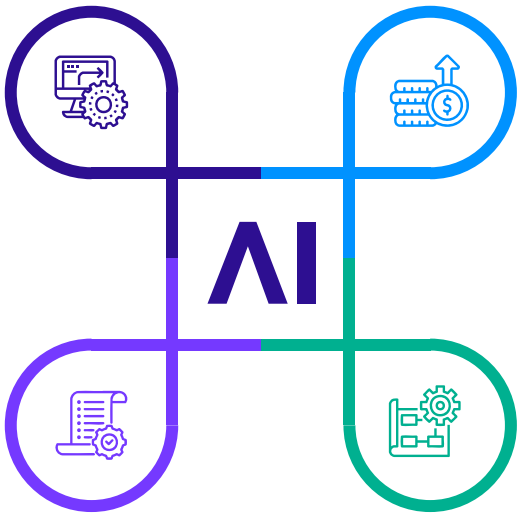
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This automation playbook was designed for:

Centers of Excellence
who need scalable methods to discover automation opportunities across multiple business units

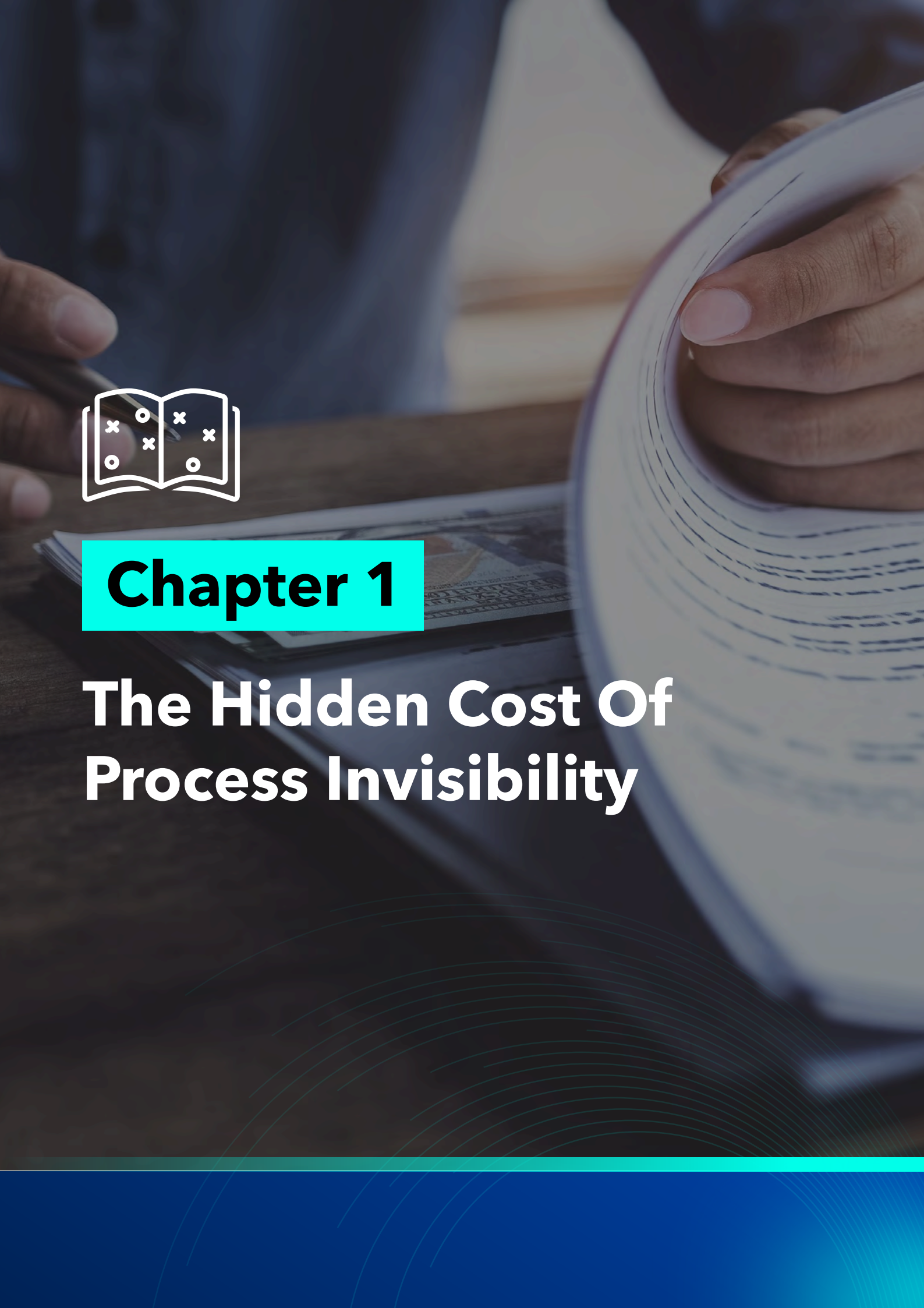


VPs of automation
who are ready to move beyond guesswork and objectively identify high-impact automation candidates

Process improvement teams
eager to ditch manual interviews and incomplete event log analysis for far more efficient workflows

VPs of digital transformation
struggling to quantify productivity losses and prove ROI on automation investments





Chapter 1

The Hidden Cost Of Process Invisibility

The Hidden Cost of Process Invisibility: The $10+ Billion Problem

Every day, across enterprises worldwide, employees perform thousands of tasks that collectively represent millions of dollars in potential automation savings. Yet most organizations remain blind to these opportunities, continuing to operate with inefficient processes that drain resources, frustrate employees, and limit competitive advantage.

Consider this: the average knowledge worker spends 20-30% of their time simply switching between applications, copying data from one system to another, and performing repetitive tasks that could be automated. In a 10,000-person organization, this represents hundreds of millions of dollars in lost productivity annually.

The challenge isn't that these processes are inherently complex—it's that they're invisible. Traditional approaches to process discovery rely on manual observation, employee interviews, and event log analysis. These methods are time-consuming, subjective, and often miss the most impactful automation opportunities hiding in plain sight.

Beyond Traditional Process Mining

