



## VisionWaves Intelligent Performance and Quality Management System

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**Senior Consultant**



# VisionWaves

At VisionWaves we are passionate about business improvement. In everything we do, we believe that the engagement of people is key to running a successful business.

That is why our product:

- ✓ connects people and strategy in easy to use cockpits.
- ✓ helps managers to get end-to-end overview of operations, revenues and costs.
- ✓ prioritizes daily actions to improve processes and performance, reduce cost and minimize risk.



With the **Connected Management Cockpits** we set The New Standard for Management.

We combine business intelligence, process and performance management, risk and compliance in single cockpits. Because to the end user it is all relevant in combination. That is where we are different.



# Business drivers for Performance and Quality Management

- Improve quality and effectiveness of client service delivery
- Consolidate systems to improve operational efficiency for increased customer satisfaction
- Introduce transparency and reporting linked to strategic goals
- Achieve seamless connectivity across the value chain
- Construct a lower, more flexible, scalable cost base



# Single platform for total management

## Strategic Direction



## Connected Management

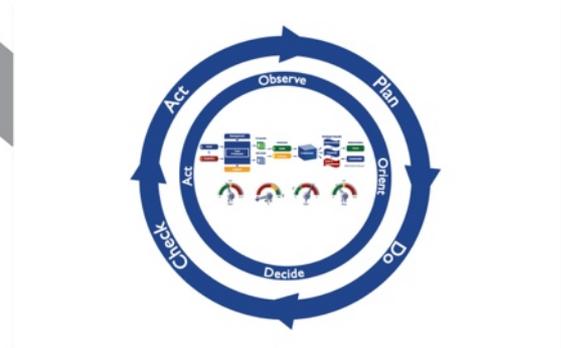
**Landscapes**

- Organization
- Processes
- Systems

**Frameworks**

- Performance
- Finance
- GRC

## Integrated Operation



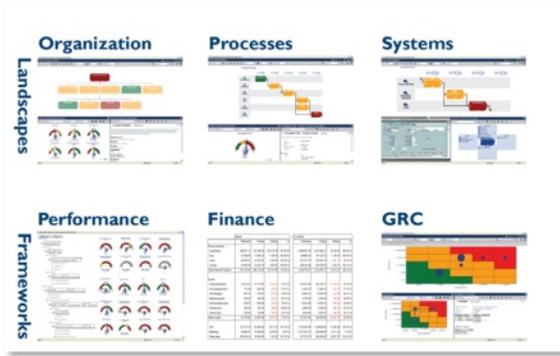
## Sustained Improvement

# Single platform for total management

## Strategic Direction



## Connected Management



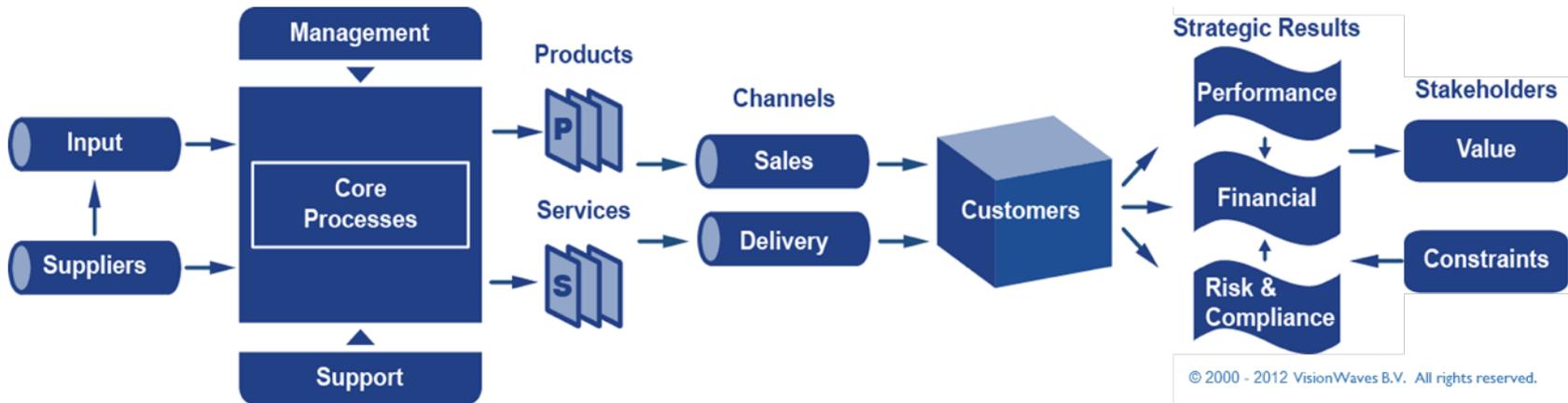
## Integrated Operation



## Sustained Improvement



# Your value chain sets the strategic direction



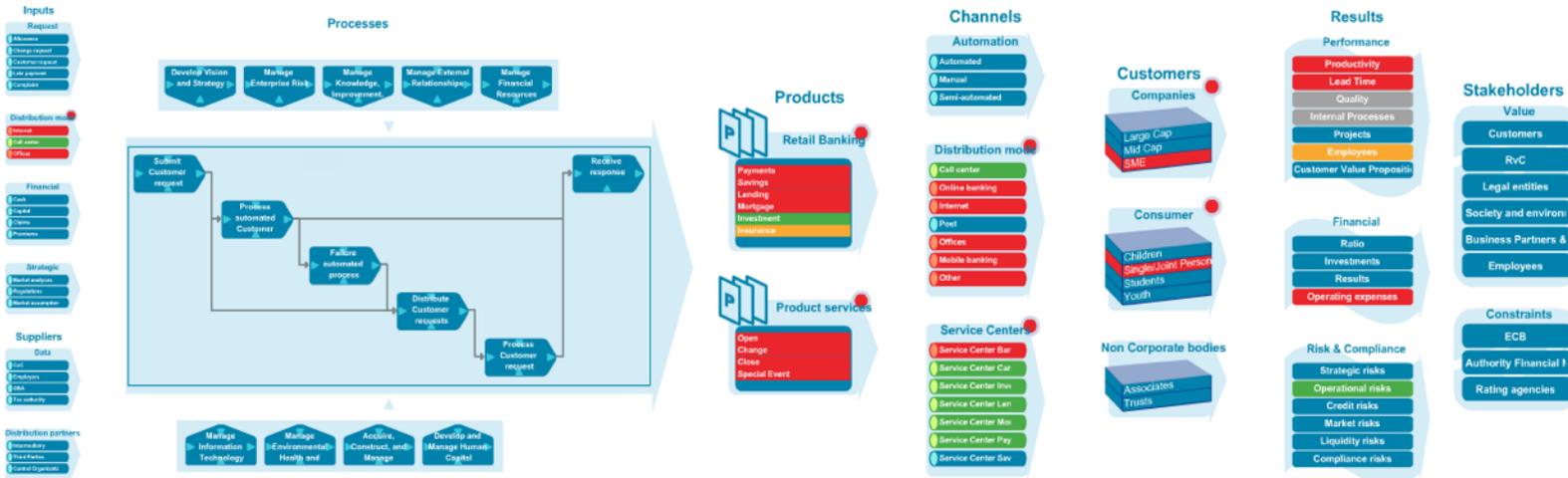
- ‘How’
- Cause
- Strategic business context
- Visualization
- Ref Porter

