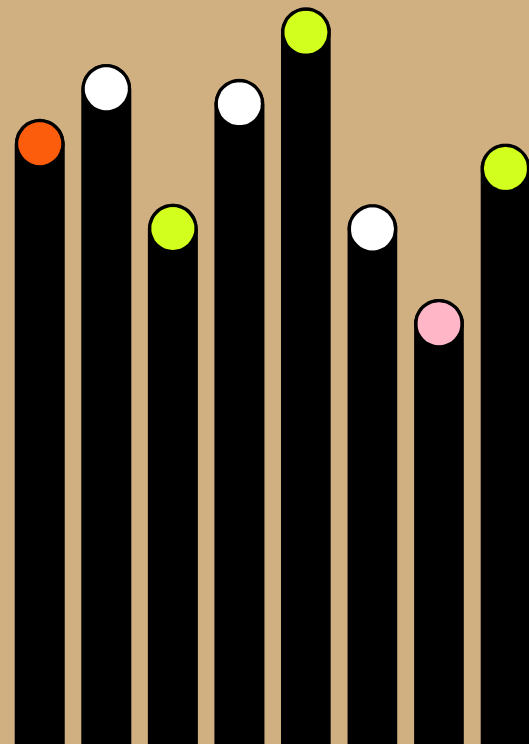


Next Stop: Advanced Automation

Fast-tracking Process Orchestration

Daniel Levy
VP Product Marketing, Camunda

Felix Mueller
Director Product Management, Camunda



Introductions



Daniel Levy

VP, Product Marketing
Camunda



Felix Mueller

Director, Product Management
Camunda



Themes from Earlier



Scaling Automation



Process Orchestration in Action



Innovation

“Process orchestration is critical both to **manage end-to-end customer journeys** and to **provide consistency of experience** to the human workforce.”

Gartner®, Emerging Tech Impact Radar: Hyperautomation | March 2023

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96% of decision makers agree:

Process Automation is the key to Digital Transformation.¹



But it's also the challenge.

Most organizations have more than five endpoints needed for automation:²



Human Work



AI



Business Rules



Micro Services



RPA



API



IoT



Systems
(legacy + homegrown)

Source: 2023 State of Process Orchestration Report. n = 755 IT decision makers from the US, UK, Germany, and France.

¹ Question: To what extent do you agree or disagree with the following statement: "Process automation is a vital element of digital transformation"?

² Question: Which of the following components are included as part of a typical process automation implementation within your organization?

Where we are today.

Transformation has accelerated and it has amplified the need for maturity in orchestration.

CCON
2023

Companies acted 20-40x faster
in implementing digitization
across the business.

What would have taken a year
took on average, just 11 days.

Source:

McKinsey & Company

How COVID-19 has pushed companies over the technology tipping point—and transformed business forever



Endpoints & Endpoints & Endpoints, Oh My!

Why Process Orchestration Maturity matters

Organizations who are not implementing process orchestration across these silos often experience:

- ✗ Broken or inefficient customer experiences
- ✗ Unnecessary inefficiency due to poorly identified, implemented, executed, and maintained processes
- ✗ An inability to measure effectiveness or continuously improve automated processes.

Organizations that are highly mature in their process orchestration:

- Marked improvements in customer experience, driving revenue opportunity
- Greater internal efficiency, lowering costs
- A higher degree of overall automation, driving digital transformation objectives

