BACKGROUNDER

Optimizing process efficiency with task mining

"Data and analytics leaders responsible for implementing artificial intelligence techniques and digital business transformations should identify desktop-level inefficiencies and task automation opportunities by using task mining tools."

Gartner, Task Mining Market Guide 2022

Task mining: The What? and The How?

Task mining allows businesses to understand the way they handle tasks by monitoring user interactions to give a more in-depth look at processes than other technologies. This detailed understanding can help companies optimize productivity through improved efficiency. Task mining shares similarities with process mining, but it leverages user interaction data instead of business metrics and log files to analyze processes.

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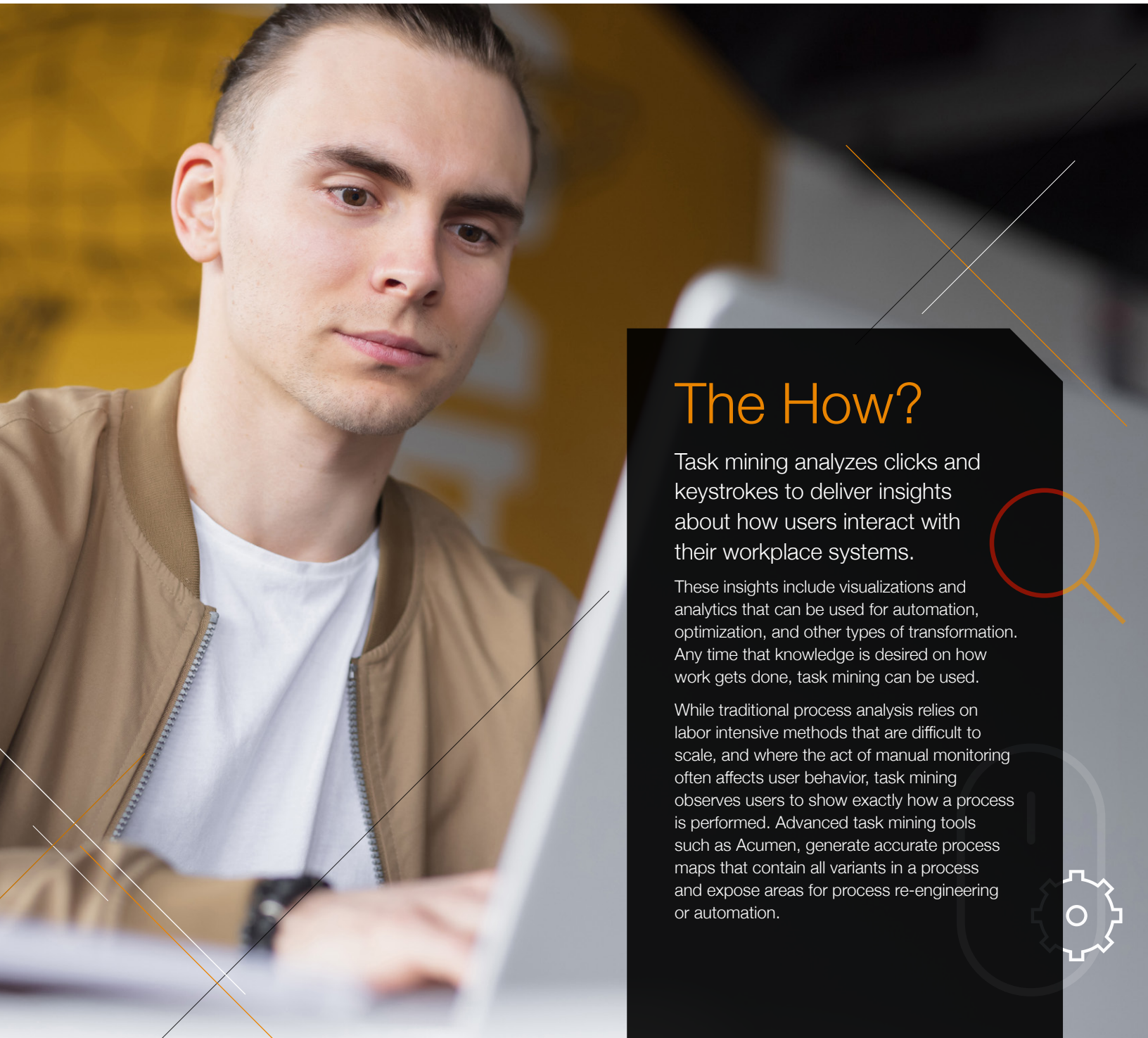
What is task mining?

