

# How to measure and continuously improve your Winshuttle Workflow Processes

Israel Rosales | Winshuttle

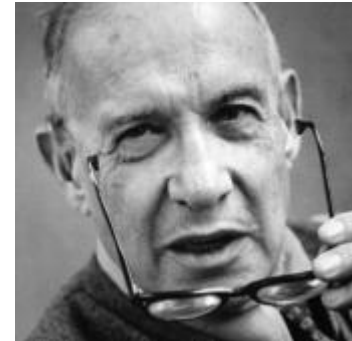


WINSHUTTLE  
USER  
GROUP CONFERENCE

# Small piece of wisdom

“If you can’t measure it, you can’t improve it”

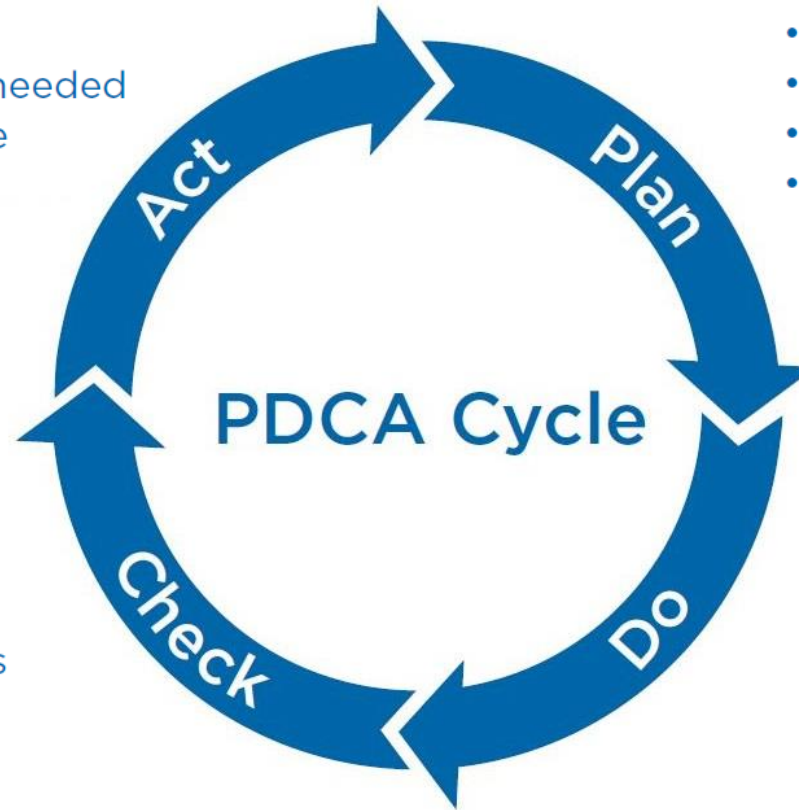
Peter Drucker



# PDCA – Continuous improvements

Measuring is one of the pillars of the PDCA (Plan-Do-Check-Act) cycle:

- Fix minor errors
- Small corrections as needed
- Prepare for next cycle



- Catalogue data problems
- Prioritize
- Define success metrics
- Capture baseline metrics

- Measure impact
- Check improvements

- Implement solutions
- Rapid development
- No “big bangs”



# Measuring a Winshuttle Workflow process

Winshuttle is already storing the details from each execution:



MMwBOMandRouting 1/12/2016 6:32:17 AM

Winshuttle	
W	Winshuttle History
W	Copy

Name	Created Date	Completion Date				
MMwBOMandRouting - MMwBOMandRouting 1/12/2016 6:32:17 AM	1/12/2016 6:32:19 AM	1/14/2016 2:37:57 PM				
Assignments						
Assignee	Task Name	Assigned Date	Review Date	Completion Date	Status	
Bill Wiseman	MD Approval & update SAP	1/14/2016 2:36:56 PM	1/14/2016 2:37:07 PM	1/14/2016 2:37:56 PM	Approved	
Bill Wiseman	Add Costing Data	1/12/2016 6:37:09 AM	1/12/2016 6:37:22 AM	1/14/2016 2:36:56 PM	Completed	
Bill Wiseman	Supply Chain Approval	1/12/2016 6:36:23 AM	1/12/2016 6:36:39 AM	1/12/2016 6:37:09 AM	Approved	
Bill Wiseman	Tech Approval	1/12/2016 6:32:20 AM	1/12/2016 6:33:15 AM	1/12/2016 6:36:23 AM	Approved	
Bill Wiseman	Start Material Bom Routing	1/12/2016 6:32:19 AM		1/12/2016 6:32:19 AM	Completed	

What if we could leverage this for performance reporting???



Some good news...