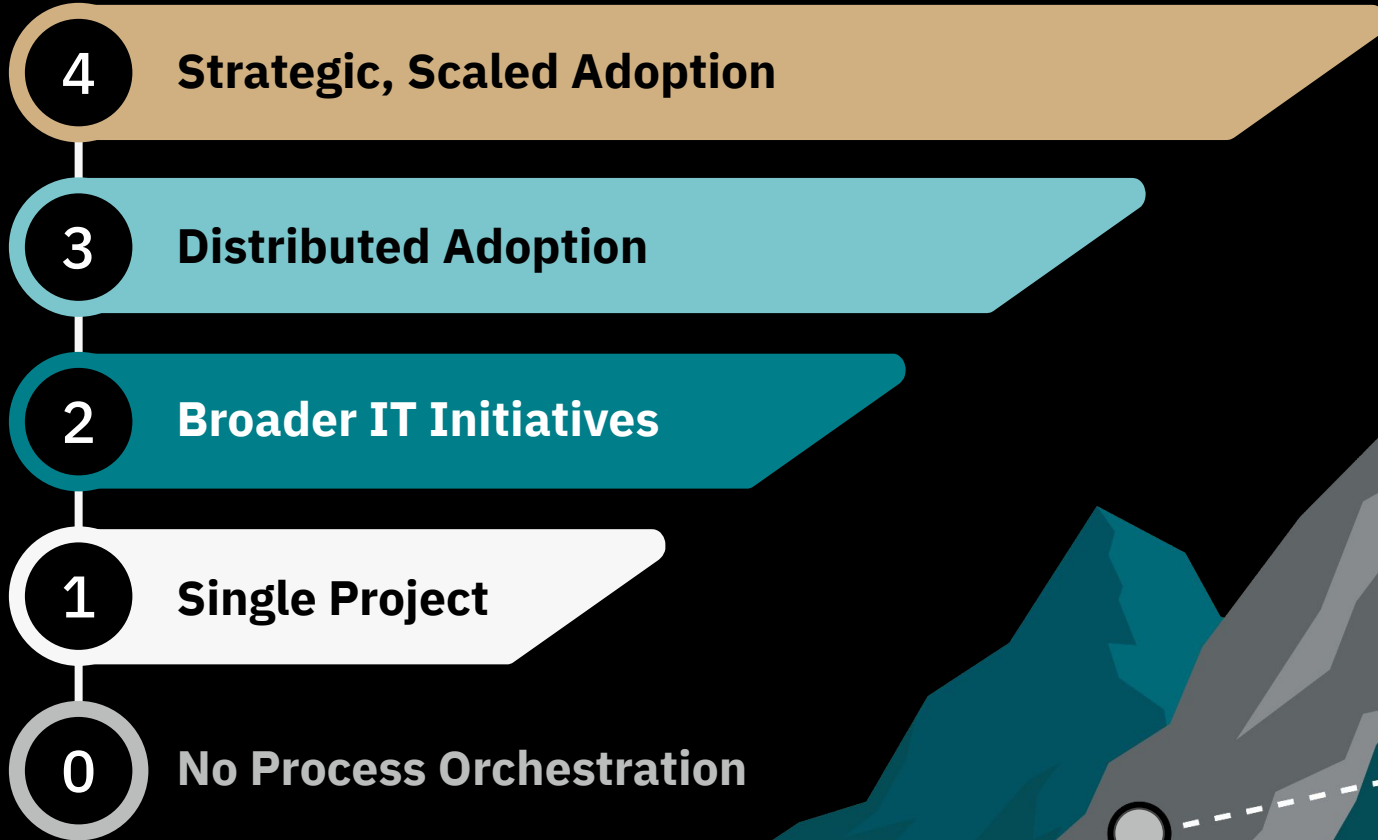


A Transformational Journey

CCON
2023



Process Orchestration Maturity Levels



Process Orchestration Maturity Drivers

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2023



Vision



Motivation



Structure



Measurement



Technology

No Process Orchestration

Vision



Some process elements may have automated components; they are too dispersed to be measured

Motivation



Interested in improving inefficient processes

Structure



IT team is not set up to centralize projects or resources

Measurement



Unable to accurately measure business value

Technology



May have implemented disparate automation technologies



Vision



Focused on single, mission-critical process orchestration projects

Motivation



Urgent need to “fix” broken/inefficient mission-critical process

Structure



Team often takes decentralized,

Measurement



Focused on completing single high-need projects

Technology



Legacy systems or monolithic on-premise solutions

- **Claims process is broken**
 - Lose information
 - Slow processing
 - No ability to share status of claim internally or externally
 - Customer satisfaction is at an all time low
- **Automobile Claims is the target for Phase 1**
 - Involves multiple departments and multiple systems (Claims, Policy Administration, Adjusters, Medical Review, and Accounting)
- **Where we can start**
 - Create an initial flow of connecting departments
 - Use out of the box connector where possible
 - Create initial forms to interact with humans
 - Start to provide status updates to customer to improve customer satisfaction

Demo

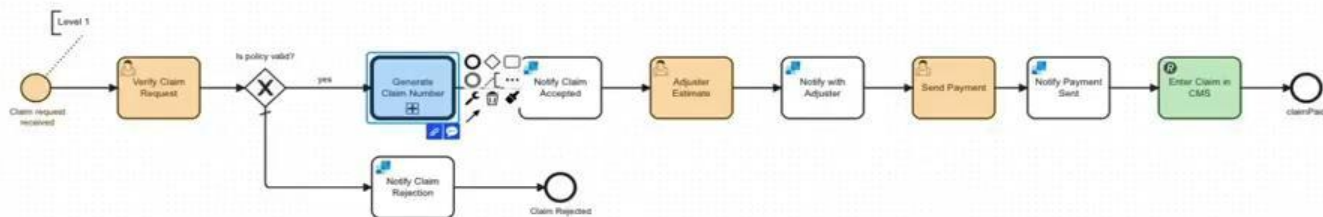
AutoClaims

Filter table

New

Name	Creator	Last changed
Business Rules	You	
Connectors	You	
Forms	You	
Generate Claim Number BPMN diagram	You	2023-09-13 11:25
Update Claimant BPMN diagram	You	2023-08-28 16:21
Claim Adjuster Flow BPMN diagram	You	2023-09-13 18:50
Auto Insurance Claim BPMN diagram	You	2023-08-28 13:34
Auto Insurance Claim - Phase 1 BPMN diagram	You	2023-09-13 11:56
Auto Insurance Claim - Phase 2 BPMN diagram	You	2023-09-13 18:53
phase3-auto-insurance-claim BPMN diagram	You	2023-09-12 13:16

New Start Form



Properties Comments

CALL ACTIVITY Generate Claim Number

General

Name
Generate Claim Number

ID
Activity_14rqcqm

Documentation

Element documentation

Details

Called element

Process ID *fx*
Process_generateClaimNumber

Input propagation

Inputs + 3

- > policyholderName
- > accidentDate
- > policyNumber

Output propagation

Outputs + 2

- > claimNumber
- > claimStatus

Extension properties

Example data

Problems

No problems found. You can deploy your diagram now.

