Streamline your outdated process for maximum efficiency.
ABOUT US

The world is moving at record speed. Processes in your business that worked yesterday may not be as effective today. People turnover, problems arise, and band-aid solutions are implemented to address immediate, pressing issues within a constrained budget that did not anticipate the unforeseen. OPTIMUS | SBR has the proven process improvement expertise to ensure that your complex systems are properly documented and communicated so that your business can stay ahead of the curve.

For over 30 years, OPTIMUS | SBR’s integrated process improvement approach has driven innovative change into your business. From general process assessments and detailed mapping and documentation, to organization reviews and redesign, OPTIMUS | SBR will streamline the way you do business.

WHO WE ARE

OPTIMUS | SBR is a management consulting firm focused on supporting executive leaders and their organizations in solving problems, facilitating change and optimizing performance.

Since 1979, we have provided leading firms across North America with advisory services customized to address unique needs, including process and implementation planning, strategy and leadership development, and project management.

OUR CAPABILITIES

Management Consulting • Resource Augmentation

Strategy • Process Improvement • Project Management • Research & Analytics • Governance & Executive Leadership

OUR VALUES

How we do things is just as important as what we do. Our consultants behave in accordance to our value system:

Teamwork • Integrity • Passion • Initiative • Leadership

PRACTICE AREAS

Our process improvement experience spans across our key practice areas:

Financial Services | Energy & Infrastructure | Health Care & Not-for-Profit |
Government & Agencies
Does Your Process Seem Outdated?

Processes in an organization that are outdated or cumbersome can cause significant disruptions in the success of your business.

Systems don’t work, customers complain and the data doesn’t align with reality.

Are your processes current enough to fulfill the maximum potential of your business?

PROCESS IMPROVEMENT

THE CHALLENGE

You’ve seen it before. The pressure to keep up with changes in your customers’ expectations, or competitive shifts in the market with constrained budgets and timelines forces band-aid solutions to quickly solve a pressing issue.

Eventually these solutions succumb to the weight of too many temporary fixes addressing too many outdated requirements. Even if your band-aid solution is still getting the job done, it is most likely costing your organization a fortune.

And then you realize: it’s time for a process overhaul.

COMMON SYMPTOMS OF INEFFECTIVE PROCESSES

Improved processes can dramatically benefit how your organization conducts business. Gaps are eliminated, functions run smoother and people can focus on what is important, rather than being bogged down with ineffective procedures.

Have you felt any of these common symptoms of ineffective processes?

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Bottlenecks in the business that result in reduced or failed delivery of services</td>
<td></td>
</tr>
<tr>
<td>2. Outdated systems that inhibit your people from working as effectively as possible</td>
<td></td>
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<tr>
<td>3. Unclear roles or accountabilities that result in duplicated efforts and neglected areas</td>
<td></td>
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<tr>
<td>4. Upset customers or stakeholders due to untimely responses</td>
<td></td>
</tr>
<tr>
<td>5. Inaccurate reporting that fails to provide a clear picture of revenue streams</td>
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If you have answered yes to any of the above, it may be time to take a closer look at process improvement initiatives.
BENEFITS OF PROCESS IMPROVEMENT

- **Best Practices to Leverage** – Best practices that have been developed by certain groups or teams can now be shared across the organization.
- **Deviation from Standard Processes Uncovered** – Groups will likely have pockets of work that will not conform to prescribed processes and accountabilities that will be highlighted, documented, and analyzed.
- **Diversity in Groups Identified** – Select processes, methodologies, tools will vary from group to group; this creates an opportunity to uncover what’s working, what isn’t, and what could be shared with others.
- **End-to-End Process Improvement** – This exercise will uncover a number of issues with existing processes and identify opportunities for improvement, both in the short and long-term.
- **Heightened Employee Engagement** – The involvement of select stakeholders in the review process will help to establish buy-in and consensus governing the new structures and processes going forward.

*Updating processes can lead to positive results that reach far-beyond the intended group.*

OPTIMUS | SBR PROCESS IMPROVEMENT

OUR ADVANTAGE

OPTIMUS | SBR’s proven process improvement approach drives innovative change into your business. Our integrated solutions take into account not just the process itself, but also the complexities of your strategy, organizational structure, and existing resources and capabilities.

The results represent feasible process improvements that maximize the productivity of all resources in order to drive operational excellence and achieve sustainable and long-term profit enhancement.

From general process assessments and detailed mapping and documentation, through to organization reviews and redesign, our responsive, execution-focused approach will enable your organization to streamline the way you do business.

OUR METHODOLOGY

Using a methodology tailored to achieving practical and sustainable results, OPTIMUS | SBR is a potent resource to meet your needs for sound, streamlined processes.
1. ORGANIZATION REVIEW & DISCOVERY

We start with a comprehensive review of your organization to garner a better understanding of the requirement, as well as your group as a whole.

This phase sets the stage for engagement and buy-in from your key stakeholders, and helps with the early identification of issues and gaps.