- ‘What’
- Strategic results
- Balanced perspectives
- Ref Kaplan

- ‘Why’
- Effect
- Stakeholders

The value chain is composed to capture the strategic direction. Business dimensions such as processes, performance, risk & compliance and projects are integrated and managed from here. It is the blue print of our connected management cockpits

# Align priorities for all stakeholders



- Better performance and operational effectiveness

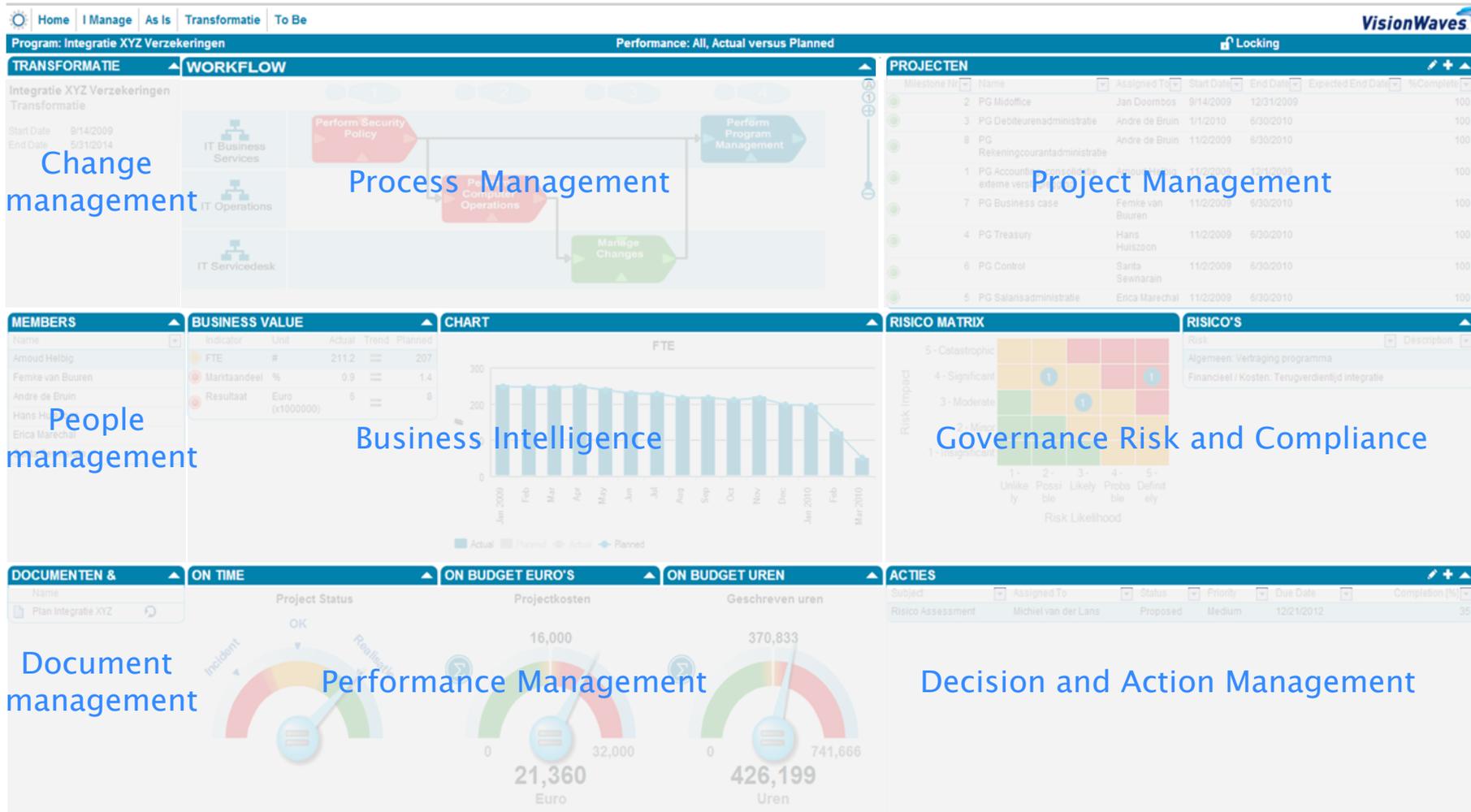
- Better focus

- Better conformance

# Role Based Cockpits – What You Need to Do your Job



# Example integrated role based cockpit



Change management

Process Management

Project Management

People management

Business Intelligence

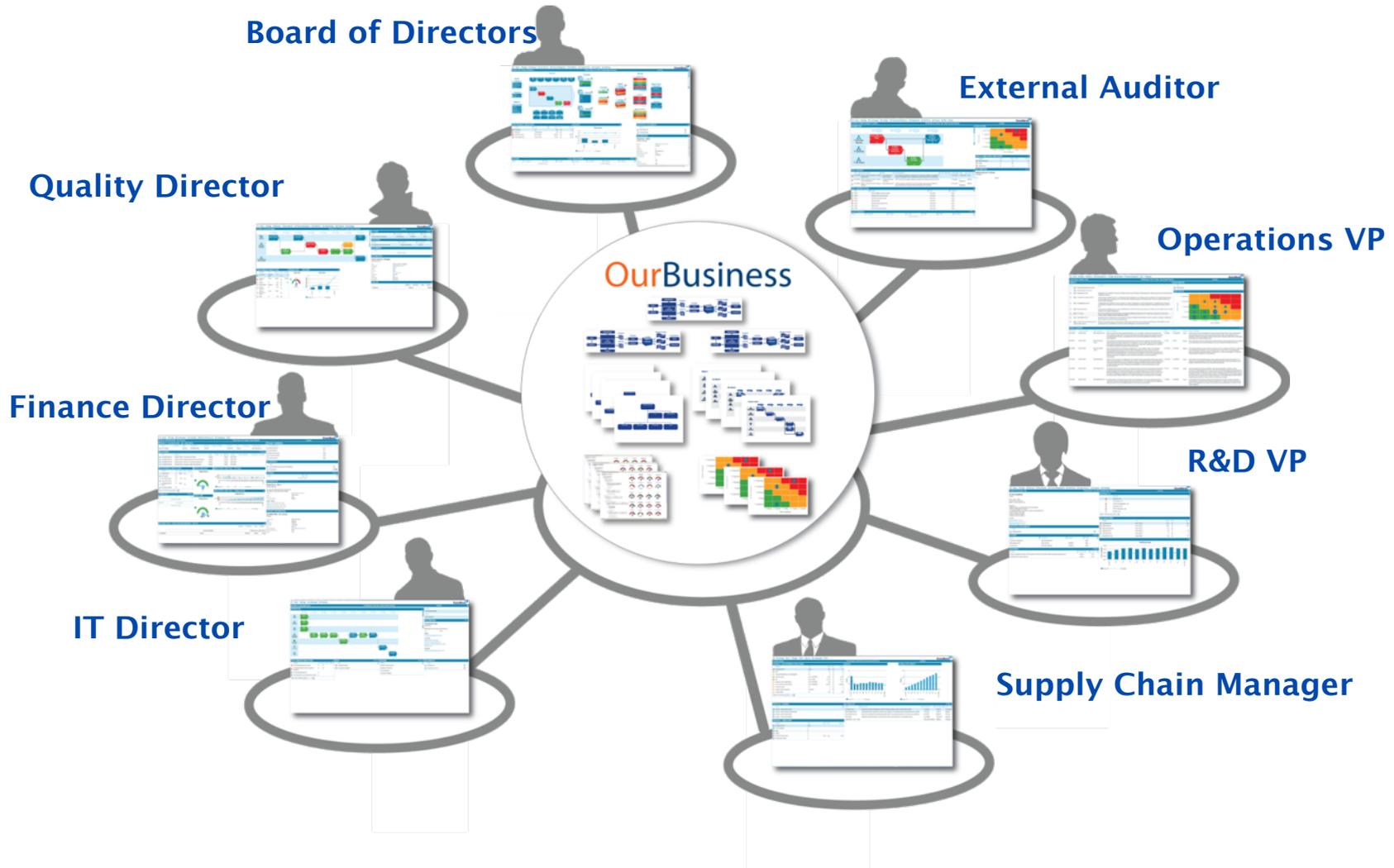
Governance Risk and Compliance

Document management

Performance Management

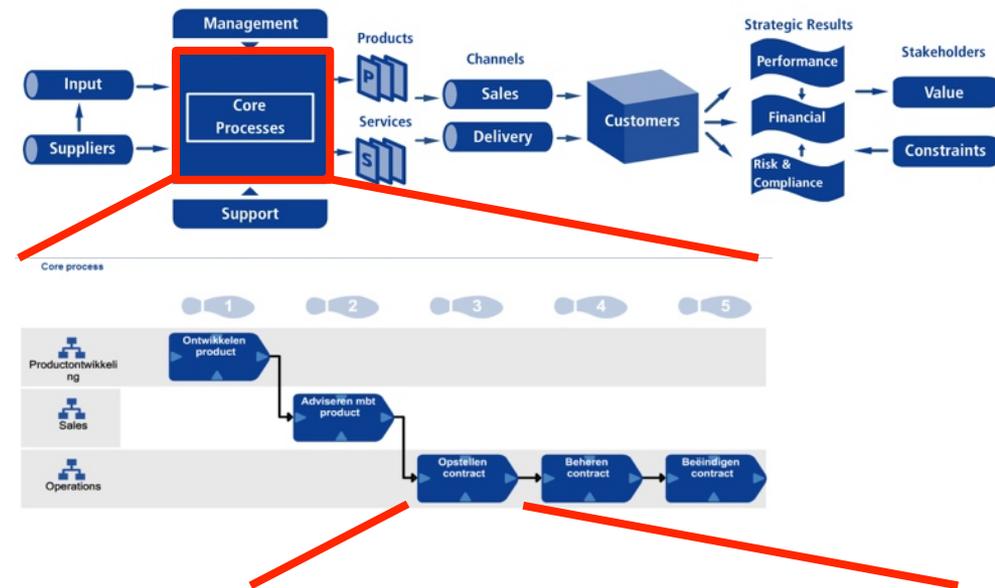
Decision and Action Management

# Cockpits give insight and connects everyone to a common goal



# Dynamic process management across the organization

- Gives you an overall picture of your processes: end to end
