

# Resultmaker Business Concept

*– intelligent, dynamic processes*



## Prehistory – Where did the idea come from?

The original inspiration for starting up a company came from the situation just before the year 2000, when everyone was talking about turn of the century problems in connection with IT systems.

A major source of income for IT consulting companies was training new university graduates in how to set up an IT system so it could get through the turn of the century without breaking down. After a short training course and with no experience, these new graduates could set up the systems.

What they did was based on rules.

Consequently it must be possible to create a formula for what the consultants were doing. If a formula were possible, then it could be programmed into an IT system that could set up other IT systems, just the way the consultants were doing – and perhaps even do the job with fewer errors and with documentation for the work that had been performed.

This gave inspiration to an idea - creating an IT system that could automate the execution of tasks that can be done using rules and data.

Later the idea was matured and developed into the business concept we know today.

## The Resultmaker name – Why are we called what we are?

Our business is to *support* and *automate* processes. It can be done gradually, on different levels, more or less sophisticated – and so we do.

Our solutions range from guided intelligent forms to complete end-to-end processes with automated case handling and preliminary decisions.

*Resultmaker* expresses our genuine ambition and potential to fully support and automate processes end-to-end and thereby create the final result of our customer's processes.

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# Why are we here?

## Our business concept

Resultmaker is a Danish software and consulting company established in the year 2000.

We make a living from building intelligence and dynamics into work and decision processes, so the processes become catalysts for our customers' businesses.

## The background for our business concept

The background for our business concept is first and foremost the realization that the knowledge and processes of a business are the very essence of running and developing the business and are therefore the greatest barrier or catalyst for this.

We know that companies need to handle increasingly extensive, dynamic and specialized processes and to meet growing demands for structure in the form of documentation, uniformity, measurability and traceability.

At the same time, companies need to act quickly and precisely in a changing world, reduce their expenses, and use their resources more efficiently.

These needs are what we help our customers achieve.

## What we do for our customers

We put the customer in control of his or her business processes and make the processes into a catalyst for the company. We give our customers:

1. The ability to check, document and adapt work and decision making processes in a changing world.
2. Improved and consistent quality of services.
3. Greater efficiency.

## Our tools

Our tools are our knowledge of the customer's business, our experience with process design and knowledge mapping, and our unique, patented software.

Our software handles complete work and decision making processes in which people and IT systems work together in flexible, integrated flows and in which knowledge and experience can be stored and used by the system itself to modify the process, carry out case handling and support decision making by the process participants.

# Resultmaker Process Matrix™

What makes Resultmaker unique with respect to designing and carrying out processes is Resultmaker Process Matrix™. Resultmaker Process Matrix™ forms the core of our software and is a method for designing and carrying out processes. Resultmaker Process Matrix™ represents a unique way of analyzing and handling processes.

## How we handle processes

- We let the context control the process. We split the process apart, create only the necessary connections among participants and activities via dynamic rules, and let the input to the process determine how it proceeds.
- We view the process as a coherent whole and handle it from start to finish.
- We consolidate work processes and decision processes into a single process.
- We view people and systems as equal partners in a common process. Therefore, we don't separate processes carried out by people from processes carried out by systems.
- We divorce process logic from system logic so the business controls the processes and the IT organization controls the systems.
- We build intelligence into the systems and let the systems handle knowledge and make decisions insofar as possible.
- We make the processes scalable.

No.	Activity	Applicant	Case worker	Office Manager	System	Predecessors	Conditions	When
							Apply for > 200 \$ Money granted	
<b>1. Application</b>								
1.1	Apply							Always
1.2	Sign					1.1		Always
<b>2. Case Handling</b>								
2.1	Control							Always
2.2	Approve					2.1		Always
2.3	Authorize					2.1	A	If
2.4	Answer					2.2,2.3		Always
<b>3. Execution</b>								
	Payment Call							If
	Machine Response					3.1		
	Receipt					3.2		
<b>4. Conclusion</b>								
4.1	Archive							Always

Figure 1 Process design based on Resultmaker Process Matrix is flexible and scalable

## Processes - What do we deal with?

### A process is not just a process...

Basically, we deal with work and decision making processes. However, such processes can vary considerably. They can be more or less extensive, dynamic, knowledge-heavy, complex, etc.