Iterative Development

Vision



Broader, scaled-up initiatives are focused on better business outcomes

Motivation



Focused on driving critical business outcomes from process orchestration

Structure



IT teams want to empower business roles

Measurement



Measuring success for individual processes, but struggling to track KPIs

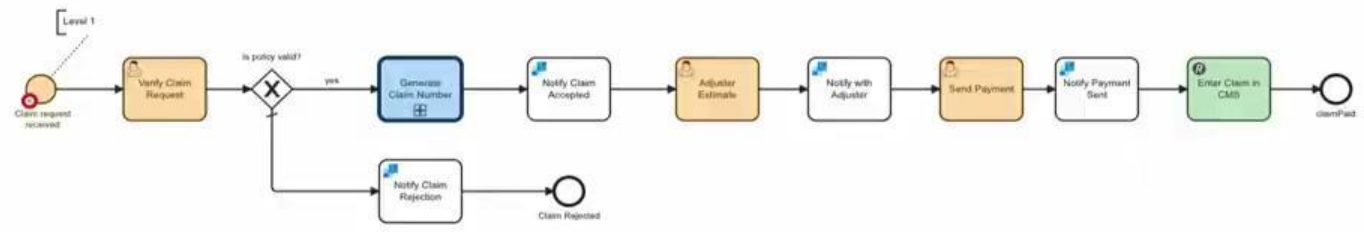
Technology



Building a technology stack that covers the entire process lifecycle

- For “CB Insurance”, phase 2 expands on what was previously designed:
 - + deeper collaboration w/ business
 - + business logic or rules to assign adjusters to claims based on their geographical location and other data
- Via additional discovery:
 - Example: We need access to medical records that might be associate with the claim, so we will implement something to notify the process that those files are ready to be reviewed
- Finally, we now have enough automation to start looking at KPIs and SLAs with some reports and dashboards

Demo



Properties Comments

PROCESS
Auto Insurance Claim

General

Name
Auto Insurance Claim

ID
Process_wgfs45f

Executable

Documentation

Element documentation

Extension properties

> <empty>

Example data

Example output

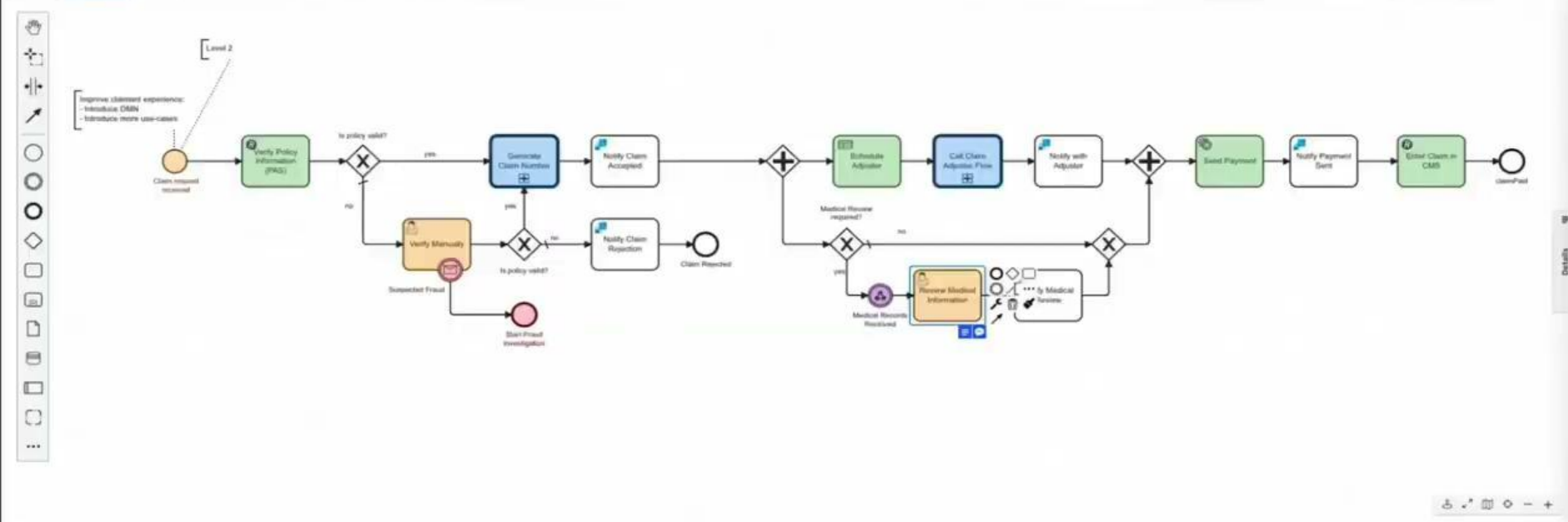
[About example data](#)