- Helps you identify where the waste is in your processes
- Makes it easy to implement improvements in your processes
- Policies and governance set across organization
- Processes and controls support business needs and regulatory mandate



# Visual controls lead to quicker response times

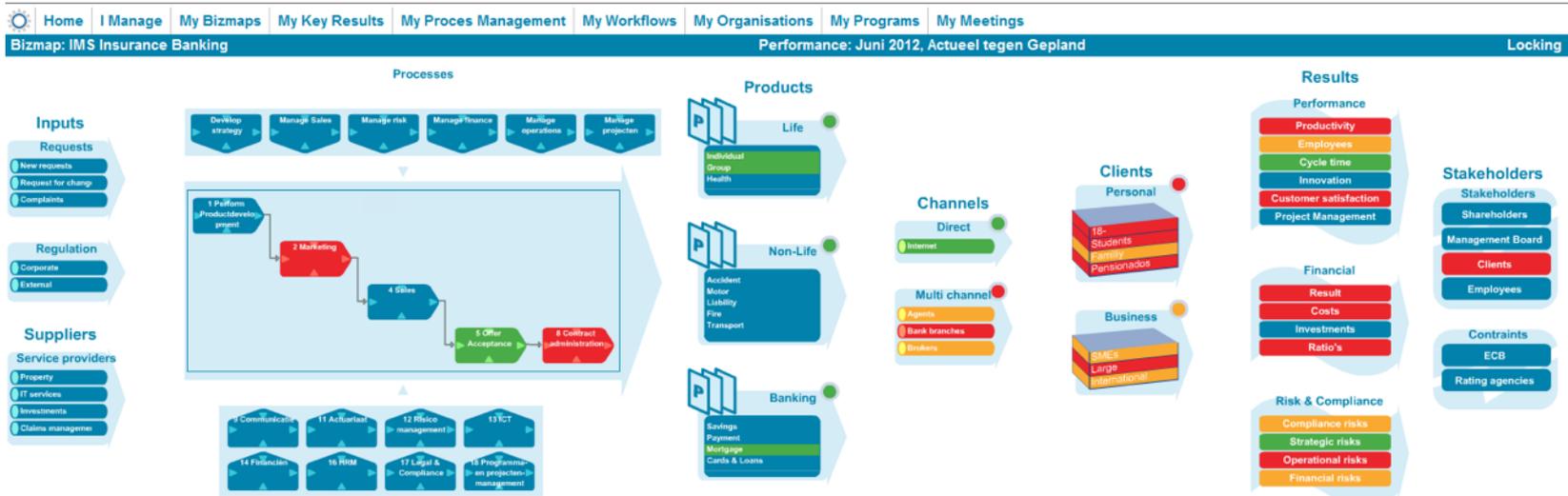
- Users are connected to a single point of truth
- Makes the control and management of your processes easier
- Quickly see variances
- Respond faster to problems
- Provides common understanding for comparing performance to targets
- Existing IT infrastructure is leveraged as input



# At a glance metrics improve factual decision making



# End-to-end visibility on areas of exposure

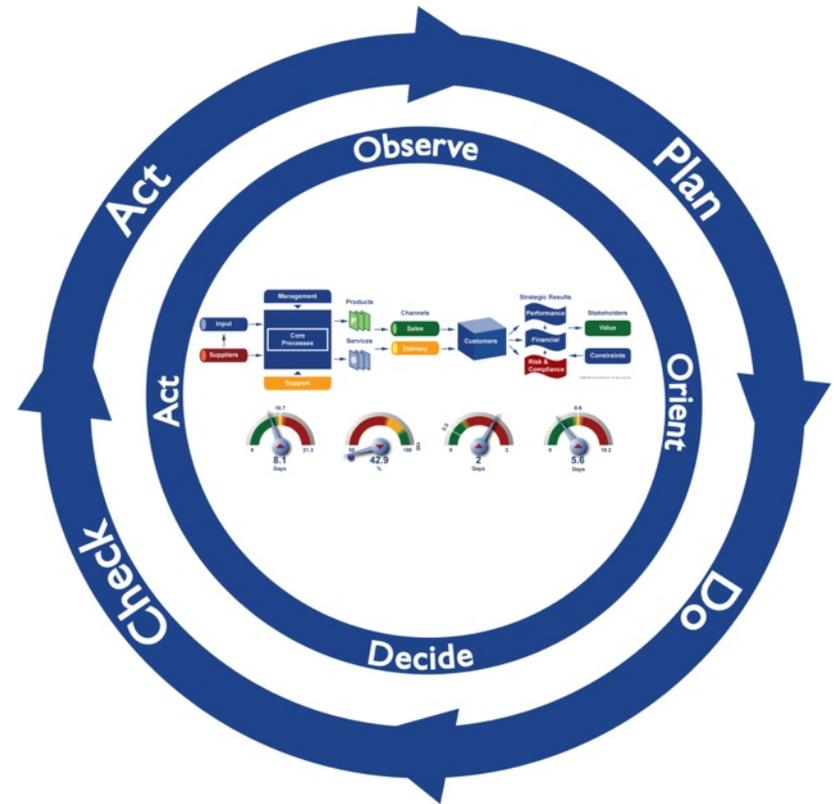


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- Strategy and quality management linked
- Consistent approach to quality across company
- Clear visibility of where to focus the audit program
- Cost-effective and transparent approach to regulatory compliance