Traditional process mining approaches have served organizations well for basic workflow analysis, but they fall short when it comes to discovering automation opportunities at scale. Event logs only tell part of the story – they show what happened in systems, but not what employees actually did to make it happen.

Manual observation and interviews, while valuable, are inherently limited by human perception and recall. Employees often can't articulate the inefficiencies they've adapted to, and observers can only capture a fraction of the process variations that occur across different users, times, and scenarios.

What's needed is a new approach that can capture the full spectrum of human-computer interactions, analyze them at scale, and automatically identify automation opportunities based on objective data rather than subjective assessment.

The Process Intelligence Revolution

Process intelligence represents a fundamental shift in how organizations discover and optimize their operations. By combining computer vision, artificial intelligence, and advanced analytics, process intelligence platforms can observe and analyze every click, keystroke, and screen interaction across an organization's workforce.

This technology doesn't just document processes—it discovers automation opportunities by identifying:



Repetitive patterns right for automation



Application switching inefficiencies



Data entry bottlenecks



Process variations that create waste



Compliance gaps that require standardization

The result is unprecedented visibility into actual work patterns, enabling organizations to make data-driven decisions about where to invest their automation efforts for maximum impact.

This playbook presents real-world case studies from leading enterprises across industries, documenting over $200 million in verified savings achieved through process intelligence-driven automation. You'll discover:



The Opportunity Spotting Play

Proven methodologies for identifying high-impact automation targets



The Industry Pattern Play

Sector-specific insights that reveal where automation delivers maximum value



The Fast-Track Implementation Play

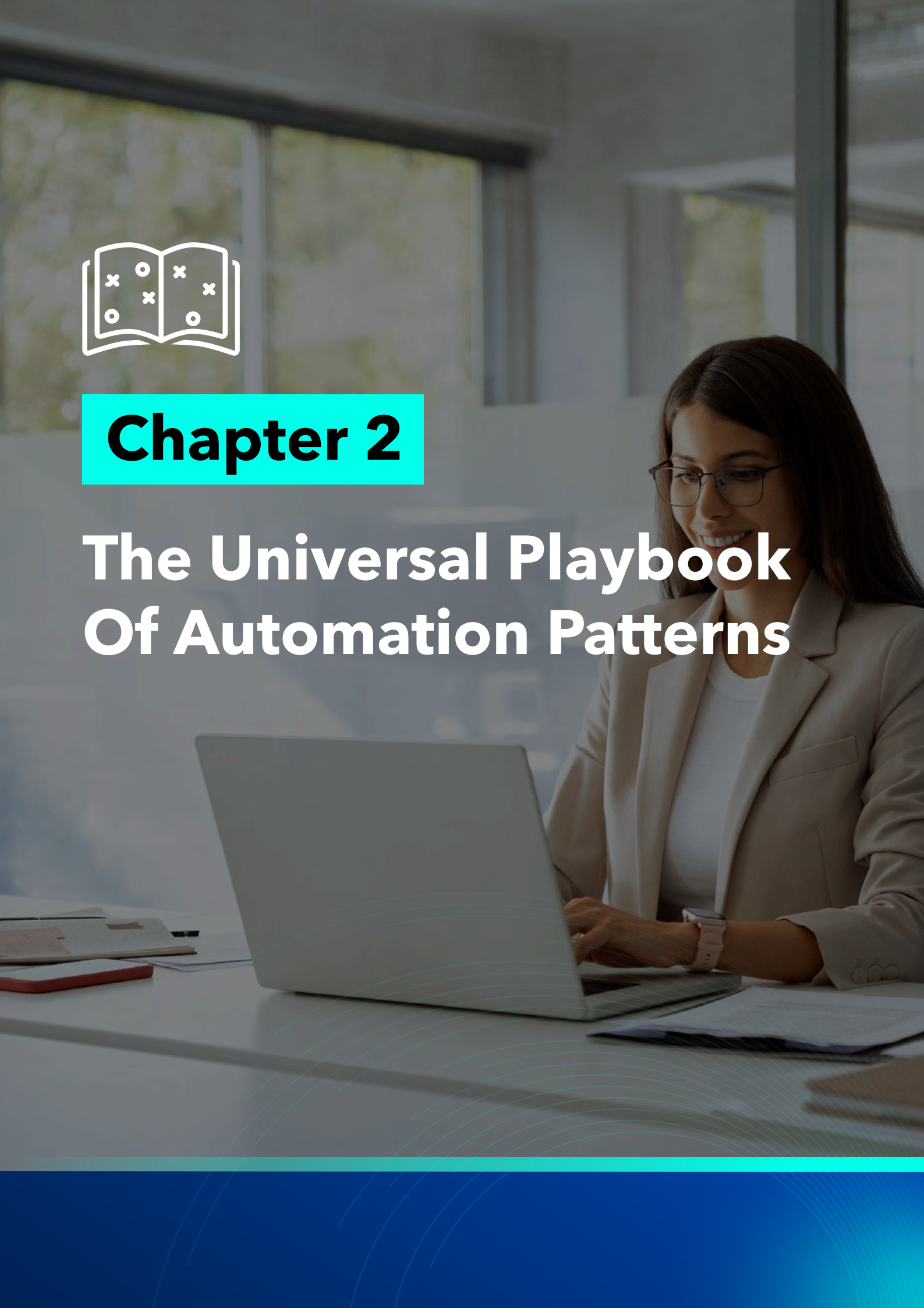
Ready-to-use frameworks that accelerate time-to-value



The Quick ROI Play

Success metrics that demonstrate returns within months, not years

Each case study includes specific savings amounts, implementation timelines, and the exact automation technologies deployed, providing you with actionable insights you can apply immediately in your own organization.



Chapter 2

The Universal Playbook Of Automation Patterns

The Universal Cross-Industry Automation Playbook

While each industry has unique characteristics and requirements, process intelligence implementations across sectors reveal consistent patterns in where automation delivers the greatest value. These universal patterns provide organizations with a playbook for identifying and prioritizing their highest-impact automation opportunities.

Execute the Universal Automation Goldmine Plays

Regardless of industry, organizations consistently discover automation opportunities in four key categories that represent the foundation of operational efficiency. Understanding these patterns enables organizations to focus their automation plays on areas with proven ROI across multiple sectors.