# Beta initiatives for process performance reporting

Beta - API (Application Programming Interface) for this info:



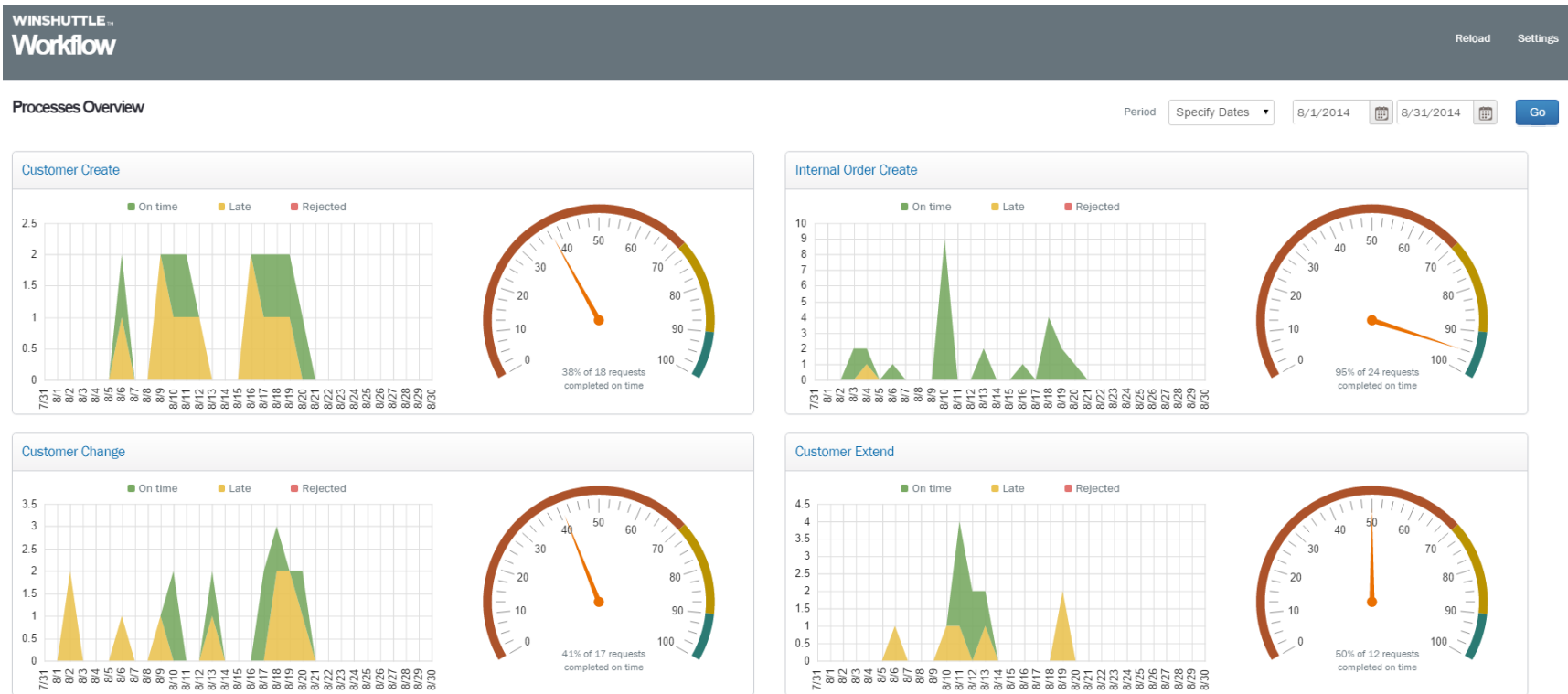
Report development with third party tools (Tableau, Qlikview, etc.)

Some more good news...



# Beta initiatives for process performance reporting

## Beta - Out of the box performance reporting:



We call these two Beta prototypes “Winshuttle Dashboards”



# Winshuttle Dashboard roadmap

## Next milestones for Winshuttle Dashboard:

- Complete API Beta and product release
- New generation of Out of the box reporting to be released as Beta