Task mining is an innovative technology that enables companies to understand how they perform their tasks by monitoring user actions and collecting user interaction data. From the insights gained, businesses can observe how they handle processes, identify the most common mistakes while performing tasks, and discover tasks that can be automated. As a result, it is a way to improve business processes and enhancing automation.

This way, companies can see how they perform their tasks and measure how well they perform those tasks. With this assessment, businesses can improve their performance metrics by…

- Identifying best practice and why some tasks are performed inefficiently
- Identify the most common errors and train employees to avoid them
- Discover automation opportunities

Acumen provides task mining capabilities that deliver granular insights to enable those responsible for operational excellence to assess the overall productivity of employees through the dashboards it automatically generates after collecting data on workforce-system interactions.



The How?

Task mining analyzes clicks and keystrokes to deliver insights about how users interact with their workplace systems.

These insights include visualizations and analytics that can be used for automation, optimization, and other types of transformation. Any time that knowledge is desired on how work gets done, task mining can be used.

While traditional process analysis relies on labor intensive methods that are difficult to scale, and where the act of manual monitoring often affects user behavior, task mining observes users to show exactly how a process is performed. Advanced task mining tools such as Acumen, generate accurate process maps that contain all variants in a process and expose areas for process re-engineering or automation.

Task mining or process mining?

The main difference between the two approaches is the definition of the process. While process mining maps and collects data across the company to provide insight into end-to-end processes, task mining focuses on how an employee moves through each application while processing requests, allowing you to see how specific positions and teams are performing in actual operations.

Process mining needs to be connected to core systems and application databases, then data structures and keys need to be defined to connect the data. If you have many systems in your company, and employees use most of them to process one client request, this means you need to examine logs from all these systems and link them to each other unambiguously. Unfortunately, this places a significant burden and dependency on the IT department for this whole operation, whether it be from architects or direct analysts and programmers of individual applications.

Task mining, on the other hand, pulls the information needed for process mapping not from the logs of the core systems but directly from the operating system of a particular machine. In addition, the system records how an employee traverses each application as it processes requests, so you have near-real-time data from real traffic.

The outputs are also very different and show that while both categories pull data from internal systems to improve processes, they are very different in scope. Task mining provides a very detailed view with granularity of data down to the level of the specific employee, the particular task, and screens or objects in the internal system. But that is not where it ends. It will also give companies a scope of all their teams but focuses primarily on the employee, their work and the employee experience.

Based on the simplicity of implementation, availability of measured data detail, the flexibility of the solution, and versatility of use, many teams find task mining to be a better option.

The Why? – Use cases for task mining

In any type of process improvement, the first step is gaining a thorough understanding of the as-is state. No technology is better for this than task mining.

Analytics and Optimization: task mining guides optimization efforts by calculating detailed granular metrics and identifying steps in a process that are ripe for improvement.

- **Analytics:** average handle time, handle time distribution, time spent per application, structured data percentage, variance, and many other metrics can be calculated using task mining.
  - Least efficient journey time.
  - Average journey time.
  - Optimum journey time.
  - Number of people taking various routes: least efficient vs average vs optimum journey.
  - Total time of various routes.
  - Potential time savings by conforming team to optimum journey.
  - Being able to report on, dissect and view this data by role, team, department, location.
- **Improvement identification:** task mining can identify the non-standardized parts of a process and process bottlenecks, helping teams quickly identify non compliance and where there are opportunities for process standardization or improvement.

Automation: a key application of task mining is scaling enterprise automation. Three key automation challenges that task mining helps with are discovery, speed, and quality.

- **Discovery:** automation teams struggle to identify the right opportunities and prioritize them based on impact and effort; task mining solves this by calculating key metrics that help with identifying automation opportunities.
- **Speed:** mapping processes is a highly manual process and development lead times are long due to inaccurate, incomplete, or hard to use requirements documents; task mining solves this by automatically identifying User Journeys and generating process application flow charts from the data automatically.
- **Quality:** Today, most organizations and consulting companies invest significant time and expense attempting to manually capture task flow or ‘User Journeys’. This often leads to inconsistent measurement, can be error prone as employees adapt behaviour when under review, and does not scale leading to an incomplete picture and potentially inaccurate conclusions when analysing disparate teams in different locations.

Improving individual and team performance in process delivery: managers and coaches have information on how to best help their colleagues.

- Identifying which team members are in need of support and putting in place actions to help develop skills or understanding by organizing training, adapting procedural materials, or improving the knowledge base, for example.

