



How to Build an **Automation Center of Excellence**

A practical framework for scaling digital automation that delivers business value, built from the lessons of real-life enterprise CoE engagements.

For Digital & Transformation Leaders

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Introduction

"Every Center of Excellence I've helped build has come back to the same starting point: understand your scope, and make sure it's aligned to the strategic direction of the organisation it serves. Without that, the rest is noise.

From there, three things matter most.

- 1. Cover the whole value chain: from demand, through design and build, all the way to tracking value after deployment.*
- 2. Keep a continuous, prioritised pipeline of work: Keep refreshing it constantly, made up of boulders, rocks and pebbles so you always have the agility to move.*
- 3. Design for reusability from day one: you do not want to be building everything from scratch.*

But the true north of all of it is the business outcome. Not 'I'm going to build a claims process,' but what is that for, and will it create measurable benefit? This is a human business too — and the human touch can never be forgotten.

Think big. Start small. Move fast. That's how you build a CoE that lasts. Follow this guide to help you establish your automation CoE, and remember you can always reach out to Bizagi if you need additional help."

Alex George,
Enterprise Account Directory, Bizagi

This is the condensed playbook Bizagi uses with enterprises building, or rescuing, their automation CoE. It distils the patterns we've seen across financial services, insurance, energy, health-care and government engagements into an actionable methodology you can apply right away to see tangible results.

Real-world results from enterprise automation COEs



Premium financial services group deployed over 900 processes, created from just 5 core processes through repeatable COE.



45 process areas mapped end-to-end by process engineering CoE, with AI capabilities now being deployed.

Global Consumer Goods Manufacturer

CoE helped with 50% faster delivery time, with the cost to build new workflows decreased by more than 70%.

"Think big, but start small and move fast."
Alex George, Bizagi



Who this is for:

COOs, CIOs, transformation directors, automation leads and BPM managers who need to move from one-off automations to a scalable, governed, value-driven capability.



What you'll take away

- A clear definition of what a CoE is
- A snapshot overview of what makes a successful COE
- The 8 core principles for successful COE establishment
- Building blocks to establish a sustainable COE
- The SPARK methodology to go from quick win to enterprise scale.
- A 10-point self-assessment you can run against your own CoE.

What, exactly, is a Center of Excellence?

An automation Center of Excellence (CoE) is a dedicated team with the right skills, tools, methodology and mandate to drive value through digital automation.

They may be part of a single team or business unit, or they may be distributed across the business.

The Center of Excellence helps to drive business outcomes:

- **Efficiency:** reducing time, cost and effort across processes
- **Productivity:** freeing people to focus on higher-value work
- **Innovation:** testing new digital propositions safely and fast
- **Customer & employee experience:** reducing friction across journeys
- **Compliance & regulatory adherence:** embedding rules into processes by design.

It enables this through:



Business **stakeholder management & engagement**



Clear **business outcomes** for all solutions



Providing **governance**



Enabling **benefit realization** through setting **KPIs and tracking** metrics



Ensuring **re-usability** throughout the design cycles



Maintaining **best practice standards**

"This is a human business, and the human touch can never be forgotten. The management of your internal stakeholders is absolutely key."

The COE Snapshot: Key success factors

"First and foremost: understand the scope of your CoE. What is its primary purpose and outcome, and ensure it's aligned to the strategic objectives of the organisation it's serving."

1 Create a fusion team (Business and IT)

Business analysis team collaborates with IT as single delivery capability

Continuous Improvement

- Business architect
- Business analyst / process designer

IT Delivery

- Enterprise architect
- Automation developer
- Automation specialist
- Data analyst

2 Establish clear roles

Both internal and external roles defined to drive demand and business impact

- Internal resources with networking and credibility from business users – managed by continuous improvement business team
- Internal capability or potentially outsourced to one or more partners – managed by IT & Build team

3 Create an automation road map

Establish a roadmap of agile and continuous value delivery through assessment and prioritization.

See Bizagi resources for process prioritization matrix tool.

4 Create a clear prioritization matrix

Ensure the Matrix is simple, effective and repeatable for all audiences, considering the impact on key business objectives, as well as the effort required.

5 Create reusability matrix

Reusable components help to save effort and resources, scale fast and see tangible results sooner.

6 Manage internal stakeholders

Ensure ongoing success with frequent updates, such as bi-weekly stakeholder meetings, weekly demos during new process development phases and ongoing engagement.

8 Core Principles

These are the recurring patterns that separate CoEs that scale from CoEs that stall. If any of the “Avoid” descriptions sound familiar, you’ve found where to focus next.

1. Establish a Mandate for Business Change

✓ **Do this:** Ensure the function that owns the CoE is accountable for enterprise-level transformation & innovation outcomes.

✗ **Avoid that:** Confining the CoE to being a supplier of resources, time and materials with no mandate to drive change.

2. Proactively Drive the Demand Pipeline

✓ **Do this:** Make the CoE responsible for assessing, prioritising and shaping opportunities across the enterprise.

✗ **Avoid that:** Restricting the CoE to delivery only, with no role in shaping or driving future demand.

3. Engage with Internal Stakeholders & Target Market

✓ **Do this:** Build a deep understanding of the business landscape and strong stakeholder relationships to surface real problems.

✗ **Avoid that:** A siloed CoE with limited visibility of, or engagement with, the wider business.

4. Design with Tangible Business Outcomes in Mind

✓ **Do this:** Define the desired outcome and tangible value during assessment, then let it guide design and delivery.

✗ **Avoid that:** Treating delivery as a technical exercise and losing sight of the business outcome it must serve.