Problems 1

Claim request receiv... A <Start Event> with <User Task Form> is only supported by Camunda 8.3 or newer

Check problems against: Zeebe 8.2

**After collaboration with different
stakeholders**



Demonstrate Success with Camunda Optimize

Welcome, Joyce Johnson

Collections, Dashboards, and Reports

Search Filter Q F Create New

Name	Description	Contents	Modified By	Last modified
Claims Process Core Metrics		1 Dashboard, 14 Reports	Kevin Coronato	Aug 24, 2023
Process Performance Overview		1 Dashboard, 12 Reports	Kevin Coronato	Aug 24, 2023
Instant Preview Dashboard		1 Dashboard, 8 Reports	Kevin Coronato	Aug 24, 2023

Vision



Evolving toward process orchestration supporting organization-wide digital transformation

Motivation



Process orchestration drives strategic business outcomes, at scale and at a rapid pace

Structure



May have implemented a Center of Excellence (CoE) model or distributed team

Measurement



Starting to explore broader process orchestration KPIs

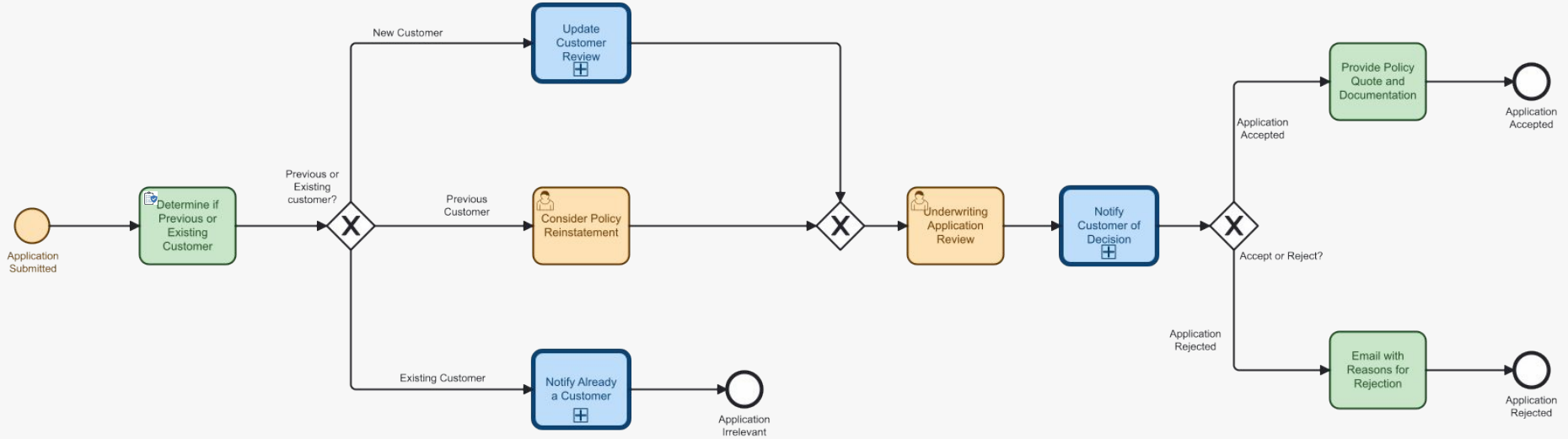
Technology



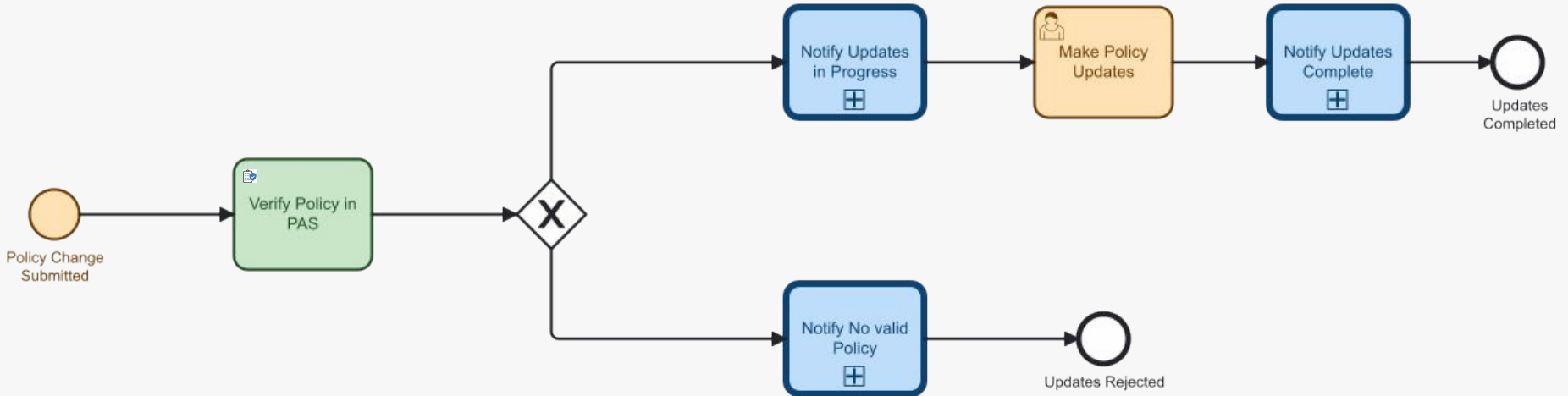
Enabling multiple teams to build process orchestration solutions at scale