Deploy the Cross-Industry Success Playbook

The universal playbook reveals foundational automation plays that work across all industries - providing organizations with a proven roadmap to identify and execute their highest-impact opportunities first.

The Four Universal Automation Plays

Every successful automation implementation follows these core plays that transcend industry boundaries and deliver consistent value across diverse organizational contexts.



Play 1

Application Switching



Play 2

Documentation & Data Entry



Play 3

Workflow and Approvals



Play 4

Process Standardization

Application Switching Automation

Execute the Hidden Cost Discovery

Process intelligence consistently reveals that knowledge workers spend 20-30% of their time switching between applications, copying data from one system to another, and re-entering information across platforms. This application switching creates several types of waste:

- Time lost during transitions between systems
- Errors introduced during manual data transfer
- Cognitive fatigue from constantly changing contexts
- Decreased productivity due to workflow fragmentation

Deploy the Application Integration Plays

Sub-Play 1

Robotic Process Automation (RPA) for routine data transfers between systems

Sub-Play 2

API integration connecting previously isolated applications

Sub-Play 3

Screen scraping technology for legacy system integration

Sub-Play 4

Unified dashboards reducing the need for multiple application interfaces

Universal Playbook Results

- **$10+** million savings potential in large organizations
- **25-35%** reduction in task completion time
- **40-50%** decrease in data entry errors
- Enhanced employee satisfaction through reduced repetitive work

Cross-Industry Play Examples

Healthcare Play

Automated patient data aggregation across EMR, billing, and scheduling systems

Financial Services Play

Integrated trading platforms eliminating manual data entry

Technology Play

Unified project management reducing tool switching

Insurance Play

Connected claims systems eliminating redundant data entry

Documentation & Data Entry Automation

Execute the Documentation Discovery

Manual documentation and data entry processes consistently show the highest automation potential across all industries. Process intelligence reveals that routine documentation tasks can be automated with up to 90% time reduction while improving accuracy and compliance.

Target Common Documentation Bottlenecks

- Call notes and interaction summaries
- Compliance documentation and filing
- Report generation and formatting
- Form processing & data extraction

Deploy the Documentation Automation Plays

Sub-Play 1

Intelligent Document Processing (IDP) for form and document automation

Sub-Play 2

Natural Language Processing (NLP) for automated note generation

Sub-Play 3

Optical Character Recognition (OCR) for document digitization

Sub-Play 4

Template-based reporting for standardized document creation

Universal Playbook Results

- **80-90%** reduction in documentation time
- Immediate ROI through reduced manual effort
- Improved accuracy and consistency
- Enhanced compliance and audit capabilities

Cross-Industry Play Applications

Healthcare Play

Automated call documentation and patient record updates

Financial Services Play

Automated compliance reporting and client documentation

Technology Play

Intelligent claims document processing

Insurance Play

Automated project documentation and status reporting

Workflow & Approvals Automation

Execute the Approvals Bottleneck Discovery

Complex approval processes and manual routing decisions consistently create bottlenecks across industries. These processes often involve multiple stakeholders, approval levels, and decision points that can be streamlined through intelligent automation.

Target Common Approval Bottlenecks

- Multi-level approval chains with manual handoffs
- Routing decisions based on business rules
- Status tracking and notification processes
- Exception handling and escalation management

Deploy the Workflow Automation Plays

Sub-Play 1

Workflow automation platforms for complex approval processes

Sub-Play 2

Business rule engines for intelligent routing decisions

Sub-Play 3

Automated notification systems for status updates and escalations

Sub-Play 4

Exception-based processing focusing human attention on complex cases

Universal Playbook Results

- **40-50%** reduction in processing time
- Elimination of manual handoff delays
- Improved visibility and tracking
- Enhanced compliance through consistent process execution

Cross-Industry Play Applications

Healthcare Play

Intelligent patient referral routing

Financial Services Play

Automated hand-offs during loan approval workflows

Technology Play

Streamlined change management approvals

Insurance Play

Automated claims approval processes

Play 4

Process Standardization Automation

Execute the Standardization Discovery

Process standardization consistently unlocks the greatest automation potential across organizations. When processes are standardized, automation solutions can be developed once & applied broadly, creating scale economies & consistent performance improvements.

