

Course : Design and Lead the Optimization of Business Processes Using AI

From Process Mapping to Intelligent Automation

Practical course - 2d - 14h00 - Ref. AAZ

Price : 1620 CHF E.T.

NEW

Artificial intelligence is profoundly transforming the way organizations operate by offering new opportunities to optimize business processes. Beyond traditional automation, generative AI, document-based AI, and intelligent agent technologies now make it possible to improve operational performance, service quality, and the employee experience. This training course provides a structured methodology for analyzing existing processes, identifying value-creation levers, and designing automation solutions tailored to business challenges.

Teaching objectives

At the end of the training, the participant will be able to:

- ✓ Map a business process and identify activities that can be automated or enhanced by AI
- ✓ Select the technologies best suited to different use cases: RPA, IDP, generative AI, and AI agents
- ✓ Evaluate and prioritize optimization opportunities based on criteria such as value, feasibility, and risk
- ✓ Design a target process that incorporates automation and AI-powered assistance capabilities
- ✓ Develop a business case and define performance metrics for an AI-driven optimization project

Intended audience

Business managers, transformation leaders, continuous improvement leaders, process managers, project managers, consultants, business analysts, innovation leaders, and data or IT managers involved in process optimization projects.

Prerequisites

None

PARTICIPANTS

Business managers, transformation leaders, continuous improvement leaders, process managers, project managers, consultants, business analysts, innovation leaders, and data or IT managers involved in process optimization projects.

PREREQUISITES

None

TRAINER QUALIFICATIONS

The experts leading the training are specialists in the covered subjects. They have been approved by our instructional teams for both their professional knowledge and their teaching ability, for each course they teach. They have at least five to ten years of experience in their field and hold (or have held) decision-making positions in companies.

ASSESSMENT TERMS

The trainer evaluates each participant's academic progress throughout the training using multiple choice, scenarios, hands-on work and more. Participants also complete a placement test before and after the course to measure the skills they've developed.

Practical details

A mix of lectures, demonstrations, case studies, and hands-on workshops. Use of examples from key business areas (finance, HR, procurement, customer relations, operations). Process mapping models, analysis matrices, and decision-making tools. Individual, pair, and small-group assignments that promote collaborative learning.

Course schedule

1 Understanding the Leverage Points for Process Optimization Using AI

- Identify the different families of business processes and their characteristics
- Distinguishing Between Automation, Digitization, Augmentation, and Transformation Through AI
- Understanding the respective contributions of Robotic Process Automation (RPA), Intelligent Document Processing (IDP), generative AI, and AI agents
- Analyze the criteria for determining the suitability of a smart automation project
- Identify the expected benefits in terms of productivity, quality, compliance, and user experience

Hands-on work

Collective analysis of several processes from support functions (HR, finance, customer relations, procurement). Working in small groups, participants identify manual, repetitive, decision-making, or documentation-related tasks and assess their potential for automation or enhancement through AI. Cross-group feedback and a guided discussion on the technologies best suited to each situation.

2 Mapping and Analyzing a Business Process

- Break down a process into activities, stakeholders, data, and information systems
- Use the main process mapping tools: SIPOC, BPMN, flowcharts
- Identify operational irritants, bottlenecks, and activities that do not add value
- Analyze the document flows and information flows involved in the process
- Assess digital maturity and the associated organizational constraints

Hands-on work

Working in pairs, participants will create a detailed map of a business process based on a provided case study or a real-life situation brought by the participants. They will construct a process diagram, identify pain points, and assess opportunities for improvement. The session will conclude with a group debriefing that includes methodological recommendations.

TEACHING AIDS AND TECHNICAL RESOURCES

- The main teaching aids and instructional methods used in the training are audiovisual aids, documentation and course material, hands-on application exercises and corrected exercises for practical training courses, case studies and coverage of real cases for training seminars.
- At the end of each course or seminar, ORSYS provides participants with a course evaluation questionnaire that is analysed by our instructional teams.
- A check-in sheet for each half-day of attendance is provided at the end of the training, along with a course completion certificate if the trainee attended the entire session.

TERMS AND DEADLINES

Registration must be completed 24 hours before the start of the training.

ACCESSIBILITY FOR PEOPLE WITH DISABILITIES

Do you need special accessibility accommodations? Contact Mrs. Fosse, Disability Manager, at psh-accueil@orsys.fr to review your request and its feasibility.

3 Identify and prioritize use cases for intelligent automation

- Mapping AI technologies to different types of tasks and processes
- Identify activities that fall under RPA, IDP, generative AI, or AI agents
- Assess the technical, organizational, and regulatory feasibility of use cases
- Assess the potential impacts on costs, timelines, quality, and user satisfaction
- Create a prioritization matrix to select the most relevant initiatives

Hands-on work

Group case study. Using a portfolio of processes, participants identify opportunities for optimization, estimate potential gains, and plot each initiative on an impact/feasibility matrix. Development of an initial AI project backlog and a well-reasoned presentation to the group.

4 Design an AI-Enhanced Target Process

- Define a target process that incorporates automation and intelligent assistance capabilities
- Distribute roles among employees, automated systems, and AI agents
- Formalize the rules for governance, oversight, and human oversight
- Incorporate requirements related to data quality, security, and compliance
- Prepare for change management with business and technical stakeholders

Hands-on work

Design workshop in small groups. Participants develop the target process for a business case by integrating various technological components (RPA, generative AI, document processing, conversational agent). Creation of a target diagram, definition of human-machine interactions, and simulation of a project validation committee meeting.

5 Lead the rollout and measure the value created

- Define the performance metrics and success criteria for an optimization project
- Develop a business case that takes into account costs, benefits, and return on investment
- Measure the gains achieved using operational and financial metrics
- Organize performance monitoring and continuous process improvement
- Prepare for scaling up and the widespread adoption of best practices

Hands-on work

Individual case study followed by a group presentation. Each participant develops a simplified business case based on an intelligent automation project. This involves calculating potential gains, defining KPIs, identifying risks, and preparing a decision-making proposal for senior management. Presentation and feedback from the instructor.

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Dates and locations

REMOTE CLASS

2026 : 7 Dec.

2027 : 1 Mar., 10 June, 20 Sep., 2 Dec.