

Case Study

Global financial institution looks to Judge's Business Process Optimization team to uncover and document critical process workflows

A global financial institution partnered with Judge Consulting to document vital internal processes that had never been formally captured and were only known by a few institutional experts. Judge led the discovery effort, working closely with stakeholders to surface undocumented complex workflows, identify inefficiencies, and deliver clear, actionable documentation.

THE CHALLENGE

Capturing Critical, Undocumented Processes

The client, a global financial institution, relied heavily on complex internal processes central to its operations—but the knowledge lived only within a few key individuals. Without formal documentation or visibility across teams, the organization faced growing operational risk. Inefficiencies and bottlenecks to resolve issues led to limitations in scaling and improving these processes. Additionally, the inability to provide process maps during annual audits heightened the risk of misunderstandings and concerns from auditors. The client needed a trusted partner to uncover and map the current state and help ensure continuity and alignment across the business.



THE SOLUTION

Thorough Discovery and In-Depth Business Analysis for Clarity and Alignment

The client identified 25 business-critical technology processes that were undocumented and dependent on the expertise of one or two individuals. Judge Consulting's Business Process Optimization team conducted in-depth discovery with SMEs and stakeholders. The team developed a comprehensive understanding of the client's intricate, and somewhat unknown, current state processes for critical workflows.



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Judge then carefully mapped these processes, validated key pain points, and created detailed documentation to improve visibility and alignment. Working collaboratively, Judge translated complex institutional knowledge into scalable, easily understood, referenceable resources.

THE RESULT

Broader Understanding and Increased Visibility into Key Processes

The newly documented process workflows brought clarity to previously opaque processes, reducing reliance on individual knowledge holders and increasing internal transparency. The documentation empowered broader team adoption enabling faster response times and more efficient issue resolution. In addition to enhancing efficiency and cross-team communication, formal documentation reduced operational risk during annual compliance audits.



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