



SIMPLIFY. STANDARDIZE. STREAMLINE.

# IPAK

## Integrated Process Alignment Kit



Process excellence has been extensively discussed, and there are numerous theories and approaches available that try to maximize performance. The Ankura approach applied to business operations is pragmatic and makes use of the lean, six-sigma, and process engineering concepts in a way that is easily understood by all members of a company.

### IPAK CORE PRINCIPLES



#### WHY

**Start with Why:** Unify vision and mission for team alignment

**A North Star:** Define what success looks like



#### HOW

**Sequence of Events:** Generate clarity of how a process should work

**With Which Tools & Systems:** Illustrate how tools are leveraged to improve outcomes

**Expectation Setting:** Align policy and controls to promote consistency and appropriate guardrails



#### WHO

**Clear Roles and Responsibilities:** Drive accountabilities

**Clean Handshakes:** Define handoffs and partnerships



#### WHEN

**Service Level Concept:** Set expectations on when things must be complete

**A Single Calendar:** Create fairness in expectations with a true clock



#### WHAT

**Achievable Targets:** Set KPIs linked to financial outcomes that help move towards best practice

**Measure With Intent:** Link metric to workflow to allow for management of resources

**Continuous Feedback:** Identify weak links or systemic improvement opportunities

# HOW THE IPAK WORKS



## Define the Integrated Process

Outline function

Define sub-process

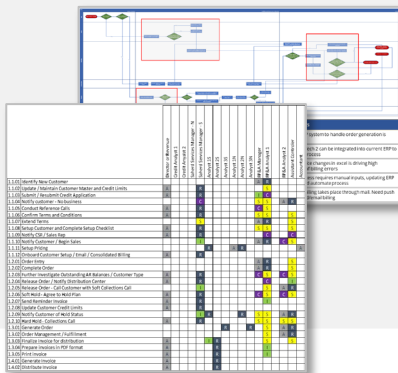
Capture technology touchpoints

Determine process step RACI

Clarify handoffs

Confirm policy/ controls

Validate delivery requirements



## Measure and Target

Set measurement criteria

Benchmark internal best performance

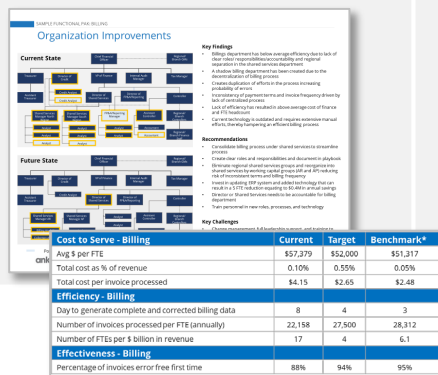
Benchmark industry performance

Evaluate current maturity of operations

Measure and target cost-to-serve

Set time-sensitive targets

Confirm initiatives (if applicable)



## Build and Deliver Playbook

Build instruction materials

Create cheat sheets

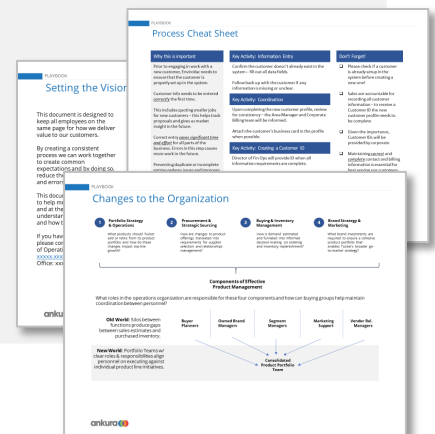
Establish a knowledge repository

Train and instruct

Monitor and measure

Enforce and triage

Prioritize future improvements



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