# Achieve sustained performance improvements

- Links strategic objectives to operational execution
- Shows areas for improvement and practical ways to achieve them
- Increased change management transparency
- Improved business responsiveness
- Supports all ISO 9000 management principles



# Supporting all key quality management principles

Customer focus



Leadership



Involvement of people



Process approach



Systems approach to management



Continual improvement



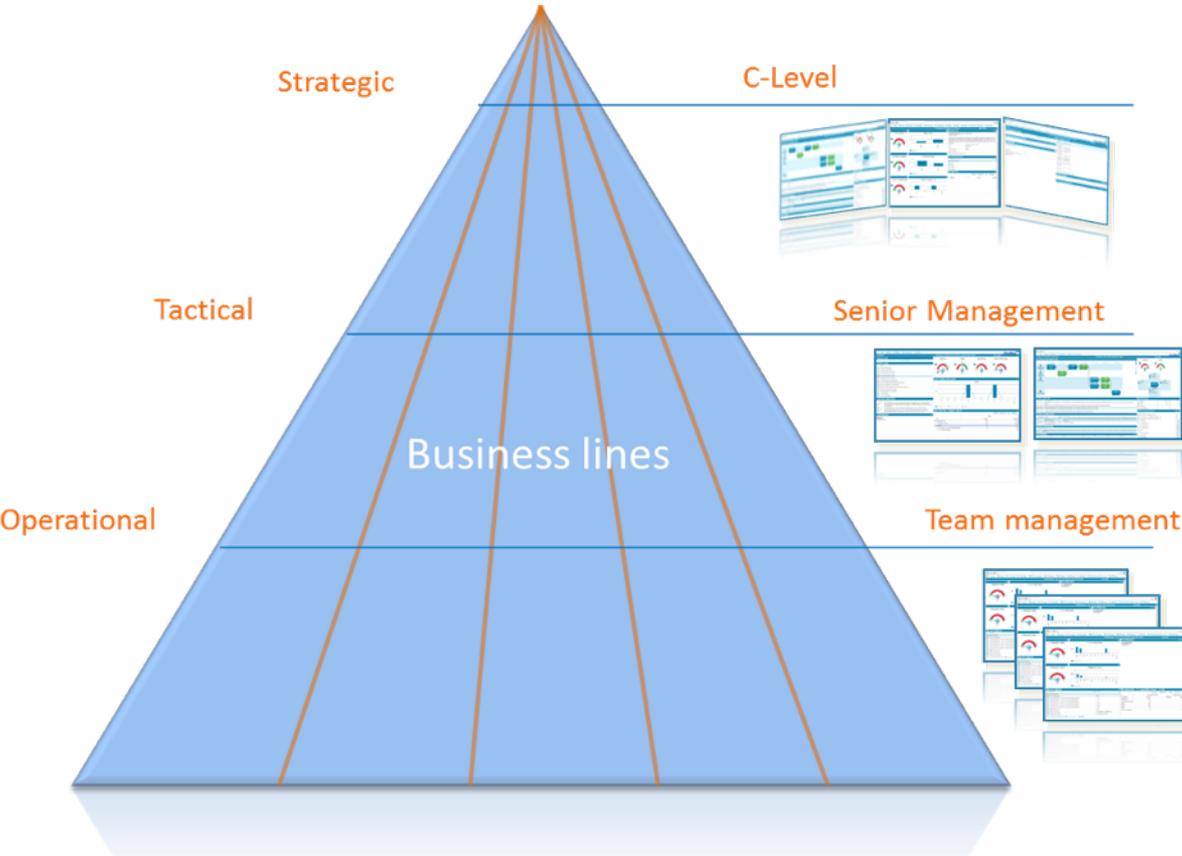
Factual approach to decision making



Mutually beneficial supplier relationships



# Enterprise-wide performance and quality management



# The Business Case

**What is it?** Cockpits connect the people, strategy and business end-to-end

**What do I get?** Cockpits for everyone | Connected strategy, performance, processes and compliance

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**What is it?** Cockpits connect the people, strategy and business end-to-end

**What does it do?**

- ✓ Makes business processes more lean
- ✓ Delivers on your customer promise
- ✓ Keeps everyone compliant

**What do I get?** Cockpits for everyone | Connected strategy, performance, processes and compliance

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## What is the added value?

- ✓ Speed up change management processes  
Up to 70% agility increase through smart data connector
- ✓ One click reports  
Up to 75% reduction in time spent on reporting
- ✓ Sustained improvement cycles  
Up to 20% operational efficiency benefits
- ✓ Visual improvement analysis  
Up to 30% more efficient

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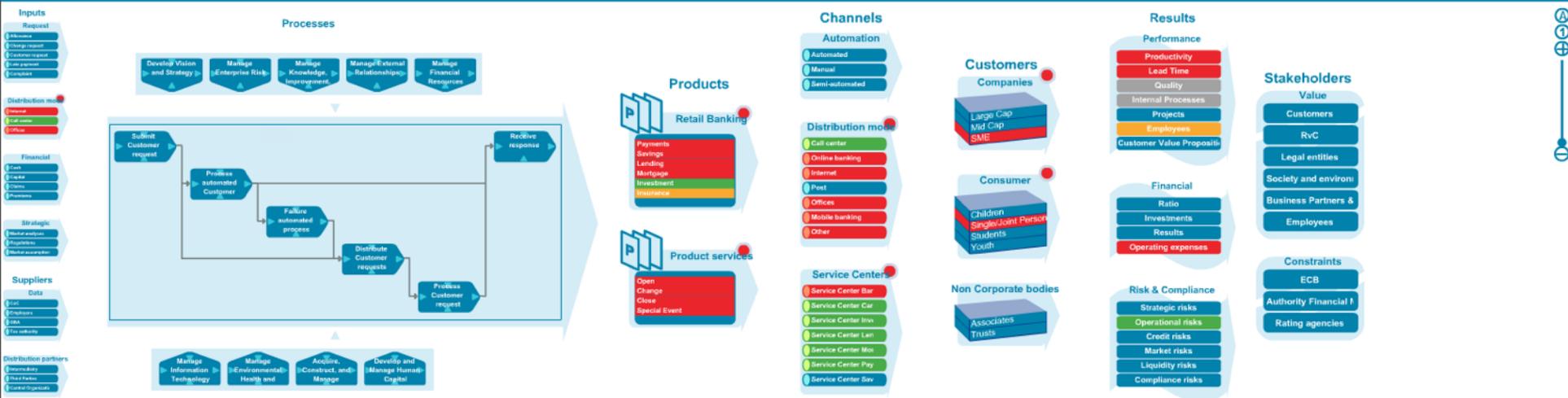
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**What do I get?** Cockpits for everyone | Connected strategy, performance, processes and compliance