- We start considering a CoE
- We expand at a rapid pace by
 - Reusing Connectors (using Connector Templates) across the enterprise
- Creating subprocesses that can be reused in different process flows
- Use “secrets” to store connector keys for ease of development and security

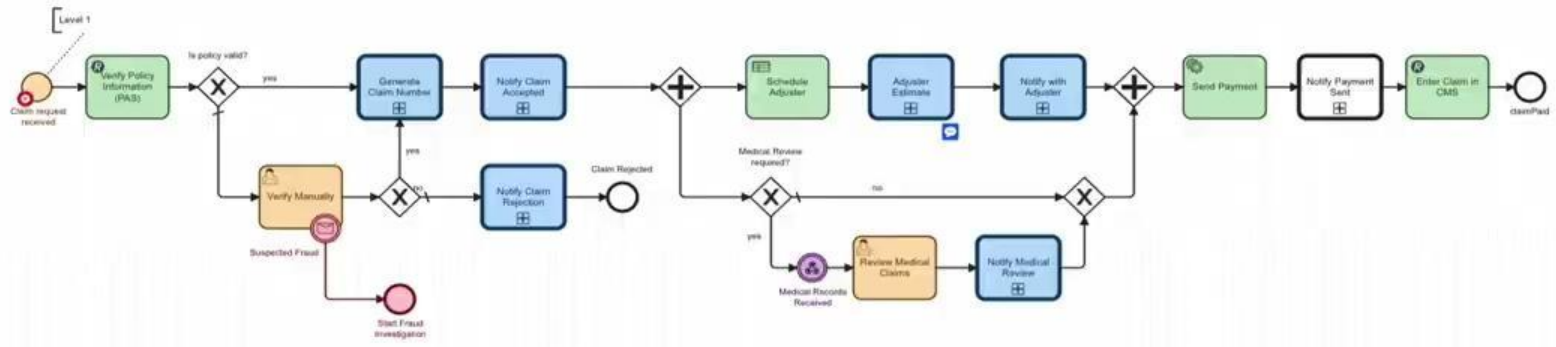
Customer Onboarding reusing PAS Connector and Notification Process



Policy Team reusing PAS Connector and Notification Process








How we got here



- Problems 2
- Claim request receiv... A <Start Event> with <User Task Form> is only supported by Camunda 8.3 or newer
- Gateway_1tjz6p4 Element is missing label/name

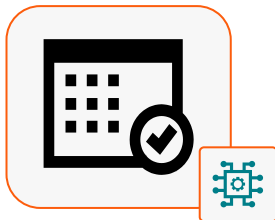


	No Process Orchestration	Single Project	Broader Initiative	Distributed Adoption	Strategic, Scaled Adoption
Vision 	Some process elements may have automated components; they are too dispersed to be measured	Focused on single, mission-critical process orchestration projects	Broader, scaled-up initiatives are focused on better business outcomes	Evolving toward process orchestration supporting organization-wide digital transformation	Clearly defined strategy around technology, methodology, and people to execute process orchestration at scale
Motivation 	Interested in improving inefficient processes	Urgent need to “fix” broken/inefficient mission-critical process	Focused on driving critical business outcomes from process orchestration	Process orchestration drives strategic business outcomes, at scale and at a rapid pace	Demonstrated track record of delivering strategic value to organization through process orchestration
Structure 	IT team is not set up to centralize projects or resources	Team often takes decentralized,	IT teams want to empower business roles	May have implemented a Center of Excellence (CoE) model or distributed team	Global COEs provide enablement, training, internal consulting, and connector development for process orchestration
Measurement 	Unable to accurately measure business value	Focused on completing single high-need projects	Measuring success for individual processes, but struggling to track KPIs	Starting to explore broader process orchestration KPIs	Defining and measuring large-scale process orchestration KPIs
Technology 	May have implemented disparate automation technologies	Legacy systems or monolithic on-premise solutions	Building a technology stack that covers the entire process lifecycle	Enabling multiple teams to build process orchestration solutions at scale	Has built a tech stack that fits their exact needs and has a dedicated process orchestration strategy