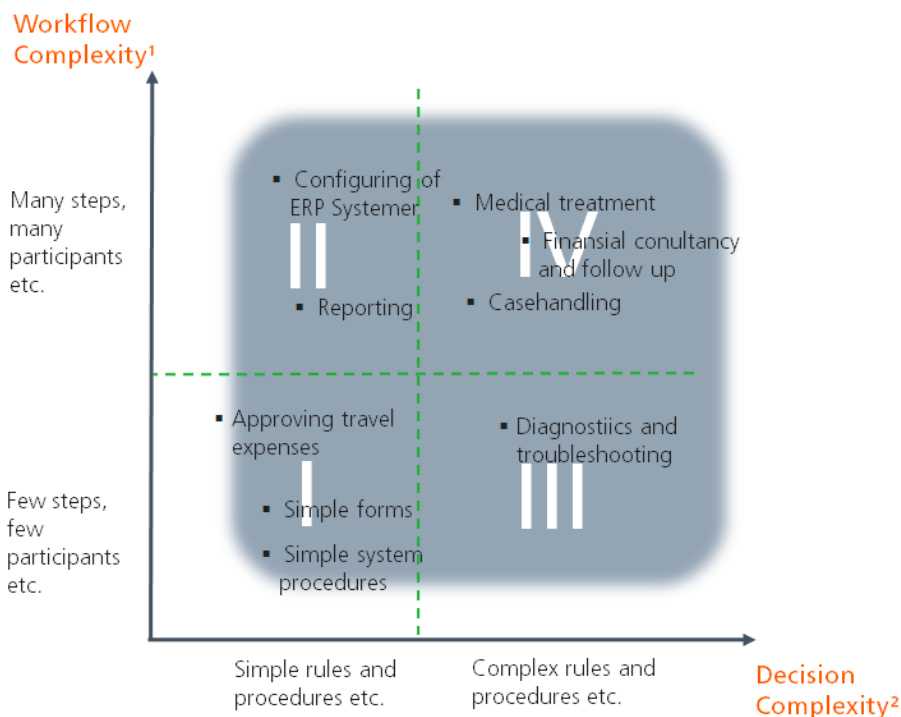
To give a more precise characterization of what we actually do, we have categorized processes and the demands they make for support and will illustrate what we mean with two examples.

### Categorizing processes

*From simple processes to dynamic, highly complex processes*

It's a long way from a simple process like approving travel expenses to extensive and complex processes like diagnosing and treating a patient at a hospital, giving financial advice in a bank or handling cases in public administration. And what is necessary in order to optimize and support the process also varies.

It is therefore a good idea to categorize processes and the degree to which they require support.



**Figure 2 Resultmaker Process Platform handles complexity well**

1. Workflow complexity: Number of steps, dynamics, people involved, systems, dependencies, transfers, timing and degree of predictability.

2. Decision complexity: Extent of data/documentation and rules on which the process is based, extent of human knowledge and experience on which the process is based, number of decisions and their possible outcomes, and the extent to which assumptions may change along the way.

### **Process categories and appropriate system support**

Depending on the complexity and characteristics of the process, an appropriate type of system support must be chosen.

For simple processes with only a few steps and participants and only a few decisions and simple rules (quadrant I), ordinary tools based on flow charts can be used.

For processes with many steps, roles, dependencies, sequence logic and dynamics (quadrant II), project planning tools are usually employed.

For processes with few steps and participants, but many decisions and complex rule sets (quadrant III), expert systems are used.

When a process is very extensive and complex (quadrant IV), advanced workflows with integrated decision support systems are needed.

### **Which processes does Resultmaker support?**

As shown in Figure 2, Resultmaker covers the needs of all four quadrants. Compared with traditional methods, Resultmaker's method is particularly effective in quadrant IV.

Resultmaker's technology and methods are more effective than those of other suppliers when it comes to automating and supporting extensive, dynamic work and decision making processes with a high degree of specialization and a high demand for expertise.

The reason is that with Resultmaker Process Matrix™ method, the complexity of a solution expands approximately linearly with the complexity of the process, while with traditional flow chart methods, the complexity of the solution expands approximately exponentially.

We have established that the Resultmaker Process Matrix™ method is clearly superior to conventional flow chart methods when a process involves more than 24 steps and seven decisions.

## Examples of extensive and complex processes in a changing world

Assignments become more complex, products change, rules change and the market changes... At a constantly increasing rate!

The palette of products and rules that a financial consultant needed to know about used to be limited: for example, mortgage credit institutions simply sold mortgages.

Today, advice is also given about pension plans, insurance policies, investments, personal finances... Further, the legal requirements with regard to control and reporting are steadily rising, with the result that it is almost more demanding to handle processes, documentation and reporting than to carry on one's core business. And focus and resources are removed from the business.

The tendency in other service sectors and in government is the same: greater and greater complexity and faster and faster changes.

Below are two examples of real life processes that show how complex such processes can become and how difficult it can be to obtain an overview of them and control them. These needs are met by Resultmaker's method.

## Example: Financial consulting

Here we have a work and decision making process that is fairly extensive, can require reworking if new information turns up during the process, and in addition, requires specialized knowledge.