# Example capabilities

# Dynamic Strategy Execution



## PERFORMANCE INDICATORS

Indicator	Unit	Actual	Trend	Planned
Balance	Euro (x1000)	39,776.7	▲	28,434

## PERFORMANCE INDICATORS [SUB]

Indicator	Unit	Actual	Trend	Planned
Credit	Euro (x1000)	19,678.9	▲	
Debet	Euro (x1000)	59,455.6	▲	

## CHART



## INFORMATION

**Balance - Finance Cube Indicator**

Context	Finance (Business Cube)
Category	Financial (Category)
Type	Performance
Scale	1,000
Unit	Euro
Roll Up	Sum
Roll Up Tree	True
Time Aggregation	Default
Dec. Display	1
Sequence	300
Fix Max Value	False
Is Key	True
Is Visible	True

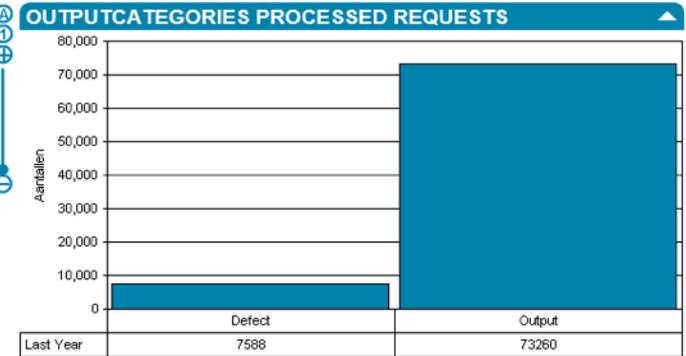
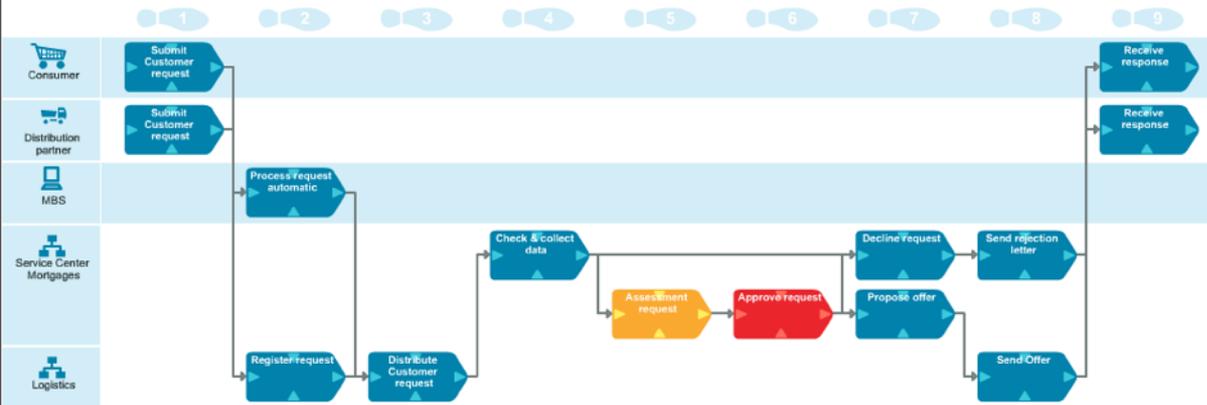
**Value Types**

Actual (Cube Indicator Value Type)  
Planned (Cube Indicator Value Type)

# Dynamic Process Performance Management

Workflow: Offer mortgage Open Consumer Performance: Last Period, Actual versus Planned

Locking



### PERFORMANCE INDICATORS

Indicator	Unit	Actual	Trend	Planned
LT within standard	%	49.3	▼	100
LT# outside standard	Customer requests	1,302	▲	
Process Lead Time	Days	10.8	▲	6.3
Input	Customer requests	1,914	▼	
Input in hours	Hours			
Work in progress	#	1,468	▼	
Work in progress in hours	Hours	120.3	▼	
Output	#	2,395	▲	
Output in hours	Hours			
Defects	#	76	▼	

Page 1 of 2 (13 items) [1] 2



### ACTIONS

Subject [v] Assigned To [v] Status [v] Due Date [v]  
No data to display

### DECISIONS

Decision [v] Initiated By [v] Initiated On [v]  
No data to display

### REPORTS & DOCUMENTS

Name [v]  
No data to display

### ANALYTIC

Indicators [v] Dimensions [v] Views [v] Settings [v]

Dimension	Actual	Planned

# Dynamic Capacity Management

Home | I Manage | My Strategy | My Organization | My Finance | My Teams | My Total Performance

Organisation: Service Centers Performance: Last Period, Actual versus Planned

ORGANIZATION

PERFORMANCE INDICATORS [PARENT]

Indicator	Unit	Actual	Trend	Planned
Productivity	%	55.9	▼	70
Capacity	%	1.3	▲	1
Balance	Euro (x1000)	3,345.7	▲	2,782.5
LT within standard	%	58	▼	100
LT# outside standard	Customer requests	1,978	▲	
Input	Customer requests	3,152	▼	

Page 1 of 2 (11 items)

COST CENTERS

Name

- 56113
- 53311

PERFORMANCE INDICATORS [CHILDREN]

Indicator	Unit	Actual	Trend	Planned
Availability	%	86.1	▲	80
Output in hours	Hours	158.7	▲	

EXPENSE GROUP

Dimension

Dimension	Actual	Planned

CHART

Productivity

Actual Planned

ACTIONS

Subject	Assigned To	Status	Priority	Start Date	Due Date	Completion [%]
test	Janine Ritsema	Running	High			
test action	Pieter den Hollander	Planned	Medium	11/21/2012	11/23/2012	

ANALYTICS - BALANCE - TOP 10

Organizations	Balance		Productivity	
	Actual	Planned	Actual	Planned
Service Centers	3,345,668.2	2,782,490.9	58.3	70.0
Service Center Payments	534,164.5	451,582.0	Infinity	70.0
Service Center Cards	409,914.5	223,827.6		70.0
Service Center Mortgages	369,689.5	281,912.4	Infinity	70.0
Service Center Banking	352,494.5	329,278.3	32.8	70.0
Shared Services	309,462.9	276,897.7		70.0
Productmanagement	304,065.1	63,069.1		70.0
Service Center Savings	284,306.1	291,484.6		70.0
Service Center Investments	250,157.1	317,759.2	Infinity	70.0
Service Center Life	240,599.5	223,106.8		70.0
Service Center Lending	148,321.8	122,244.1		70.0

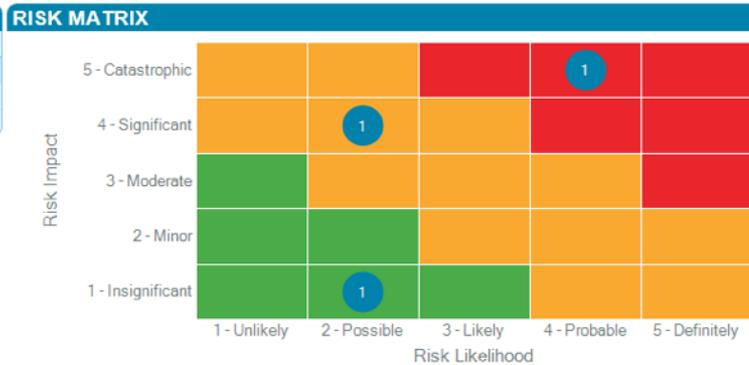
# Efficient Enterprise-wide Risk Management

Workflow: Support process

Performance: Last 12 Months, Actual versus Planned

Locking

WORKFLOWS	
Name	
Perform General IT Controls	
Execute MWS process	
Execute regular Datamanagement	



INFORMATION	
Perform General IT Controls Workflow	
Type	Support

RISK CONTEXT	
RC Code	Control Objective
RC120001	1001 Software and databases that can not be accessed or mutated by unauthorized persons or automated means, and that the security of external links is guaranteed.
RC120002	1002 Continuity of computer operations is guaranteed including backup and recovery.
RC120003	1003 All changes to applications by the responsible management are authorized, documented, tested, and approved before being taken into production.