5. Run the core Capability as a Fusion Team (Business + IT)

✓ **Do this:** Merge continuous-improvement business capability with IT development into a single team that designs and delivers together.

✗ **Avoid that:** A fragmented model where business analysis is handed over to a separate IT team — a siloed, waterfall outcome.

6. Design Solutions with Re-Usability at their Core

✓ **Do this:** Build with reusable, composable, scalable components from day one to enable rapid, efficient deployments.

✗ **Avoid that:** Bespoke, monolithic, rigid solutions that prevent reuse, agility and scalability over time.

7. Install a Continuous Improvement Ethos

✓ **Do this:** Empower business analysts to find incremental improvements; use customer-centric, data-driven decisions to eliminate waste.

✗ **Avoid that:** A reactive supplier model that waits passively for requirements to arrive from the business.

8. Engage with your Platform Vendor to Optimize Value

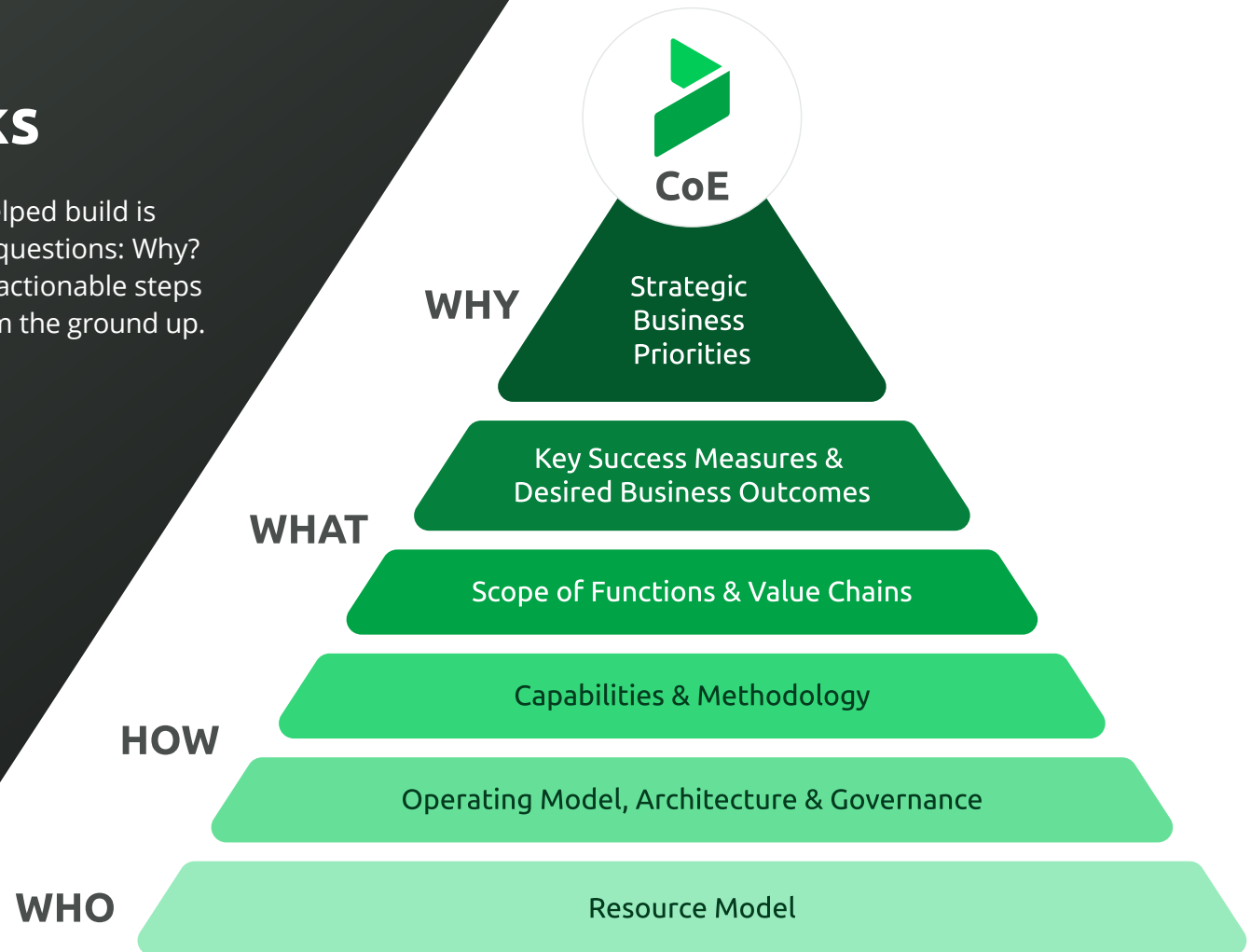
✓ **Do this:** Establish a regular cadence with your platform vendor to plan the roadmap, deploy new features and remove obstacles

✗ **Avoid that:** Operating in isolation and missing out on vendor expertise, new capabilities and accelerators.

***Quick diagnostic:** Score each principle 1–5 for your organisation today. Any score of 3 or below is a candidate for your first 90-day improvement plan.*

Your CoE Building Blocks

Every successful CoE Bizagi has helped build is structured around the same four questions: Why? What? How? Who? Here are eight actionable steps you can use to build your CoE from the ground up.