Target Standardization Opportunities

- Eliminating process variations across teams and regions
- Implementing best practices consistently
- Creating standard operating procedures (SOPs)
- Establishing consistent data formats and interfaces

Deploy the Standardization Automation Benefits

- Reduced development and maintenance costs
- Consistent performance across the organization
- Simplified training and change management
- Enhanced scalability and flexibility

Universal Playbook Results

- **30-45%** efficiency gains through consistent workflows
- Reduced complexity and maintenance overhead
- Improved quality and compliance
- Accelerated automation deployment

Cross-Industry Implementation Patterns

Global Organizations Play

Standardizing regional variations for scale

Multi-Location Companies Play

Implementing consistent processes across sites

Merged Organizations Play

Harmonizing different approaches post-acquisition

Growing Companies Play

Scaling successful pilot programs enterprise-wide

The Process Intelligence Discovery Playbook

Execute the Real-Time Discovery Play vs. Traditional Approaches

Traditional process analysis methods require months of manual observation, interviews, and documentation to identify automation opportunities. The process intelligence playbook accelerates this discovery from months to weeks while providing more comprehensive and objective insights.

Overcome Traditional Analysis Limitations



Manual observation limited by human perception and availability



Employee interviews subject to recall bias and subjective interpretation



Event log analysis missing human interaction details



Point-in-time snapshots missing process variations

Deploy the Process Intelligence Advantage Plays

Play 1

Continuous monitoring capturing all process variations

Play 2

Objective data eliminating subjective bias

Play 3

Comprehensive coverage across all users and scenarios

Play 4

Real-time insights enabling rapid response to changes

Execute the Unbiased Data Discovery Play

Human observers often miss automation opportunities because they adapt to inefficiencies or lack visibility into alternative approaches. Process intelligence provides objective data that reveals opportunities invisible to traditional analysis methods.

The Process Intelligence Discovery Playbook (Cont'd)

Target Hidden Opportunity Categories

- Process variations unknown to management
- Inefficiencies that employees have adapted to
- Best practices used by some but not others
- Automation opportunities in unexpected areas

Deploy the Continuous Monitoring Play

Unlike traditional process analysis that provides point-in-time snapshots, process intelligence enables continuous monitoring that identifies new automation opportunities as processes evolve and organizations change.

Execute Continuous Value Creation

- Identification of new bottlenecks as processes change
- Recognition of successful automation patterns for broader application
- Early detection of process degradation or drift
- Optimization of existing automation solutions





Chapter 3

Your Automation Discovery Roadmap

Your Automation Discovery Roadmap

The case studies and patterns presented throughout this playbook represent more than theoretical possibilities—they demonstrate proven plays that organizations across industries are using to unlock millions of dollars in operational savings while improving employee satisfaction and customer experience.

Execute the Insight to Implementation Play

The journey from process visibility to automated operations follows a predictable playbook that organizations can navigate successfully with the right approach and commitment. The key is understanding that automation success depends not just on technology implementation, but on organizational readiness, change management, and continuous improvement plays.

Deploy the Complete Automation Success Playbook

Transform insights into results by executing the proven roadmap that takes organizations from discovery through implementation to sustained operational excellence.



Key Takeaways: The $1+ Billion Proof

The combined case studies presented in this playbook document over $1 billion in savings potential across organizations of various sizes and industries. These results demonstrate several critical playbook insights:

Execute the Scale of Opportunity Play

Every organization, regardless of industry or size, contains significant automation potential. The question is not whether opportunities exist, but whether organizations will discover and capture them before competitors execute their own automation playbooks.

Deploy the Speed to Value Play

Organizations implementing process intelligence-driven automation consistently achieve ROI within 6-18 months, with many seeing benefits within weeks of implementation. This rapid return enables self-funding automation programs that expand organically through successive playbook executions.

Master the Universal Application Play

The automation patterns identified through process intelligence apply across industries, enabling organizations to learn from successful plays in other sectors while adapting approaches to their specific requirements.