Further, it is a situation in which advice that is appropriate today is not necessarily appropriate tomorrow or next week, because the surrounding conditions may change.

Finally, it is a process where it is important to be able to trace and document the basis for the advice given, as the mortgage credit institution can be held responsible if the customer – based on the advice received – makes economic decisions that cause him or her to lose money.

A consultant in a mortgage credit institution is asked to advise a customer: The customer has mortgaged her house with a flexible interest loan of DKK 400,000 and an annuity loan of DKK 900,000. The customer is worried about the interest and is therefore considering converting the flexible interest loan to a loan with a fixed interest rate. The customer is married and has two children. She will soon be taking maternity leave and is therefore facing 34 weeks of reduced pay after the first 14 weeks at full salary. In addition, her liquidity is poor. Her overdraft is depleted because her car broke down and she had to pay DKK 120,000 for a new one. The total income of the household is DKK 660,000 a year. The two children attend a nursery school and an after-school center. The family's house has been assessed at DKK 2,300,000.

What would be best for this customer? To raise the limit on her overdraft? Let her exploit the equity she has in her house? Convert the two existing loans to a single new loan? Exempt the principal of the loans from repayment while she is on maternity leave – or until the third child is ready for nursery school? Or something else entirely...???

While the process is going on, the customer finds out that her grandmother has died. The grandmother had assets amounting to DKK 440,000 plus a summer house that the real estate agent expects to be able to sell for DKK 1,100,000. The customer will inherit one-sixth of the estate. But when will the summer house be sold? And will it be possible to get the expected price? Should the inheritance, or part of it, be invested?

At what point is the customer's situation sufficiently illuminated for the consultant to give her qualified and well founded advice?

What are the policies and strategies of the mortgage credit institution in this area?

Is the consultant sufficiently well trained and in possession of sufficient, up to date information?

How can sufficient documentation for the advice given be ensured?

## Example: Diagnosing a patient

Here we are dealing with a work and decision making process that is extensive, can involve reworking or an entirely new strategy if the circumstances change during the process, and that, in addition, demands specialized knowledge – knowledge that is enormous, is constantly being updated and can result in two different doctors recommending different forms of treatment here and now or in both of them recommending another form of treatment at a later point in time.

Further, we are talking about a type of process in which sub-processes may go on simultaneously and in which certain sub-processes may need to be repeated.

Finally, it is important to be able to trace and document the basis for the final diagnosis and the result of the treatments applied and accumulate knowledge as a basis for better diagnostics and treatment in the future.

A patient is concerned about his health and goes to see his family doctor. The doctor examines the patient and asks him about his symptoms and about his diet, exercise pattern, smoking, and any events that may have caused the symptoms.

The doctor is unable to find a clear explanation for the symptoms, so she refers the patient to the hospital for further examination.

After two months, the patient has an appointment at the hospital. The patient is received and is registered by a medical secretary. The patient is asked to go into the waiting room, weigh himself and measure his height. The scale in the waiting room is out of order, so the patient measures his height and waits to have his blood pressure taken by a nurse. In the meantime, the specialist is waiting for the patient to turn up for examination.

Finally the nurse has time to check the patient's blood pressure. She makes a note of his height and tells him what the rest of the examination will entail. The patient is received by the specialist, who examines him and asks him about his symptoms and whether anything has changed since he consulted his family doctor. The specialist weighs the patient and records the weight. He then sends him to have a blood sample taken by a lab technician.

The patient is then sent home. The blood samples are sent to the laboratory for analysis, and the results are sent back to the specialist.

Based on the measurements, the tests and information about the patient, the specialist must make a diagnosis – but he concludes that there is not a sufficient basis for a conclusive diagnosis. He decides to initiate a preliminary course of treatment and at the same time obtain additional information through repeated blood tests, blood pressure measurements and scanning. However, it will be a month before the patient can be scanned. In the meantime, the patient experiences new symptoms and goes back to his family doctor for another consultation. Based on the new information, it develops that the patient is suffering from a different illness than originally assumed, and that a totally different form of treatment is indicated.

## What needs do we see?

Businesses need to be able to handle more and more extensive, dynamic and specialized processes and meet increasing demands for structure: documentation, consistency, measurability and traceability. At the same time, they need to act quickly and precisely in a changing world, reduce their costs and use their resources more efficiently.

The public sector is particularly interested in reducing administrative costs and improving the services offered to citizens and businesses.