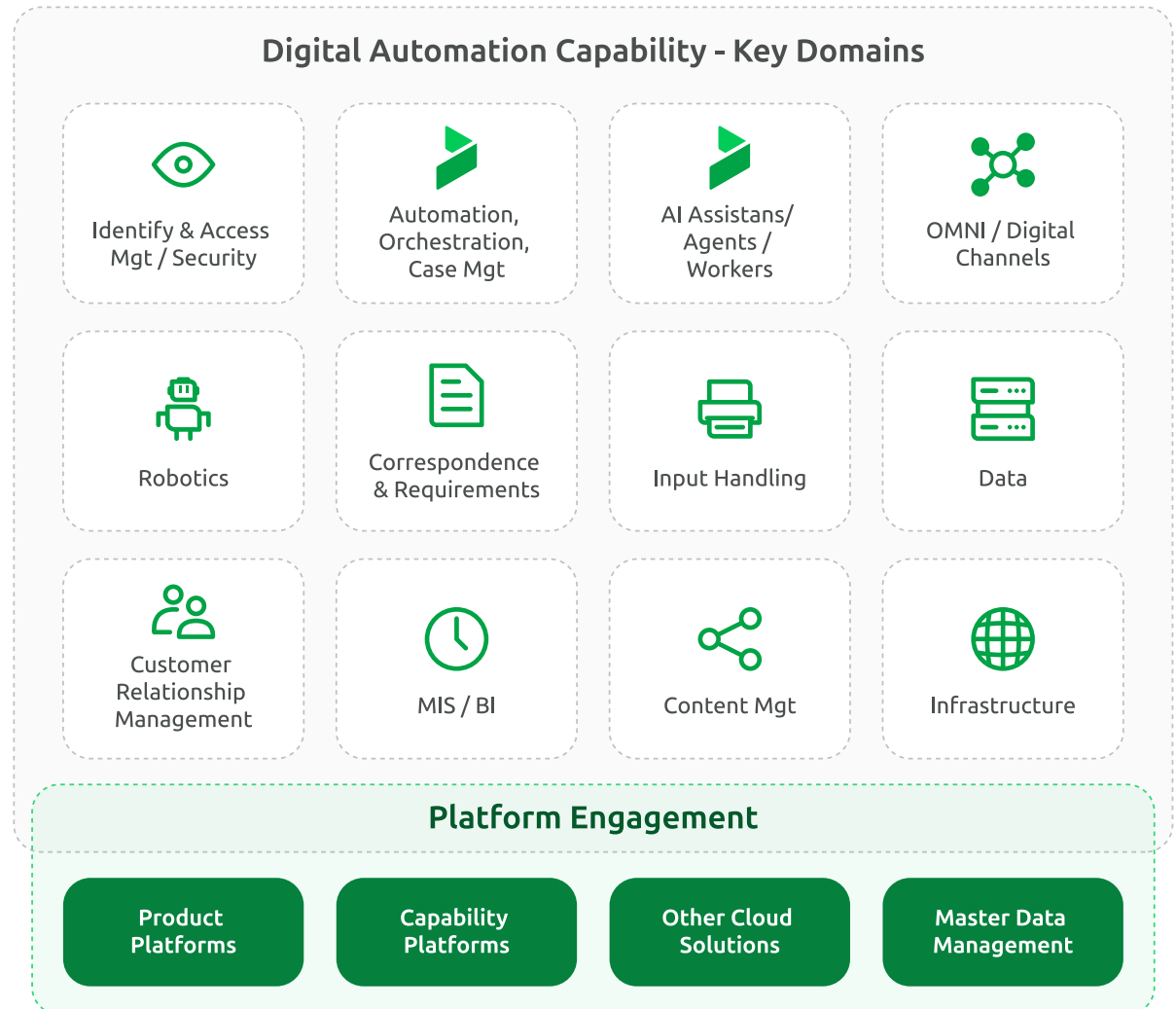


"I tend to work on boulders, rocks and pebbles. Having enough pebbles gives you the agility to fit into gaps where you have spare capacity; if you've only got boulders and things move, you end up with over-capacity."

1. WHO - Outline key domains

The Digital Automation CoE is a consolidation of both Business and IT skills, resources and capabilities. In terms of the specific competencies, the following diagram outlines the key domains that any digital automation capability could potentially require. Domain experts will be utilized on work when required during design phases.