Execute the Competitive Advantage Play

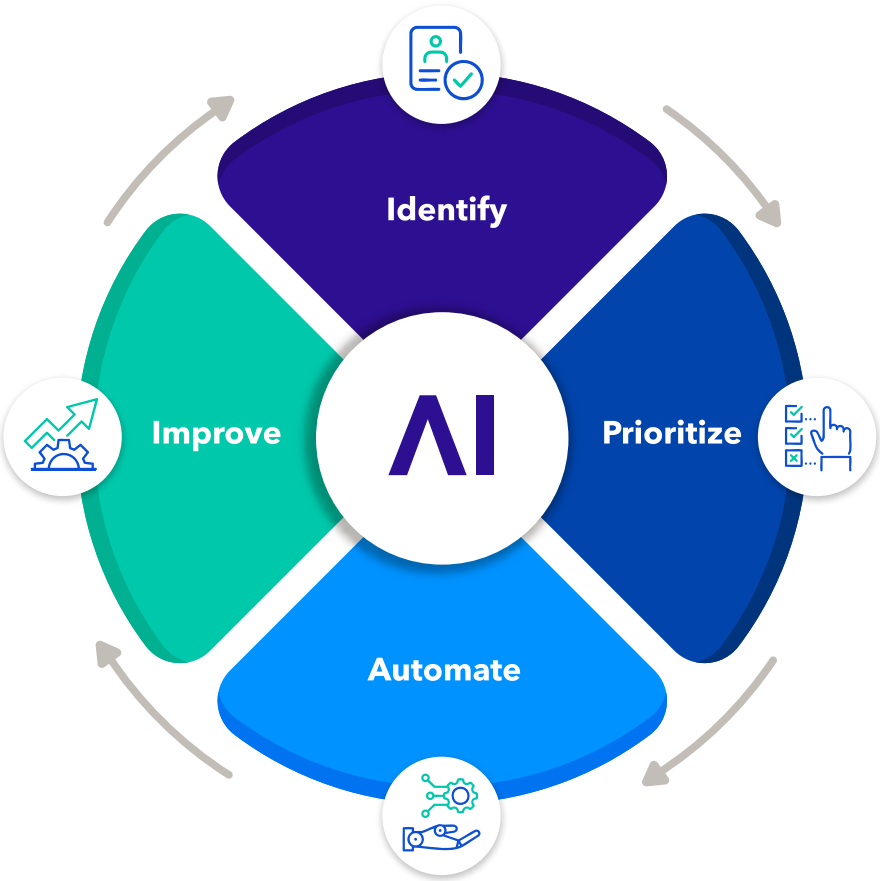
Early adopters of process intelligence are discovering 10X more automation opportunities than organizations relying on traditional analysis methods, creating sustainable competitive advantages through operational excellence playbook mastery.

The Playbook Success Formula

These billion-dollar results prove that systematic execution of the process intelligence playbook delivers measurable, sustainable value across any organization ready to commit to the plays.

The Process Intelligence Implementation Framework

Successful automation programs follow a structured approach that ensures maximum value creation while minimizing implementation risk. This framework provides organizations with a roadmap for systematic automation discovery and deployment.



Think of automation as an **evolution, not a revolution**—a series of intelligent iterations rather than a one-time initiative. The four-step framework is your competitive playbook, transforming automation efforts from cost centers into profit-generating machines.

Phase 1: Creating a Baseline

What Are Our Processes?

The foundation of successful automation is comprehensive understanding of existing processes. Process intelligence enables organizations to establish this baseline quickly and objectively.

Key Activities

- Deploy process intelligence across target business functions
- Capture comprehensive process data for analysis
- Identify process variations and performance metrics
- Establish current state baselines for improvement measurement

Expected Outcomes

- Complete visibility into actual work patterns
- Objective process performance metrics
- Identification of high-variability processes requiring attention
- Understanding of current automation readiness



Phase 2: Unlocking Optimization

What Are Our People Doing and How Can They Do It Better?

With baseline understanding established, organizations can identify specific optimization opportunities and prioritize them based on impact and feasibility.