Solution Acceleration

Innovation that accelerates time to value



AI Powered

Create Solutions Fast

Accelerate domain, process and technical experts to build solutions fast

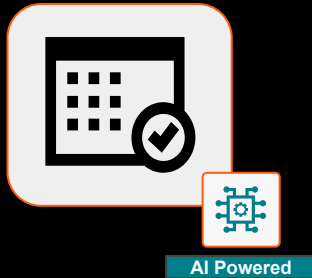


Empower Teams Quickly

Bootstrap any team in the organisation quickly to create solutions in a robust, reliable and consistent manner

Scaling teams to create solutions fast

Speed up time-to-automation to solve complex business problems



Create Solutions Fast

Accelerate domain, process and technical experts to build solutions fast



Accelerated Development Lifecycle

Accelerate the journey from identifying a business problem to delivering a fully documented and governed automation solution.

Collaboratively create, debug, and publish process applications with a unified view of business and execution diagrams.



Accelerated Connectivity

Utilize out-of-the-box Connectors from our curated marketplace or quickly create reusable Connectors.

Easily share them through public or private marketplaces, streamlining your automation journey with speed, ease-of-use, and reusability, while minimizing maintenance requirements.

Internal Marketplace

CCON
2023

Modeler

Home

Acme Corp.   

Welcome to Camunda, Lisa!

This is the Modeler projects and organization resources overview.

Projects  **Organization resources** 

This is an overview of available organization resources published by the organization owner. [Learn more.](#)

[Reset filters](#)

 Search for a resource

Creator

- Internal
- Camunda
- Partner
- Community

Version compatible

- Zeebe 8.2+
- Zeebe 8.3+

Resource

- Connectors
- Forms
- Process template



GitHub Connectors
[By Camunda](#)

Create and modify issues, repositories, comments, and releases on GitHub. Or start process instances on GitHub events.

[Documentation](#)



Amazon DynamoDB Connector
[By Camunda](#)

Create and modify issues, repositories, comments, and releases on GitHub. Or start process instances on GitHub events.

[Documentation](#)



Know Your Customer (KYC) Process
[By Camunda](#)

Our "Know Your Customer (KYC) Process" is a thorough system designed to accurately identify and verify the credentials of our customers. Ensuring compliance with regulatory standards, this procedure emphasizes accuracy, security, and efficiency. It plays a pivotal role in preventing fraudulent activities...



RPA Bot Incident Management
[By Camunda](#)

Our "RPA Bot Incident Management Protocol" addresses unexpected disruptions or malfunctions affecting our automated processes. With an



Customer Onboarding form
[By Camunda](#)

Our "Customer Onboarding UI Form" streamlines the entry and assimilation of new clients into our system. Designed with user-friendliness in mind, it



Idea Submission Form
[By Camunda](#)

Our "Idea Submission Interface" provides a platform for users, be it employees or external partners, to contribute innovative ideas that can

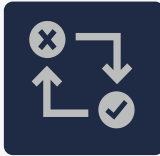
Predictive Process Orchestration

Improve processes + decisions target with AI



ML Ready Data Set

Leverage process instance information with ML and ready to use data sets



Intelligent Process Improvements

Auto generate process improvements identifying patterns and bottlenecks in BPMN models



Improve Business Process

Improve specific business use cases with customisable ML data sets



Intelligent Decisioning (DMN)

Improve decisioning with intelligent recommendations for DMN tables

Empower more teams to automate

Onboard, manage, and scale 1000s of projects



Empower Teams Quickly

Bootstrap any team in the organisation quickly to create solutions in a robust, reliable and consistent manner



Flexible Architecture

Camunda enables you to easily meet your security, compliance, and governance requirements, with a highly configurable architecture.

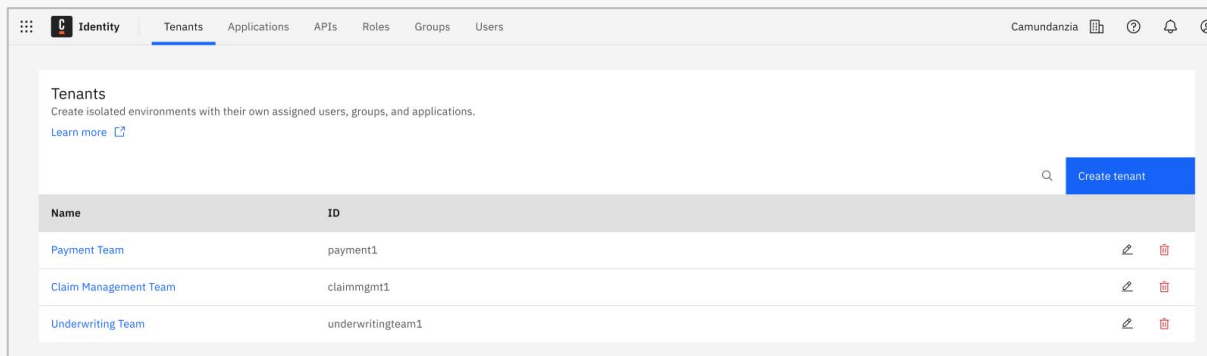


Cloud Ready







Leverage managed services from Camunda, build your own with self managed platforms or take a hybrid route with options to structure tenants for the business.