## If you are interested in the Beta, please contact:

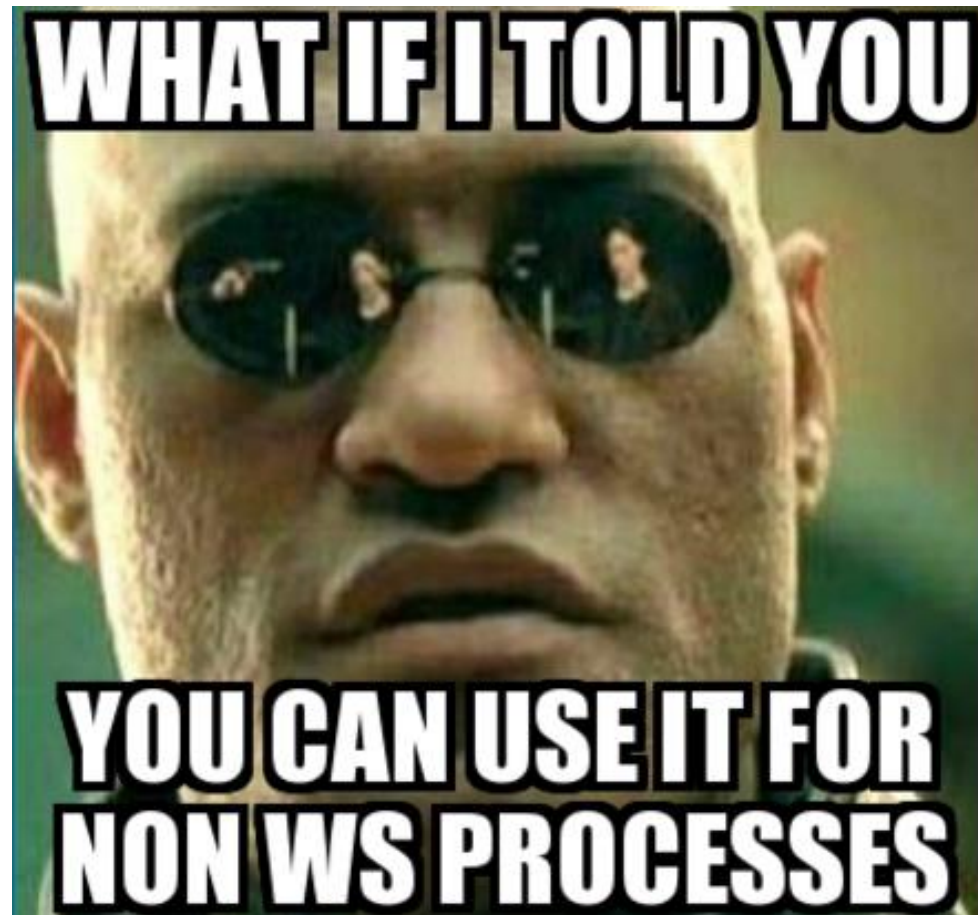
- Jim Barker - [Jim.Barker@winshuttle.com](mailto:Jim.Barker@winshuttle.com)  
Director of Product Management - Foundation



# How can you leverage this?

As measuring tool in the PDCA for existing Winshuttle workflows

Only this?



# The power of baseline metrics

What if we could measure a process before implementing it in Winshuttle?

We could change the process before implementing  
in Winshuttle...

and implement an improved version the first time...

getting a better solution in the first iteration!!!



# Baseline metrics example

The solution is a very quick and rapid Winshuttle dummy solution:

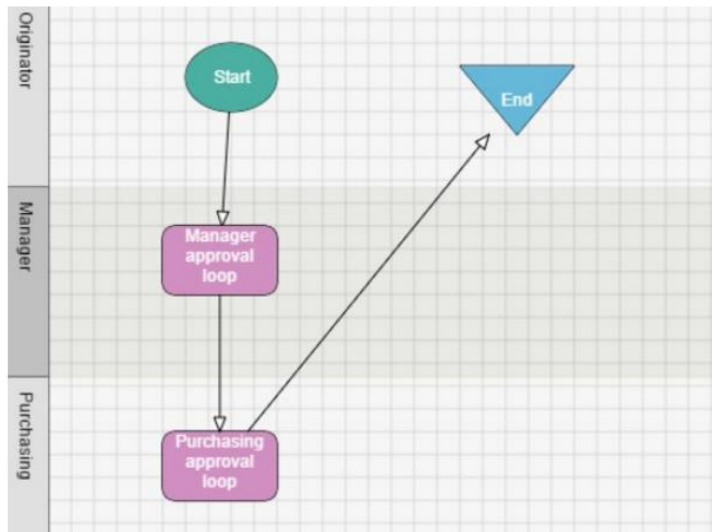
- A Winshuttle workflow only with current steps of the SAP process, without any real integration with SAP
- Only one or two dummy fields so users can add to the form the object they are creating or modifying in SAP
- Users will execute the process in SAP based on Winshuttle notifications
- With this information, we will have the activity logs that Winshuttle Workflow Dashboard needs to generate the process performance report



# Baseline metrics example – PO creation

A Purchase Order creation process with the next steps:

- Originator that creates the PO in SAP
- Manager that approves (first level) in SAP
- Purchasing that approves (second level ) in SAP



Purchase Order Creation

PO SAP number

# Baseline metrics example – P0 creation

Time and effort to create this is less than 15 minutes!