Key Activities

- Analyze process data to identify automation opportunities
- Quantify potential savings and implementation requirements
- Prioritize opportunities based on ROI and strategic alignment
- Develop detailed business cases for high-impact initiatives

Expected Outcomes

- Prioritized portfolio of automation opportunities
- Detailed ROI projections and implementation timelines
- Stakeholder alignment on automation priorities
- Resource requirements and implementation planning



Phase 3: Maximizing Digitization

What Technology Can We Deploy to Maximize Impact?

The final phase focuses on implementing automation solutions and establishing continuous improvement processes to maximize long-term value.

Key Activities

- Deploy automation solutions for highest-priority opportunities
- Establish change management processes for user adoption
- Implement monitoring and optimization capabilities
- Scale successful solutions across the organization

Expected Outcomes

- Operational automation solutions delivering measurable value
- Established automation capabilities and competencies
- Continuous improvement processes for ongoing optimization
- Organizational culture supportive of automation adoption



Success Metrics That Matter: Your Playbook Scorecard

Organizations implementing process intelligence-driven automation consistently achieve measurable improvements across key performance indicators. These metrics provide benchmarks for playbook success and enable continuous optimization.

Execute the Process Efficiency Scorecard

- 30-50% reduction in process variability across standardized workflows
- 20-45% improvement in processing times for automated processes
- 25-40% reduction in manual handoffs and approval delays
- 35-60% decrease in rework and error correction activities

Deploy the Financial Impact Scorecard

- $10+ million annual savings potential for large enterprises
- ROI achievement within 6-18 months of implementation
- 15-25% reduction in operational costs for automated processes
- 200-500% return on automation investment over 3-year period

Master the Employee Experience Scorecard

- 30-40% reduction in time spent on repetitive tasks
- 25-35% increase in time available for value-added activities
- Improved job satisfaction through elimination of mundane work
- Enhanced skill development through focus on higher-value tasks

Execute the Customer Experience Scorecard

- 40-60% improvement in service response times
- 25-30% increase in customer satisfaction scores
- 50-70% reduction in service errors and complaints
- Enhanced service consistency across all touchpoints



Chapter 4

The Competitive Imperative Playbook

The Competitive Imperative Playbook

Mission Briefing

Early adopters of process intelligence-driven automation are gaining decisive competitive advantages. Their success creates both opportunity and threat for other organizations.

First-Mover Advantages

Organizations implementing process intelligence solutions secure four critical advantages:



Operational Excellence

Superior efficiency creating cost advantages



Customer Experience

Faster service improves retention



Talent Acquisition

Better work experiences attracting top talent



Innovation Capacity

Smarter resourcing enables strategic investment

Tactical Edge

Process intelligence finds automation opportunities **10X faster** than manual analysis.

Cost of Delay

Organizations that postpone automation face competitors achieving:

- Lower operational costs enabling competitive pricing
- Superior service quality improving market position
- Greater flexibility enabling faster market response
- Enhanced innovation through resource reallocation

The gap widens daily. Leaders execute while others evaluate.

Implementation Recommendations

Based on the success patterns observed across industries, organizations should consider the following recommendations for maximizing their automation success:

Start with High-Impact, Low-Risk Opportunities

Begin automation programs with processes that have clear ROI potential and minimal implementation complexity. Success with initial projects builds organizational confidence and expertise for more complex initiatives.

Focus on Employee Experience

Automation succeeds when employees understand the benefits and are actively engaged in the transformation. Emphasize how automation eliminates mundane tasks and enables focus on more interesting, valuable work.

Establish Centers of Excellence

Create dedicated teams responsible for automation discovery, implementation, and optimization. These centers of excellence accelerate deployment and ensure consistent approaches across the organization.

Invest in Change Management

Technology implementation is only successful with effective change management. Invest in training, communication, and support systems that ensure user adoption and sustained benefits.

Plan for Scale

Design automation solutions with scalability in mind. Successful pilot programs should be architected to support organization-wide deployment without significant rework.

Measure and Optimize ontinuously

Establish monitoring and optimization processes that ensure automation solutions continue delivering value over time. Regular assessment enables continuous improvement and identification of new opportunities.