We accomplish this by:
- Collecting all pertinent documentation
- Holding working sessions to develop an understanding of reporting structures, accountabilities and preliminary issues and gaps
- Developing an enhanced understanding of a high-level process lifecycle to prepare for the current state

2. CURRENT-STATE ASSESSMENT

Following the discovery phase, the current state of your processes are carefully mapped out and fully documented so that a clear picture can emerge. This document is then presented to your key stakeholders for validation to ensure accuracy.

Our approach includes:
- Holding cross-functional working sessions to map key processes
- Identifying and recording accountabilities, hand-offs, bottlenecks, issues/gaps and controls
- Validating processes and approaches to ensure accuracy and to achieve agreement from relevant stakeholders

3. TARGET STATE

Once the current state has been identified and agreed upon, the next phase is to determine how the process should look going forward.

Following the creation of the target state, a session is held with your key stakeholders to validate and reach a consensus on the proposed approach.

We achieve this by:
- Referencing and incorporating industry best practices
- Conducting facilitated working sessions with stakeholders
- Leveraging current processes that have been deemed successful
4. GAP ANALYSIS & RECOMMENDATIONS

The Issues and Gaps Roster is an inventory of all issues and gaps collected throughout the engagement. Gaps and opportunities for improvement in the current state processes will be identified, documented and scored based on pre-determined criteria.

Issues and gaps are identified into two categories, those that can be addressed easily in the short term (quick wins), and those strategic issues that become the recommendations for the target state. Recommendations are distilled into a business case format that is easily understood.

Sample of Issues & Gaps Analysis Roster

<table>
<thead>
<tr>
<th>ID</th>
<th>ISSUE / GAP CATEGORY</th>
<th>ISSUE / GAP SUBCATEGORY</th>
<th>CONSOLIDATED ISSUE DESCRIPTION BY SUB-CATEGORY</th>
<th>QUANTITATIVE ISSUE ANALYSIS</th>
<th>QUALITATIVE ISSUE ANALYSIS</th>
<th>IDENTIFICATION</th>
<th>URGENCY &amp; STRATEGIC IMPORTANCE</th>
<th>WEIGHTED SCORE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Internal Audit</td>
<td>Process</td>
<td>Process weakness</td>
<td>3</td>
<td>3</td>
<td>1 7 1 1 2 9</td>
<td>7.67</td>
<td>8.83</td>
</tr>
<tr>
<td>2</td>
<td>System Design</td>
<td>Roles &amp; Responsibilities</td>
<td>Lack of clearly defined department/unit roles and accountability</td>
<td>2 2 1 5 2 2 6 9</td>
<td>9.67</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Employee Engagement</td>
<td>Work Impact</td>
<td>Increased work due to additional software, lack of training, value effort</td>
<td>2 3 2 7 2 2 4 11</td>
<td>10.67</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Monitoring &amp; Controlling Processes</td>
<td>Metrics</td>
<td>Metrics do not adequately address key monitoring aspects of the organization</td>
<td>3 3 1 7 2 2 4 11</td>
<td>10.67</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Policy &amp; Procedure</td>
<td>Procedural deficiency and weaknesses to standard</td>
<td>3 3 1 7 2 3 5 12</td>
<td>12.17</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
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For Cost of Status Quo: 0 = High Cost, 1 = Moderate Cost, 2 = Low Cost

Our solution includes:
- A unique tool that creates an inventory of issues and gaps
- A list of Ancillary Recommendations for “quick wins”
- A scoring roster that leverages industry best practices and organization specific qualifiers

5. IMPLEMENTATION PLAN

Leveraging the recommendations from the gap analysis, a detailed, actionable plan will be created outlining both short- and long-term enhancements.

This plan acts as the roadmap as your organization navigates towards the carefully crafted target state.

Sample of High Level Implementation Plan

We accomplish this by:
- Focusing on strategic changes that need to occur to improve the process
- Creating an actionable plan that is customized to your needs
- Clearly mapping out a timeline and accountabilities for all relevant players going forward
THE REALITY

- Ineffective processes can negatively affect your business, without being overly apparent
- Band-aid solutions may work for a short period, but can cost your organization thousands in lost money and time
- Keeping your processes current will allow your organization to maintain a competitive edge

THE SOLUTION

- Our services allow you to build an environment grounded in results-focused execution, from general process assessments and detailed mapping and documentation, through to organization reviews and redesign that will streamline the way you do business
- We provide high quality resources to meet your needs for sound, streamlined processes
- Our proven multi-disciplinary approach takes into account not just the process itself, but also integrates well into your strategy, organizational structure, and existing resources and capabilities

THE BOTTOM LINE

Change is inevitable. How you choose to embrace the change will determine the ultimate success of your business. OPTIMUS | SBR’s proven process improvement approach eliminates ineffective methods that diminish the ability to succeed and provides streamlined solutions that strengthen your overall business.

This means you get a true business partner that will leave you with a legacy of value and self-sufficiency long after our engagement has ended.

It’s time.