Specifically, we see a growing acknowledgement of the need for:

- Ensuring greater efficiency and better use of resources.
- Carrying out processes dynamically.
- Reducing the complexity of tasks for case workers, consultants, customers, doctors, etc.
- Ensuring objectivity and consistency in case handling.
- Complying with legal demands and best practice.
- Ensuring faster case handling, fewer errors and reworkings, and less duplication of effort.
- Supporting simultaneous cooperation among multiple parties, while ensuring that each participant can get an overview of the process.
- Documenting decisions and ensuring traceability.
- Ensuring measurability and the ability to learn during the process.
- Being able to dynamically modify processes without expensive, time-consuming IT projects.

## How can we fulfill these needs?

Resultmaker's ambitious goal has been to develop a system that can handle entire work and decision making processes in which people and IT systems work together in flexibly coordinated workflows and in which knowledge and experience can be stored and used by the system itself to modify the process, carry out case handling and offer decision making support to the process participants.

Resultmaker's software, Resultmaker Process Platform, is an advanced workflow system with an integrated decision support system.

Resultmaker Process Platform can handle extensive and specialized work and decision making processes dynamically.

### Deal with changing conditions and modify processes without extensive IT projects

The system is constructed in such a way that system logic and business logic are separated from each other. In other words, steps can be changed or modified in the course of the process – and new knowledge and rules can be built into the decision making support system along the way. This makes it possible to adapt to changes without having to invest in a major IT project.

### Let case workers control the process

The role-based design module makes it possible for users to design and maintain processes themselves, while the IT department handles setup, integration, etc.

### Keep the process free of unnecessary bonds and make it dynamic

In Resultmaker Process Platform, each activity in a process is a separate and independent entity. Connections to other activities are established and controlled by rules that govern sequencing and conditions.

For example: "Activity B is a prerequisite for activity A" (sequencing rule) and "This activity is to be carried out if Y is greater than 30 and X is true and Z is false" (condition rule).

### Consequences for process execution

Any activity can be executed independently of other activities, unless a rule determines that they are connected.

This means that activities can be executed simultaneously or in random order, and therefore also *in the order that is most appropriate at any given time*.

Activities can be skipped or repeated, and the process can change direction, *depending on the input received during the process*, and controlled by the process rules.

### Consequences for process design

Because the process is separated into multiple, independent “activity,” “rule” and “role” elements, it is easy to design, develop and maintain the process and to reuse elements. The method is well suited to a workshop approach and makes quick prototyping possible.

### Consequences for extent and complexity

The method makes it possible to handle extensive processes with many activities and many possible outcomes at each step, because complexity only increases linearly with each step – not exponentially, as it would in a traditional solution based on flow chart diagrams.

## Let the system carry out case handling and give decision support to case workers

Resultmaker Process Platform contains a decision support system that can be fed with knowledge about case handling. This means that the system can be supplied with rules, evaluation criteria, calculation formulas and other forms of logic that it can apply to the data it receives during the process. The system can therefore carry out case handling or deliver a recommendation, depending on the completeness of the evaluation criteria, rules and data it has at its disposal. Further, the system can make use of the experience it has gained, both in relation to the process and the specific case. Based on earlier cases, it can make assumptions and use them as a basis for recommending activities and decisions.

In other words, the system can modify the process while it is in progress and can offer decision making support to the case worker.

The ability to analyze and gather knowledge in the decision making support system means that users without expert knowledge do not have to consult experts to make a decision, but can draw on their knowledge via the system.

This means that expert knowledge is made accessible and can be drawn on simultaneously by multiple users, and that case handling is correct, objective and consistent.

It also makes it easier for decisions and argumentation to be made by the system itself, so fewer tasks require human intervention.

At the same time, it is easier to invite external participants to enter the workflow at one or more steps: for example, experts who are asked to contribute their input, or accountants, etc. who are asked for authorization.

## Remove complexity, reduce errors, increase efficiency

The intelligent interface guides users through the process, using built-in rules that, based on the participant’s actions and answers at any given step, determine what the next step should be.

The intelligent interface also ensures that the participant delivers all the necessary information – for example by requiring certain fields in a form to be filled out before one can go on to the next step, or by validating the information entered in a field, either simply or through look-ups in a database. This results in fewer errors, fewer reworkings and faster case handling.

### **Make systems and people equal partners in the process**

The system is open for integration to other systems. It can generate a common data model and thereby handle and validate data exchange with other systems and let other systems function as participants in the process and as recipients of output.

This increases the degree of automation and the ability to trace and document information, and decreases the risk of error.

### **Make cases accessible and ensure documentation and traceability**

Since the system handles the entire business process, the case is accessible at all times to anyone who needs to see it, and it is possible to trace and document the whole process. The system functions as its own record.

This gives an overview and makes it possible to measure, learn, follow up and constantly improve the process.

## **Resultmaker ∴ Innovative People ∴ Decisive Technology**

Resultmaker is a Danish company specialized in the development of intelligent software for improving mission critical business processes across humans and systems – the essence of running and developing the business of our customers.

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