Common Implementation Pitfalls

Organizations can avoid common pitfalls by learning from the experiences of successful implementers:

Pitfall 1

Analysis Paralysis

Some organizations spend excessive time analyzing processes without moving to implementation. While thorough analysis is important, the goal is rapid identification of high-impact opportunities and quick implementation wins.

Pitfall 2

Technology-First Approach

Focusing on technology selection before understanding process requirements often leads to suboptimal solutions. Process intelligence should drive technology selection, not the reverse.

Pitfall 3

Insufficient Change Management

Even the best automation solutions fail without proper change management. Employee adoption is critical for success and requires dedicated attention and resources.

Pitfall 4

Narrow Focus

Organizations that focus on single processes or departments miss opportunities for broader impact. Process intelligence enables enterprise-wide optimization that delivers greater value than isolated improvements.

Pitfall 5

Static Implementation

Treating automation as a one-time project rather than an ongoing capability limits long-term value. Successful organizations establish continuous improvement processes that identify and capture new opportunities over time.

Your Automation Discovery Journey

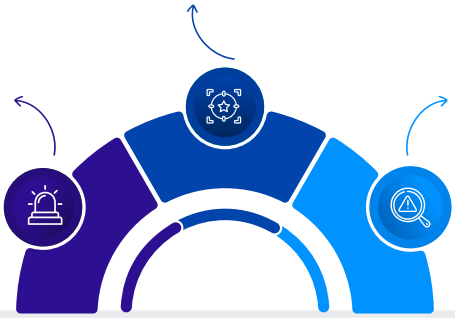
The evidence presented throughout this book demonstrates that significant automation opportunities exist within every organization. The case studies, patterns, and frameworks provide a clear roadmap for discovering and capturing these opportunities.

Opportunity

Early adopters are achieving significant competitive advantages through operational excellence

The Urgency of Now

Market dynamics are creating both opportunity and risk for organizations considering automation initiatives



Risk

Delayed implementation allows competitors to gain sustainable advantages that become difficult to overcome

Your Next Steps

Assess Your Current State

Evaluate your organization's process visibility and automation maturity

Identify Pilot Opportunities

Select high-impact processes for initial process intelligence deployment

Build Internal Capabilities

Develop the skills and competencies needed for successful automation programs

Establish Success Metrics

Define measurement frameworks that demonstrate value and guide optimization

Plan for Scale

Design approaches that can expand from pilot success to enterprise-wide transformation

The Hidden Value Question

Your organization's processes contain millions of dollars in hidden automation value. The data from hundreds of implementations across industries proves this opportunity exists universally.

The critical question facing your organization is not whether these opportunities exist—it's whether you'll discover and capture them before your competitors do.

Starting Your Journey

Process intelligence-driven automation represents one of the most significant opportunities for operational improvement available to enterprises today. The organizations featured in this book have demonstrated that with the right approach, technology, and commitment, dramatic improvements in efficiency, quality, and competitiveness are achievable.

The journey begins with a single step: gaining visibility into your actual processes. From that foundation, the path to automated operations and competitive advantage becomes clear.

Your processes are waiting to be optimized. Your employees are ready to focus on higher-value work. Your customers are expecting better, faster service. Your competitors are already beginning their automation journeys.

Will you be a technology leader or a follower?



Unleash The Power Of Automation

Level up how your company does work to drive transformation.

About Skan AI & Process Intelligence

Process intelligence represents the next evolution in operational excellence, combining computer vision, artificial intelligence, and advanced analytics to provide unprecedented visibility into how work actually gets done. By observing and analyzing human-computer interactions at scale, Skan AI reveals automation opportunities that traditional methods miss while accelerating implementation timelines from months to weeks.

The future of enterprise operations is automated, intelligent, and continuously optimized. Process intelligence is the key to unlocking that future for your organization.



Learn more about how Skan AI drives transformation with automation

Automation & AI Trends in Insurance

AI-Powered Process Revolution

The Automation Revolution: $10.8M+ Savings



Skan AI



Thank You!

Learn how Skan AI supports
Automation Discovery operations.

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