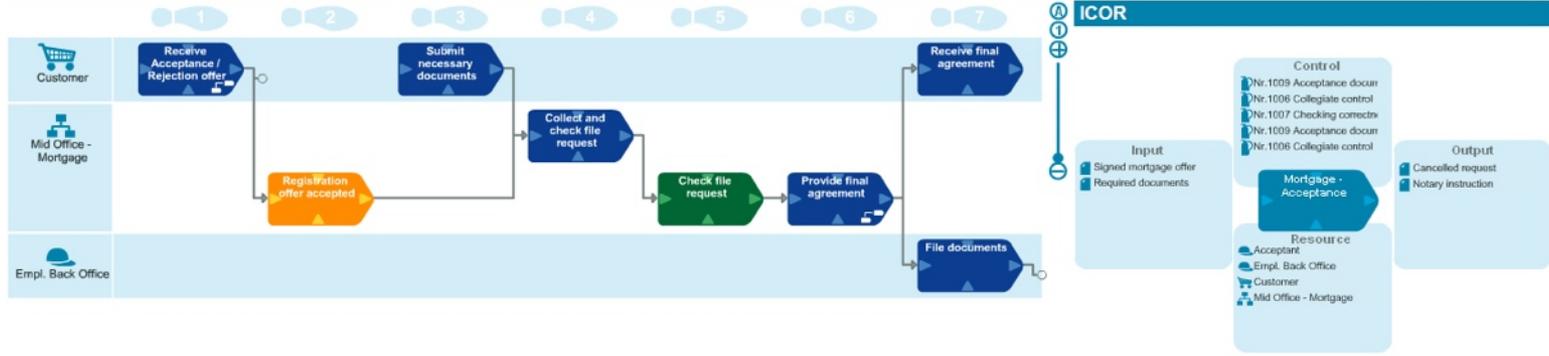
CONTROL OBJECTIVES	
Number	Name
1001	Software and databases that can not be accessed or mutated by unauthorized persons or automated means, and that the security of external links is guaranteed.

RISK CONTEXT						
RC Number	Business Context	Risk	Risk Analysis	Likelihood	Impact	Response
RC120001	Perform General IT Controls - Perform Security Policy	Logical & Physical Access Security		2 - Possible	4 - Significant	Avoid

RISK CONTEXT DETAILS			
RCD Number	Control	Frequency	Audit Description
10011	1001 Information Security Policy	Yearly	
10021	1002 User access procedure	Yearly	
10031	1003 Personal user accounts	Yearly	
10041	1004 Network password profiles	Yearly	
10061	1006 Workstation password profiles	Yearly	
10081	1008 Firewall	Yearly	
10091	1009 Legal Hack	Yearly	

CONTROL			
Number	Name	Method	Description
1001	Information Security Policy	ITC	

# Risk controls embedded into processes and performance



RISK	
Name	Description
Process Acceptance risks	The risk of insufficient effective and / or insufficiently effective processes in forming new relationships (customer acceptance, pricing and negotiation) with (new) customers or counterparties.

CONTROLS		
Name	Description	Method
Nr.1007 Checking correctness and completeness of data entered	A second employee checks the correctness and completeness of data entered on the basis of the request form. If agreement he signed off on the cover. Nr.1007	
Nr.1006 Collegiate control	A second employee checks the first employee ingevorde data for accuracy and completeness on the basis of the original documents. Nr.1006	
Nr.1009 Acceptance documents mortgage	The merchant verifies the copy passports based on the GBA and wage data based on plausibility and annual statements. Nr.1009	

AUDIT FINDINGS				
Name	Description	Impact	Auditor	Audit Date
Audit - Jul 2012		1 - Minor	Quality Control - team 2	9/11/2010

AUDIT ACTIONS				
Subject	Assigned To	Status	Due Date	
Audit Jul 2012 - MA - C 1009	Pieter den Hollander	Proposed	9/6/2012	

RISK INDICATORS				
Indicator	Unit	Actual	Trend	Planned
Audit Performance	%	96		
Audits	#	290		300
Audit Findings	#	11		

**INFORMATION**

**Mortgage - Acceptance Workflow**

Type: Core

**Inputs**  
Signed mortgage offer (Data)  
Required documents (Data)

**Controls**  
Nr.1009 Acceptance documents mortgage (Control)  
Nr.1006 Collegiate control (Control)

**Outputs**  
Cancelled request (Data)  
Notary instruction (Data)

**Resources**  
Acceptant (Function)  
Empl. Back Office (Function)  
Customer (Customer)  
Mid Office - Mortgage (Organization)

# Calculate and display forecast values

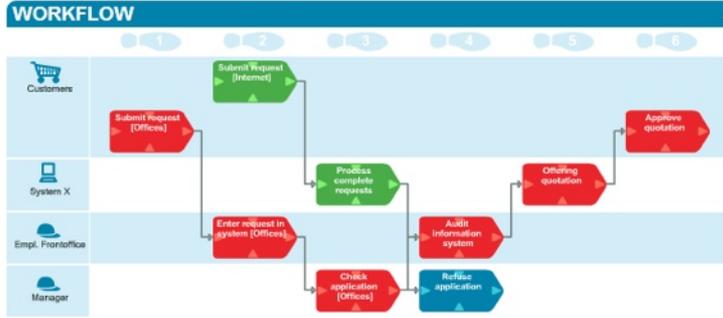


# Execute what-if scenario's to identify performance improvement

Workflow: Request handling Savings Accounts

Performance: Year To Date, Actual versus Planned

Locking

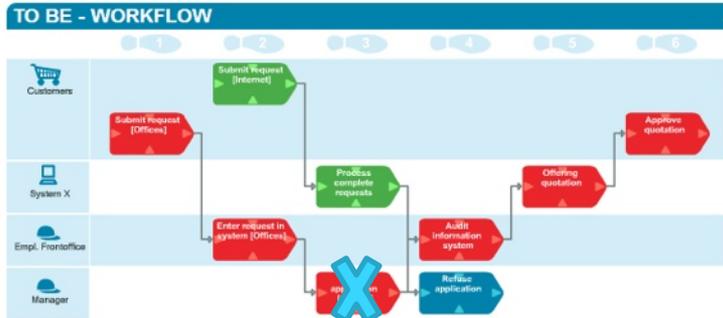


### DISTRIBUTION CHANNEL

Name	Current Ratio
Office	70
Internet	30

### INDICATORS

Indicator	Unit	Actual	Trend	Planned
Customer request within norm Total	%	48		100
Process within norm Internet	%	100		100
Process within norm Office	%	25		100
Process Cycle Time	Days	16		14