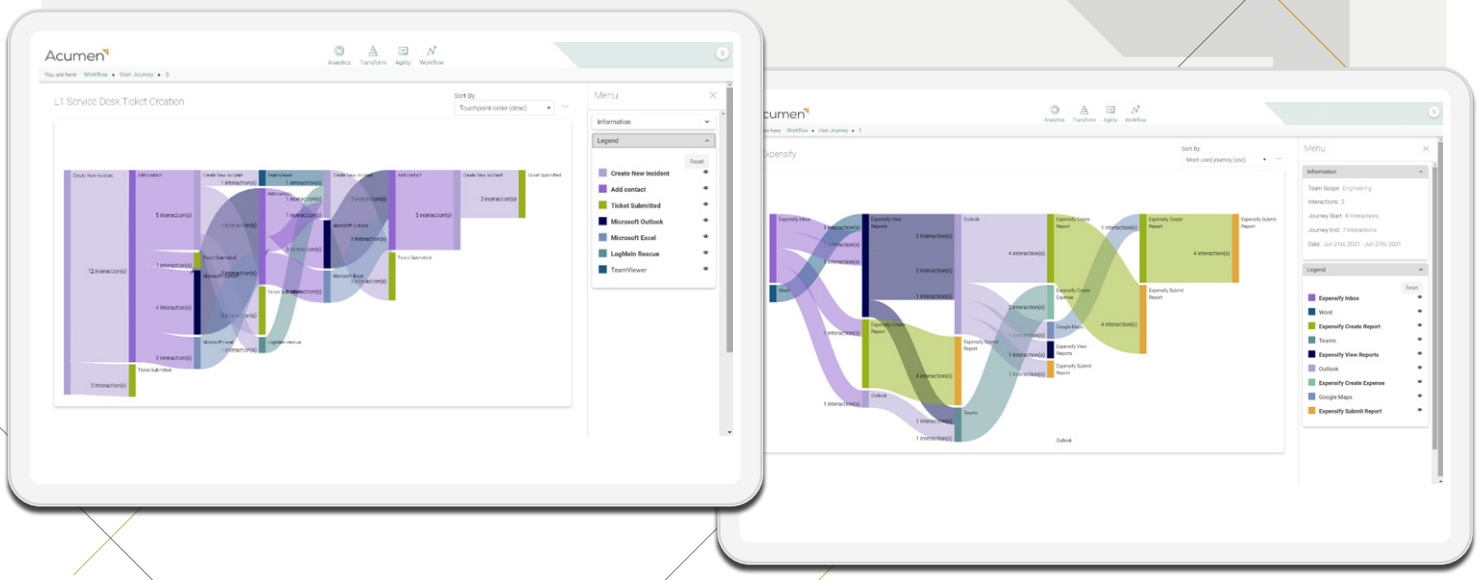
Acumen Task Mining: insight for process optimization

Thanks to the level of detail that Acumen provides, it is easy for team leaders and managers to identify best practices and bottlenecks and potential causes of inefficiency. What used to be detective work can become automated insights about team performance.

Acumen's task mining capabilities are delivered through its 'User Journey' tracking feature that digitally collects, compiles, and presents thousands of user journeys, without human intervention across numerous personnel in numerous locations. This automated approach to data gathering substantially reduces the time for the process improvement undertaking, eliminates contentious data management risks, removes data gathering biases, and improves data useability.

Acumen presents the aggregate user journeys in an easy to understand Sankey diagram, depicting not only the relevant volumes of the various process flows, but also the step by step processes followed by the employees undertaking the process tasks. This granular analysis of tasks allows operations personnel to quickly identify deviations from the optimum process as determined by them. It quickly exposes ny elements of digital friction, such as application switching issue, allowing application teams to understand where the bottle necks are giving the appropriate insight to enable them to address the issues and improve productivity and the user experience.

User Journey configuration is as simple as stating the first and last steps, and one intermediate point, in the journey. For example, the opening of the application screen as a starting point, and the submission of the completed application as the ending point of the journey.



About Scalable…

Founded in 2008, Scalable Software delivers comprehensive, granular and intelligent analytics tools that give organisations a real-time business lens to improve digital agility and empower employees to thrive. Its workplace analytics platform, Acumen, enables organisations to measure, optimise and transform the employee experience.

Acumen collates and distils data using agent and agentless discovery from across an organisation's technology infrastructure. Using a blend of digital KPIs and metrics, insights are delivered to leadership, IT and HR teams, giving them deep visibility into how the hybrid working model is performing. Armed with this knowledge, organisations can drive digital agility – by protecting employee wellbeing, optimising the digital experience, boosting employee success, and reducing complexity and cost.

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