These 15 minutes will allow us to:

- Capture baseline metrics, do this for 4-6 weeks.
- Analyse the data to identify bottlenecks and inefficiencies.
- Generate an initial version of the Winshuttle workflow that covers this

More value and better ROI for almost the same effort as developing without capturing the baseline metrics.



# Available resources

Winshuttle Blogpost about the concept showed today:

<http://www.winshuttle.com/blog/continuously-measure-improve-winshuttle-workflow-processes/>

**WINSHUTTLE**

Lean Data Management Solutions

## How to Continuously Measure and Improve Your Winshuttle Workflow Processes

By Israel Rosales on October 19, 2015

There is a golden rule in process improvements:

“You can only improve a process if you can measure it”

Without measuring before and after implementing a change in the process, we cannot quantify the impact of the change. This is one of the pillars of the PDCA (Plan-Do-Check-Act) cycle:



# Available resources

## Leverage Winshuttle blog!!!

<http://www.winshuttle.com/blog/>



**WINSHUTTLE** Lean Data Management Solu

### Winshuttle blog

#### Finance Perceptions: What Your Kids Think You Do vs. What Your Boss Thinks You Do

By Clinton Jones on January 13, 2016

What your kids think you do if you're in finance, chances are you spend a fair amount of your evening working, when you should be relaxing and engaging in family time – or at least that's the view you want your boss to have! Your role and finance perceptions tend to vary greatly, depending on who's asking. On a finance professionals social board, I recently saw the question "is it better to be a small fish in a big pond, or a big fish in a small pond?" I think this dovetails nicely into the perspective around how much time... [Read more »](#)



#### Finance VLOG Series Tip #2: Automation

By Clinton Jones on January 12, 2016

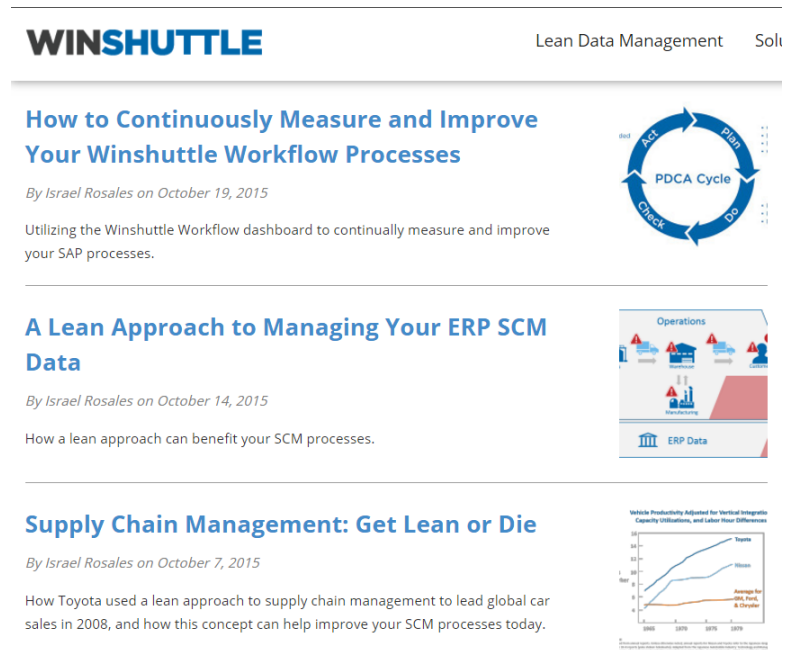
In this VLOG series, learn how to improve your finance operations efficiency. In hack 2 of 5, find out utilizing Winshuttle for process automation can free up time for more value added tasks.



#### VLOG Series: 5 Tips to Improve Finance Operations Efficiency

By Clinton Jones on January 7, 2016

In this VLOG series, learn how to improve your finance operations efficiency. In VLOG #1, find out how validation rules can enhance your transaction processing

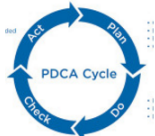


**WINSHUTTLE** Lean Data Management Solu

#### How to Continuously Measure and Improve Your Winshuttle Workflow Processes

By Israel Rosales on October 19, 2015


Utilizing the Winshuttle Workflow dashboard to continually measure and improve your SAP processes.



#### A Lean Approach to Managing Your ERP SCM Data

By Israel Rosales on October 14, 2015


How a lean approach can benefit your SCM processes.



#### Supply Chain Management: Get Lean or Die

By Israel Rosales on October 7, 2015

How Toyota used a lean approach to supply chain management to lead global car sales in 2008, and how this concept can help improve your SCM processes today.



# Other MD training during the WUG:

## Friday:

- 11:45 – 12:30 Updating Multiple Units of Measure  
– Excel How-To
- 2:45 – 3:30 Application Data Management versus  
Master Data Management



# Questions?