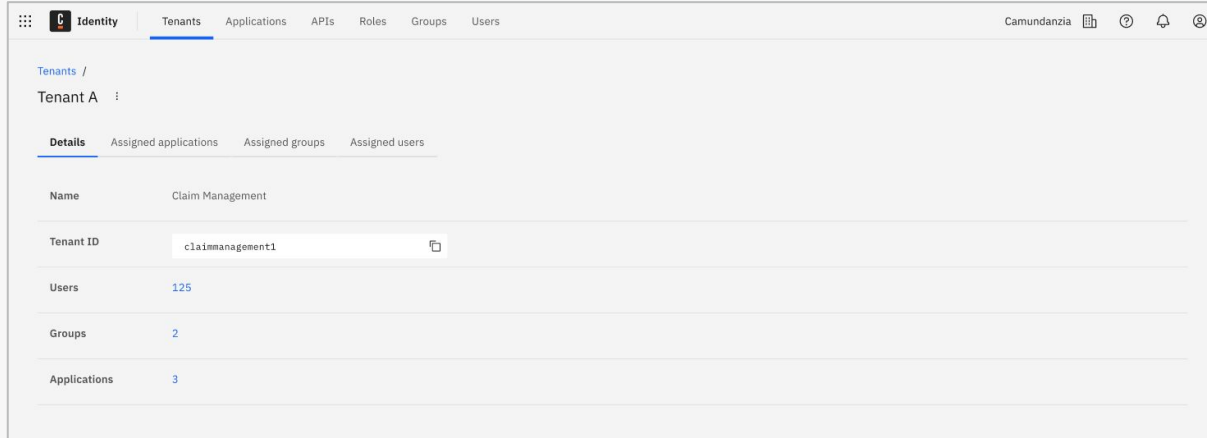
Multi-Tenancy

Onboarding of new Teams within minutes




The screenshot shows the Microsoft Identity Tenants management console. The top navigation bar includes "Identity", "Tenants", "Applications", "APIs", "Roles", "Groups", and "Users". The current page is titled "Tenants" and contains the following text: "Create isolated environments with their own assigned users, groups, and applications." Below this is a "Learn more" link and a "Create tenant" button. A table lists the existing tenants:

Name	ID	
Payment Team	payment1	 
Claim Management Team	claimmgmt1	 
Underwriting Team	underwritingteam1	 



The screenshot shows the details page for a specific tenant, "Tenant A". The top navigation bar is the same as the previous screenshot. The page title is "Tenants / Tenant A". Below the title are tabs for "Details", "Assigned applications", "Assigned groups", and "Assigned users". The "Details" tab is active and shows the following information:

Name	Claim Management
Tenant ID	claimmanagement1 
Users	125
Groups	2
Applications	3

Deploy process via Web Modeler

The screenshot displays the Web Modeler interface for a process titled "Car Claim Settlement". The interface includes a top navigation bar with "Home", "Claim Management", and "Car Claim Settlement". Below this, there are tabs for "Design", "Implement", and "Play", with "Autosaved at 11:24:48" and buttons for "Deploy" and "Run".

The main workspace shows a BPMN diagram with the following elements:

- Start event: "Claim Request Received"
- Task: "Verify Policy (PNC)"
- Decision: "is policy valid?"
- Task: "Generate Claim Number"
- Task: "Notify Claim Receiver"
- Decision: "is policy valid?"
- Task: "Notify Claim Receiver"
- End event: "Claim Reported"
- Task: "Medical Review Request"
- Decision: "Medical Review Request?"
- Task: "Assign Medical Information"
- Task: "Notify Medical Review"
- Decision: "Medical Review Received?"
- Task: "Evaluate Calculator"
- Task: "Calculate Claim Amount"
- Task: "Notify MHA Claims"
- Decision: "Medical Review Received?"
- Task: "Assign Medical Information"
- Task: "Notify Medical Review"

A "Deploy diagram" dialog box is open, titled "Select a tenant and Cluster". It contains the following information:

- Tenant: Claim Management
- Cluster:
 - Staging Cluster (Zeebe 8.1.3) Healthy
901f0dea-bc7a-4e0d-8be5-48a62db27232
 - Development Cluster (Zeebe 8.1.3) Healthy
901f0dea-bc7a-4e0d-8be5-48a62db27232

Buttons for "Cancel" and "Deploy" are at the bottom of the dialog.