### TO BE - DISTRIBUTION CHANNEL

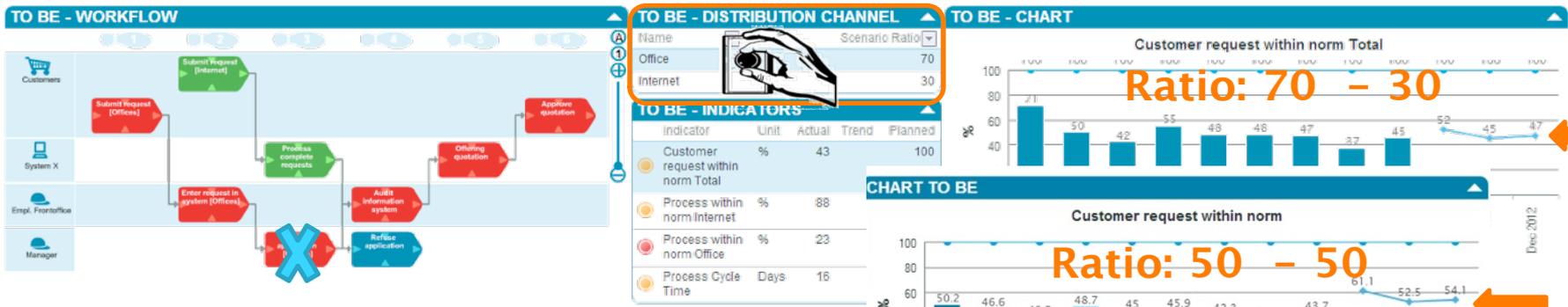
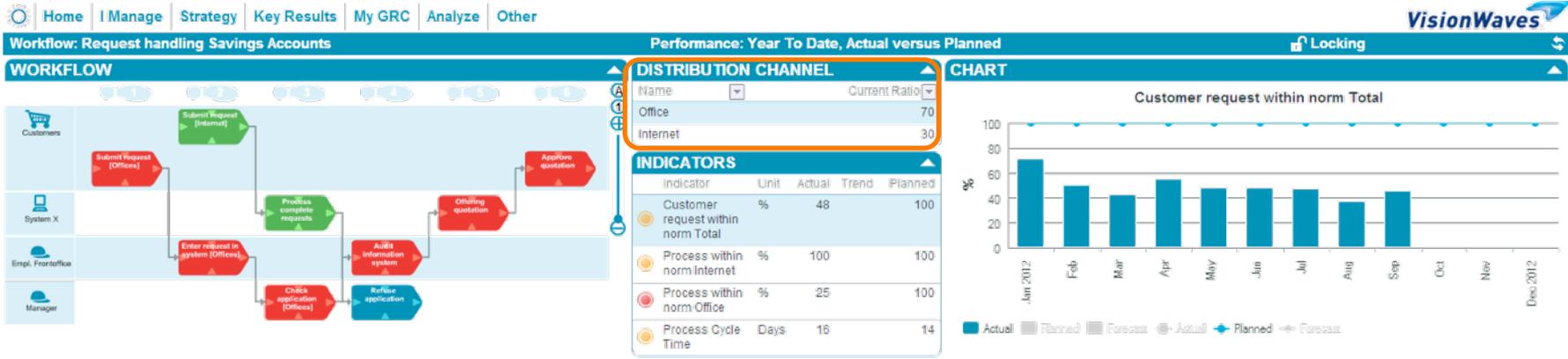
Name	Scenario Ratio
Office	70
Internet	30

### TO BE - INDICATORS

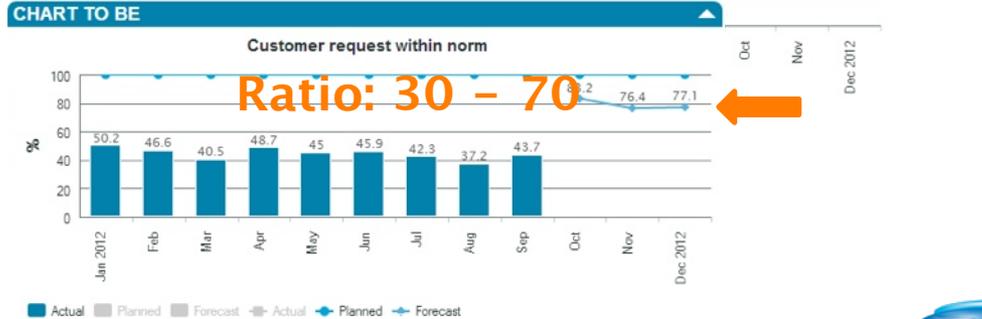
Indicator	Unit	Actual	Trend	Planned
Customer request within norm Total	%	43		100
Process within norm Internet	%	88		100
Process within norm Office	%	23		100
Process Cycle Time	Days	16		14



# What if scenario: Adjusting ratio to examine best options



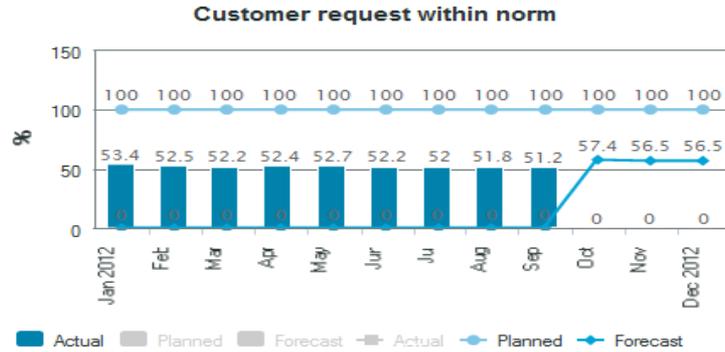
By adjusting the ratio on the distribution channels, forecast values will be calculated and can be compared with the set business targets.