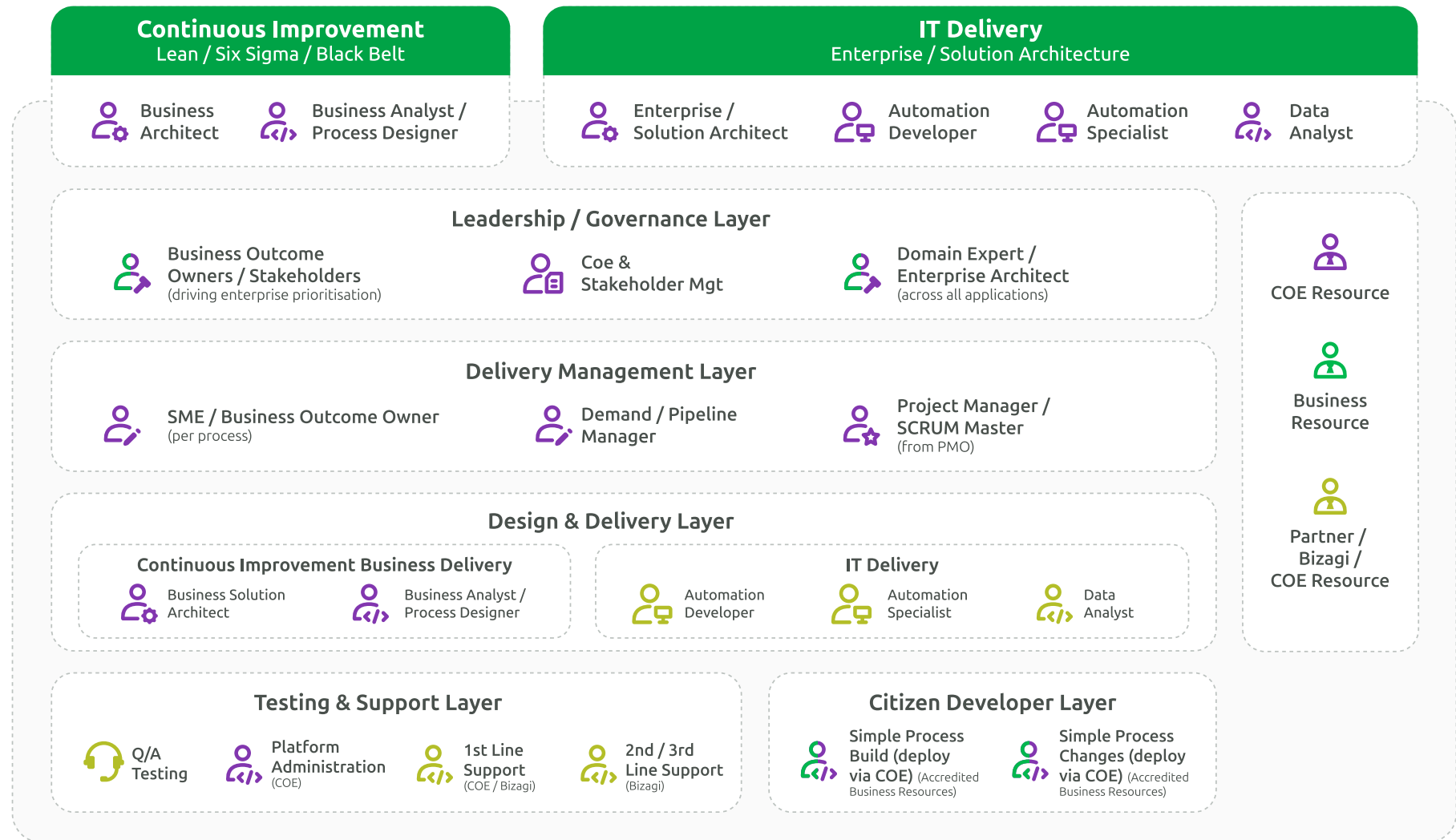
In addition, some of these domain experts will be utilized on Enterprise Design as well as Enterprise Oversight.



2. WHO - Define core delivery roles and structure within fusion team

Merge business analysis (Lean, Six Sigma, process design) with IT delivery (developers, architects, data analysts) into one team with one backlog. Add citizen developers for simple changes, with CoE oversight.

Fusion Team for Design & Delivery



3. HOW - Define the target market

Understanding the scope of functions, channels, capabilities and processes that fall under the CoE breadth of work is key.

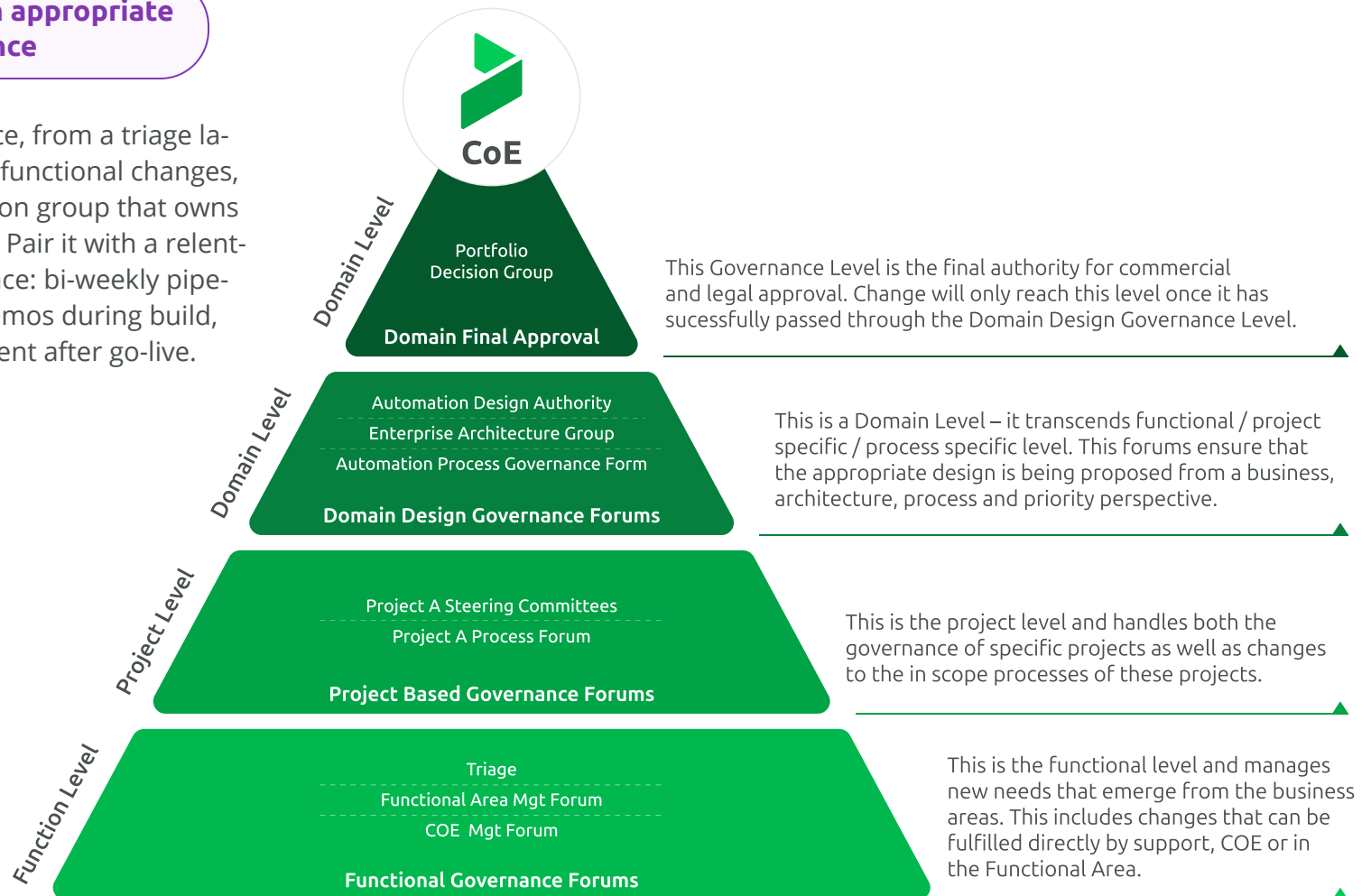
Will the CoE work within the following:

- **Divisions** – How the business has been organised
- **Channels** – face to face, digital, contact center, branch
- **Customer Facing Value Chains** – sales, servicing, claims, advice, money mt
- **Back office / Support functions** – HR, accounting, logistics, supply chain
- **Enterprise capabilities** – Legal, Risk, Finance



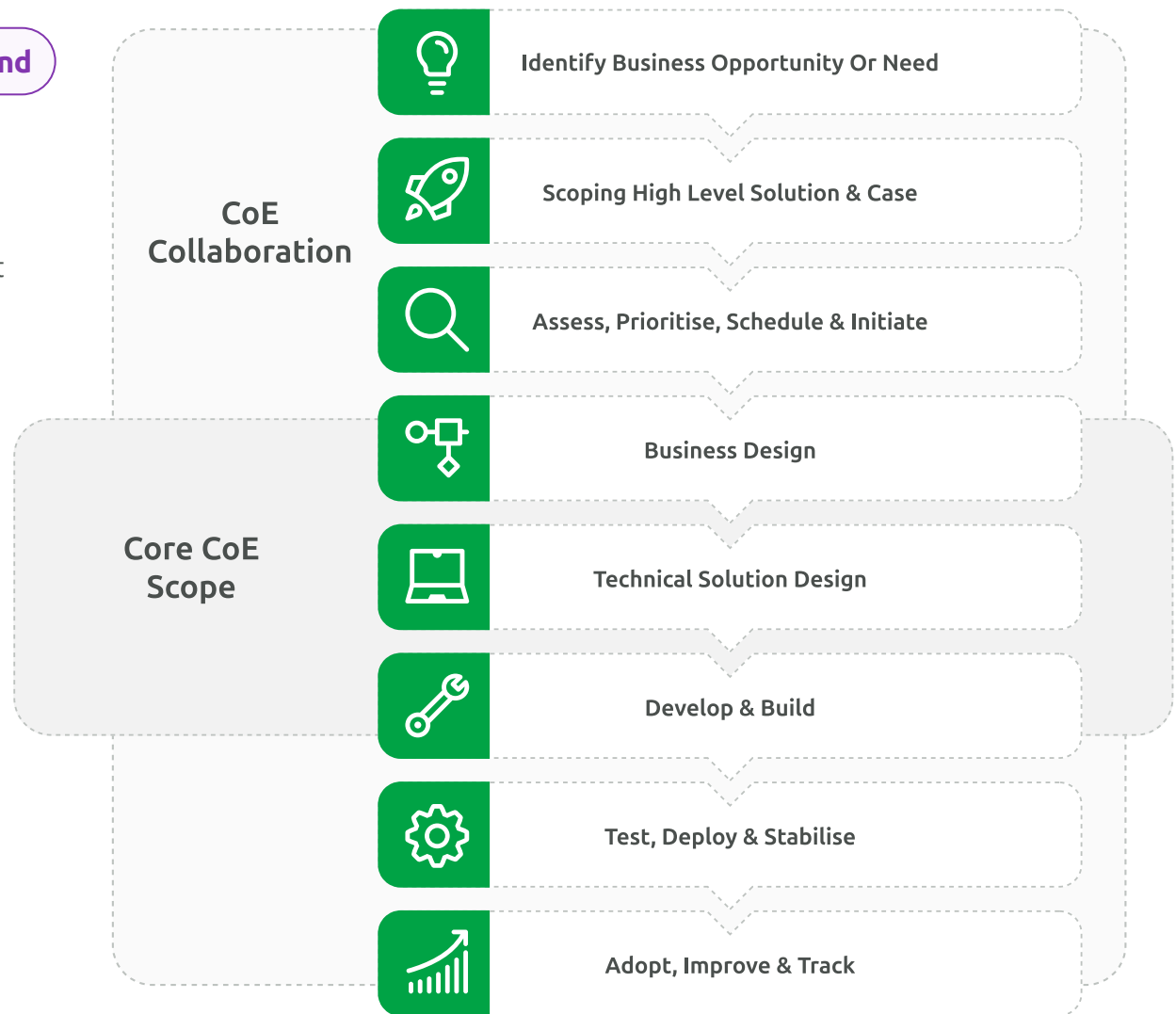
4. HOW - Establish appropriate levels of governance

Run layered governance, from a triage layer that handles small functional changes, up to a portfolio decision group that owns strategic prioritisation. Pair it with a relentless stakeholder cadence: bi-weekly pipeline reviews, weekly demos during build, and ongoing engagement after go-live.