Operate and Multi-Tenancy

Operate
Dashboard Processes Decisions
Camundanzia

Filters

Tenant
Claim Management

Process
Car Claim Settlement

Version
2

Flow Node
Search by Process Flow Node

Instance States

Running Instances

- Active
- Incidents

Finished Instances

- Completed
- Canceled

[More Filters](#)

[Reset filters](#)

Car Claim Settlement
Car-Claim-Settlement
Modify Delete

```

graph LR
    Start((Claim request received)) --> Task1[Verify Policy Information (PMS)]
    Task1 --> Decision1{Is policy valid?}
    Decision1 -- yes --> Task2[Generate Claim Number]
    Decision1 -- no --> Task3[Verify Manually]
    Task3 --> Decision2{Is policy valid?}
    Decision2 -- yes --> Task2
    Decision2 -- no --> Task4[Claim Rejected]
    Task2 --> Task5[Notify Claim Accepted]
    Task5 --> Merge1(( ))
    Task4 --> Merge1
    Merge1 --> Task6[Schedule Adjuster]
    Task6 --> Task7[Call Claim Adjuster First]
    Task7 --> Task8[Notify With Adjuster]
    Task8 --> Decision3{Medical Review required?}
    Decision3 -- yes --> Task9[Review Medical Information]
    Task9 --> Task10[Notify Medical Review]
    Decision3 -- no --> Merge2(( ))
    Task10 --> Merge2
    Task8 --> Merge2
    Merge2 --> Task11[Send Payment]
    Task11 --> Task12[Notify Payment Sent]
    Task12 --> Task13[Enter Claim in CRM]
    Task13 --> End((Claim Paid))
                    
```

Process Instances - 16 results found

<input type="checkbox"/>	Name	Process Instance Key	Version	Tenant	Start Date	End Date	Parent Process Instance key	Operations
<input type="checkbox"/>	Car Claim Set...	2234567890987234	2	Claim Mana...	2023-03-20 11:31:02	--	2234567890987654	
<input type="checkbox"/>	Car Claim Set...	2234567890987234	2	Claim Mana...	2023-03-20 11:31:02	--	2234567890987654	
<input type="checkbox"/>	Car Claim Set...	2234567890987234	2	Claim Mana...	2023-03-20 11:31:02	--	2234567890987654	
<input type="checkbox"/>	Car Claim Set...	2234567890987234	2	Claim Mana...	2023-03-20 11:31:02	--	2234567890987654	
<input type="checkbox"/>	Car Claim Set...	2234567890987234	2	Claim Mana...	2023-03-20 11:31:02	--	2234567890987654	
<input type="checkbox"/>	Car Claim Set...	2234567890987234	2	Claim Mana...	2023-03-20 11:31:02	--	2234567890987654	
<input type="checkbox"/>	Car Claim Set...	2234567890987234	2	Claim Mana...	2023-03-20 11:31:02	--	2234567890987654	
<input type="checkbox"/>	Car Claim Set...	2234567890987234	2	Claim Mana...	2023-03-20 11:31:02	--	2234567890987654	
<input type="checkbox"/>	Car Claim Set...	2234567890987234	2	Claim Mana...	2023-03-20 11:31:02	--	2234567890987654	

Console Self-Managed

Console		Clusters		Self-Managed
Modeler	^			
Tasklist	^			
Payment Cluster		Generation	Status	
Claim Cluster		8.2.10	Healthy	
Operate	^	8.2.11	Healthy	
Payment Cluster				
Claim Cluster				
Optimize	^			
Identity	^			

Plan details

Updated on September 14, 2023 at 06:00 AM (UTC + 1)

Plan
Enterprise Renews
June 08, 2025

Usage alerts

Alerts are sent via email and in-app messages the day after thresholds are met.

[View change history](#)

Metric	Usage threshold	Status	
Process instances	80%	Off	Edit alert
Decision instances	80%	Off	Edit alert

Current billing period usage

June 08, 2024 - June 07, 2025

General users

4 users

Process instances

500,000

Decision instances

0

Task users

0 users

Clusters

Type	Used	Total reserved
S Cluster	2	3

Usage history

Updated on September 14, 2023 at 06:00 AM (UTC + 1)

[Table view](#) [Chart view](#)

Group By Monthly Period

Period	Process Instances	Decision Instances	Task Users
September 08, 2023 - October 07, 2023	0	0	0
August 08, 2023 - September 07, 2023	0	0	0
July 08, 2023 - August 07, 2023	0	0	0
June 08, 2023 - July 07, 2023	0	0	0

Quickpoll via Slido

Assessing your process orchestration maturity

Questions?

September 28: Conference Day 2

Times shown reflect the user's own timezone. Toggle the switch to view original event timezone.

Switch to original event timezone

06:30am -
07:30am
(UTC-04:00)

Morning Run

Wanna join the Camunda Co-founder Bernd Rucker and one of our Camunda Champions for a light morning run (~5km)? Meet us at 6.20am at the lobby at The Hoxton, Williamsburg, Wythe Avenue, Brooklyn, NY, USA. Enjoy!

*And remember, it's never too late to get started with running or
Process Orchestration Maturity*

Join Bernd for tomorrow morning's run!



*Read more about the Process
Orchestration Maturity Model*

Thank You!