# Impact what-if scenario's on financial indicators

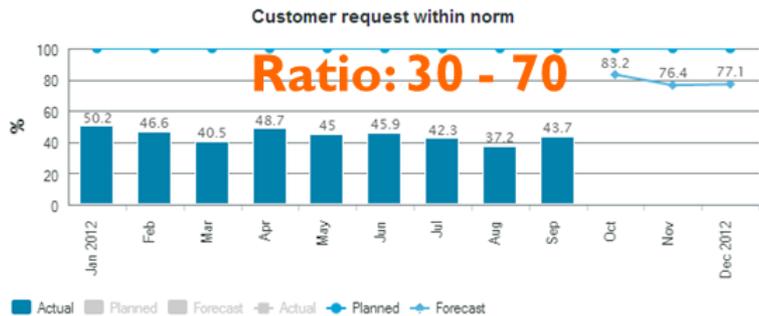
## A: Impact workflow

### CHART TO BE

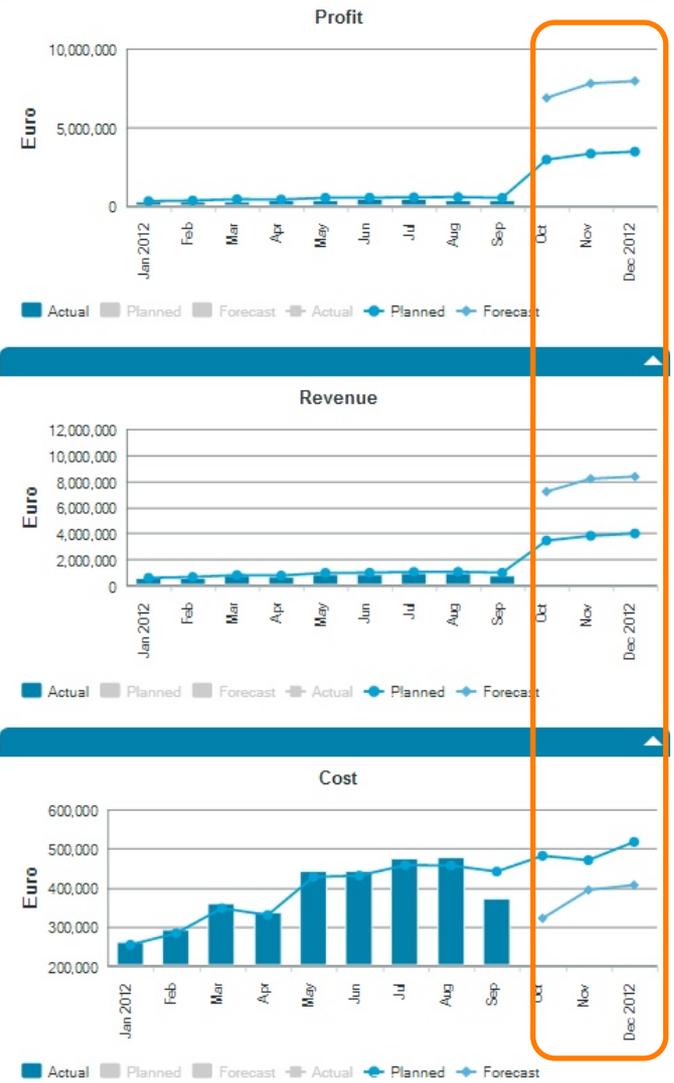


## B: Impact Channel mix change

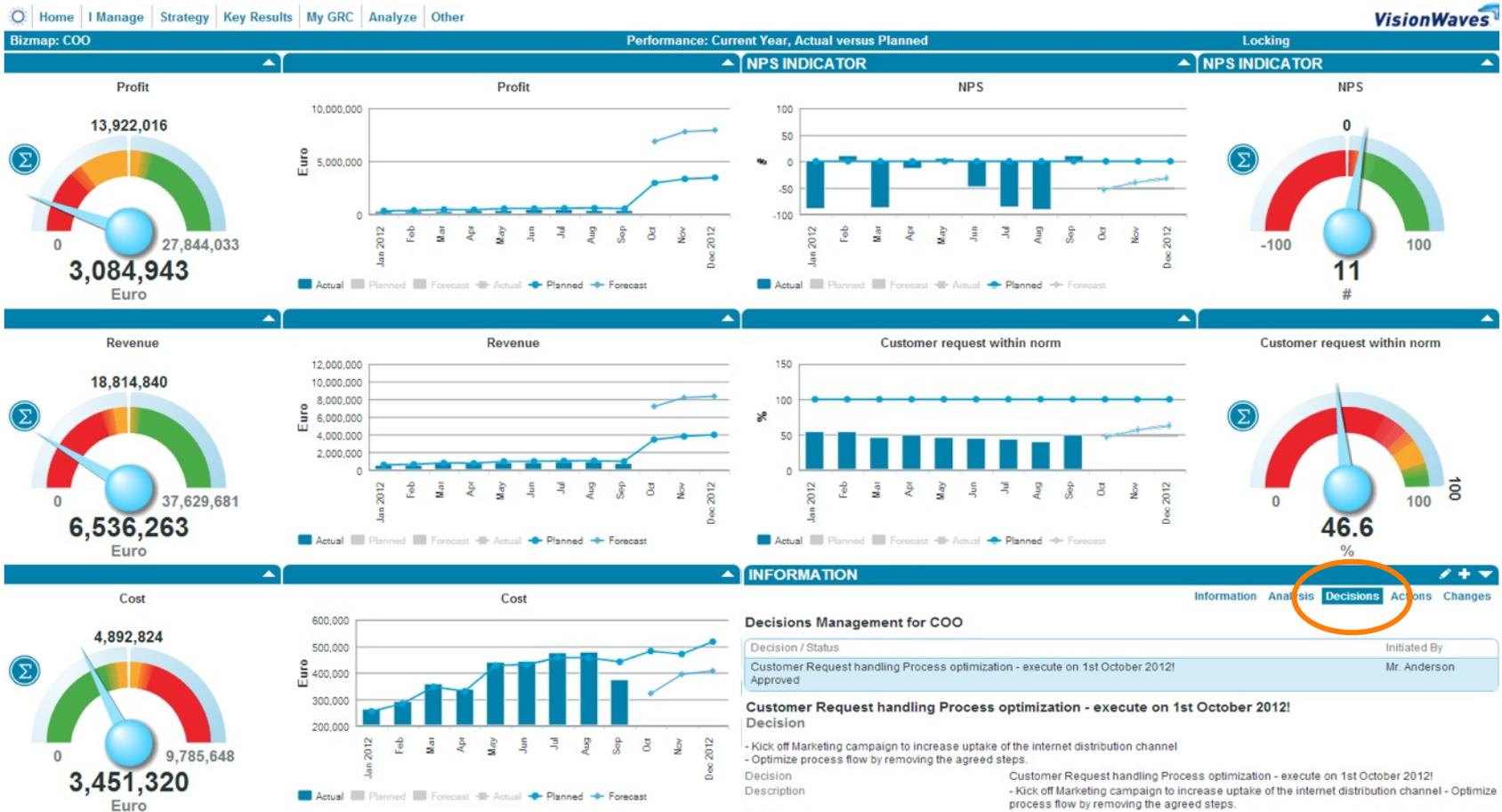
### CHART TO BE



## Predicted forecast values



# Sharing the decision via Team Meeting Page



On the Key Performance cockpit, the COO, together with his Change Team, logs the Decision on August 15<sup>th</sup> to make the process and channel changes effective per 1<sup>st</sup> October 2012!

# Back up slides



# Agile Change Management

3

Industry Management Cockpits

- Industry best practice knowledge transfer via libraries and content
- Fast deployment because of prepackaged cockpits
- Business value creation

2

Connected Management  
Cockpits

- Object model drives technology, business driven
- Single Point of Truth because of Enterprise Business Methodology
- Single platform integrates Strategic, Tactical and Operations
- Increases speed and quality of decision making process

1

Technology Engine

- Agile, fast change
- Low TCO because of low administration and license costs
- Consolidated reporting from multiple data sources

0

Microsoft SQL BI

- Underpinning Microsoft SQL BI is leading in Gartner's Magic Quadrant
- Low license costs

# Agility that makes a difference

Technology  
engine



Classic  
BI



# Agility that makes a difference

## Technology engine



Change business model via Designer or Cockpit and press Save – Specialist  
Save adjustment generates **automated change** in: Database ETL Cube RS Reports

Cockpits  
Deliver change to business

**Change time: 1 week**

## Classic BI



Interviews for capturing change requirements

Deliver Functional Design

Impact and change Database (DBA specialist)

Impact and change on ETL (Technical BI specialist)

Impact and change on Business Cubes (Functional BI specialist)

Impact and change RS Reports (Report specialist)

Deploy

Deliver change to business

**Change time: 6 months**

# Selection of clients and partners



## Our offices

### USA

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