5. WHAT - Define the scope & demand

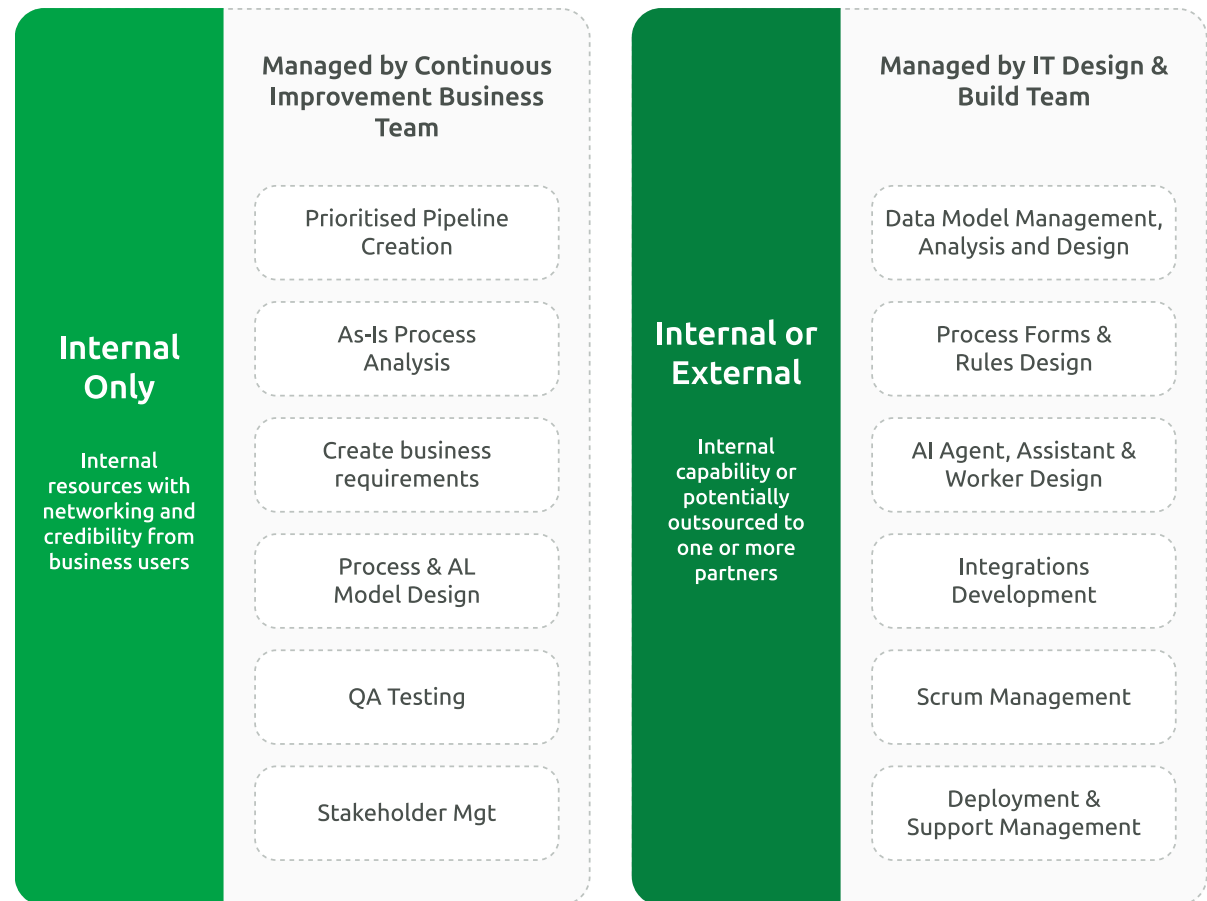
Make explicit which divisions, channels, value chains and domains the CoE owns. Build a continuous demand pipeline so the CoE is shaping opportunities, not just receiving requirements.



6. WHAT - Map core functions & capabilities required

Make explicit which divisions, channels, value chains and domains the CoE owns. Build a continuous demand pipeline so the CoE is shaping opportunities, not just receiving requirements.

Summary of the Center of Excellence capabilities



7. WHY - Define the purpose and objectives of the CoE

Define the CoE's purpose and the business outcomes it exists to deliver. Anchor it to enterprise priorities: growth, operational excellence, customer experience, regulatory change, not to a technology stack.



Enhance Customer Experience



Build Compelling & Innovative Digital Automation Propositions



Increase Ease & Simplicity for Customers



Unleash the Power from the Organisation's Core Platforms



Reduce Operating Costs & Increase Revenues



Rapid Response to Regulatory Change



Increase the Speed to Market



Solution Re-Usability & Scalability

8. WHY - Establish toolset for assessment and prioritization

In order to promote robust, objective and valuable assessment of priorities, it is recommended that are established across the Enterprise. This mitigates disagreements or opinion based decisions and promotes a standard method to define the way forward. The tool shown below is a process prioritization matrix that supports the development of demand pipelines.

Process Prioritisation Discovery Component Weighting



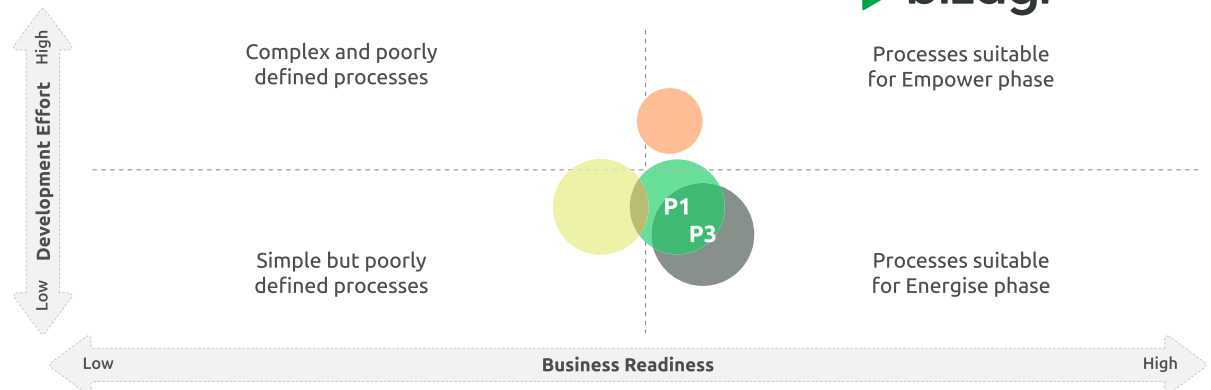
Process for Automation

	P1	P2	P3	P4	P5	P6	P7	P8	P9	P10
	Billing	Policy Visualisation	Combined Insurance Sales (Transportation)	Process 4	Process 5					

Business Impact				
20%	20%	40%	20%	100%
Alignment to Strategy	Mission Critical	Value Realisation	Business Reach or Volume	Impact
2.5	1.5	2.0	2.5	
3	1	2	1	
2	2	2	4	

Development Effort				
25%	25%	25%	25%	100%
Forms and Manual Activities	Level of AI Deployment	Business Rules	Integrations	Complexity
3.5	1.0	1.5	2.0	
3	1	1	2	
4	1	2	2	

Process Prioritisation Matrix



Bizagi Spark

The 'Spark' implementation framework focuses on delivering rapid time to value 'quick wins', then rapidly scaling to the enterprise with hundreds of processes with flexible iterative continuous improvement.

By helping you start small, think big and scale fast, Spark is based on agile project management methods that do away with the monolithic and rigid implementations of the past. Based on knowledge gained through global process automation projects across industries, we have the know-how, the people and the platform for your success.

“You do not want to be building everything from scratch. You want a library of components you can reassemble and reuse rapidly: that's what keeps momentum and stops the plateau.”

1/ Energize

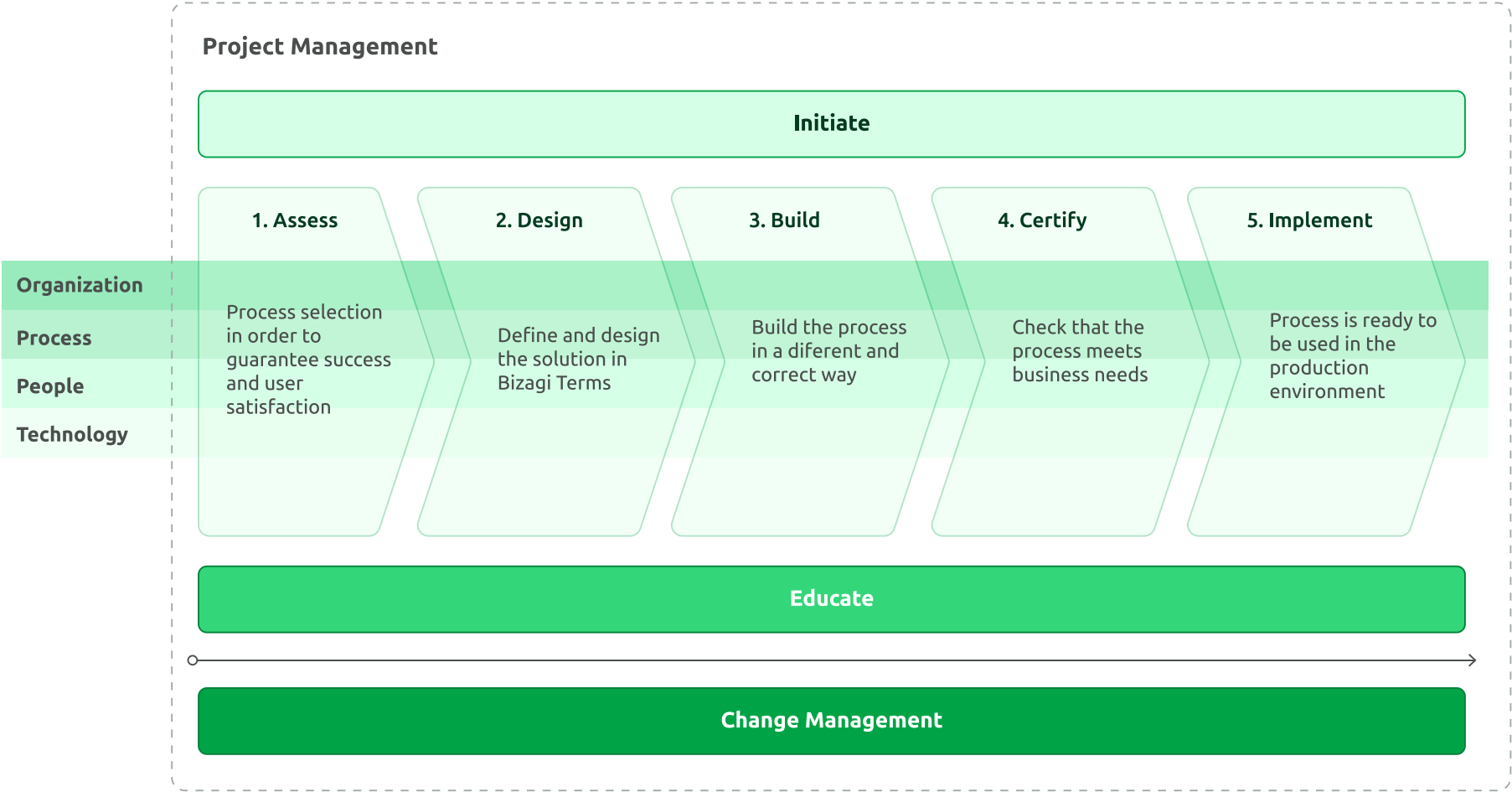
Select which business process to deliver first and see results in just 7 weeks. By selecting a 'quick win' process to automate first, you can:

- ✓ Build momentum into your program
- ✓ Gain stakeholder buy-in
- ✓ Instil confidence in process
- ✓ Increase process automation knowledge transfer

2/ Empower

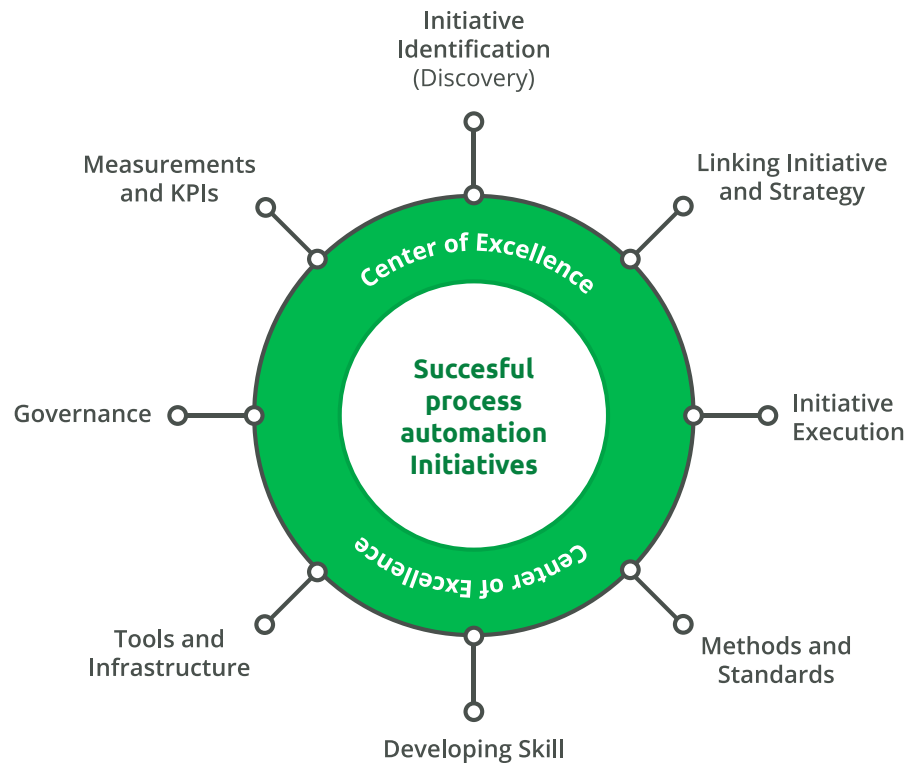
Replicate your Automation success with OnTarget Methodology. This expands on the 'Energize' phase and helps to replicate process automation rigorously and consistently.

Our OnTarget Methodology helps to establish process automation best practices and implement across other areas of the business.



3/ Expand

Finally, build on your success with your CoE. Align the process automation roadmap to your business' strategic drivers and establish a global Shared Service. You can define best practices for your organization and measure your automation performance to promote continuous improvement.



“

Using Spark methodology, Bizagi and EY helped Anida deploy 12 admission processes in 19 weeks, 5 weeks less than expected. Two years later, 42 processes are fully automated and used by nearly 1,000 employees.

”

Alberto Serfaty,
Senior Manager Performance Improvement, EY

10-point CoE self-assessment

Use this as a 15-minute leadership conversation. Tick each statement that is true for your organisation today. Anything unticked is a candidate for your next 90 days.

- | | |
|---|---|
| ☐ Mandate: Our CoE has explicit accountability for enterprise transformation outcomes — not just for delivering requested work. | ☐ Reusability: We have a maintained library of reusable processes and components — and we measure reuse. |
| ☐ Outcomes: Every solution we deliver has a named business outcome owner and a measurable success metric. | ☐ Stakeholder rhythm: Bi-weekly pipeline reviews and weekly demos during build are part of how we work. |
| ☐ Demand pipeline: We proactively identify and prioritise opportunities — we don't just react to inbound requests. | ☐ Governance: We have layered governance (portfolio, domain, project, functional) appropriate to the size of the decision. |
| ☐ Prioritisation: We use an objective Impact-vs-Effort matrix that every stakeholder understands and trusts. | ☐ Continuous improvement: Our business analysts actively hunt for incremental improvements; we don't wait for them to be requested. |
| ☐ Fusion team: Business analysis and IT delivery sit in one team, with one backlog and shared accountability. | ☐ Vendor partnership: We meet our platform vendor on a regular cadence to plan roadmap, deploy new capabilities and remove obstacles. |

How did you score?

8–10: You have a mature CoE. Talk to us about scaling AI agents and citizen development.

5–7: You have the foundations. Let's focus on the 2–3 gaps holding back scale.

0–4: You have automation but not a CoE yet. Our SPARK Energize phase is built for you.



Time to build your Center of Excellence

Now is the time to take action. Our Bizagi SPARK methodology can help you roll out your automation CoE efficiently. Get in touch with Bizagi and we can help you take the first steps.

Bizagi works with enterprises across financial services, insurance, energy, healthcare and government to design, build and scale automation Centers of Excellence on our process automation and AI platform. We bring the framework, the methodology and the platform — you bring the ambition.

Speak to an expert about your CoE project now:

bizagi.com/contact-us