Getting started with BPM

The goal of using Business Process Management is to optimize efficiency and improve profitability. Implementing a Business Process Management Solution offers immediate and long-term benefits, and a good start will help ensure that you get both.

These BPM Best Practices will help position your organization’s BPM implementation for success.

1. Don’t try to model how you should work — model how you actually work

Establish a starting point. Identify benchmarks for how people currently perform for best results. Then model that process, either graphically or even in a simple document. Once you’ve established benchmarks based on actual performance, you can develop a workflow model. And after validating the model, you can begin to apply improvements.

2. Think big, start small

Take an incremental approach rather than forcing changes on the “big picture” of interconnected processes all at once. When you start with a small, easily manageable project, you will produce measurable results that should ease the way for wider implementation.

This first implementation should be one in which real improvement actually makes a difference to the organization. No one will be impressed if the first application of BPM results in “improvements” like better handling of useless or unimportant tasks.

3. Involve all project stakeholders on development and test

Encourage as much collaboration as possible between developers and end users throughout the deployment process. The people who actually know how the process works and who are most often responsible for its effectiveness must be involved during the process modeling phase. IT knows how to transform the process model into user applications. They will also connect the process application with existing systems. And there are end users — those who will use the deployed applications.

Conducting quick-and-dirty test deployments during development to get hands-on user feedback (for example, to check the usability of online forms) can make all the difference between a BPM deployment that is quickly adopted and one that is quickly abandoned.
4. Choose the tool based on your needs

BPM applications come in different forms designed for different audiences. BPM implementation should answer the needs of the C-suite, the implementers in IT, and the end user. Typically, business executives need to track business processes with a primary emphasis on control, visibility and efficiency. Developers often prefer open source BPM solutions due to the transparency of the code and the availability of an ecosystem of inexpensive complementary solutions. And users want something simple and easy to use.

The total cost of ownership should be taken into consideration; proprietary solutions usually have a “per-seat” license cost and possibly even additional operating costs (if deployed as software-as-a-service, for instance) whereas open source solutions tend to cost much less. (See the Business Process Management Suite Buyer’s Tool Kit available at www.bonitasoft.com).

5. Choose a champion

Find and select a “champion” to manage the implementation process. The champion does not necessarily have to come from management—depending on the situation, it may be appropriate to appoint someone with a technical background instead.

The role of the champion is to support the choice of routines to include BPM and overcome resistance to these changes. The champion helps protect the BPM implementation and staff involved in the process from interference. The project manager needs to be a champion too, as this is the person who assumes all control of (and responsibility for) the project, oversees and directs the implementation process and should have the passion needed to sell it internally.

6. Establish milestones

Prepare a strong business case for both near-term and longer-term BPM implementation to address the scope and goals of using BPM in your organization in detail. It should have planned milestones and a reasonable deadline for each phase. This also minimizes risk; by simplifying a large implementation plan into a series of smaller, measurable steps, you are allowing for easier adoption.

7. Provide results promptly

It is important that the first benefits of BPM implementation show up quickly. Define deliverables that are based on results: something that people can actually observe or use.

8. Encourage collaboration

Ensure adequate communication and participation among all stakeholders during implementation. The champion should work closely with everyone involved to avoid “management disconnect” problems—where management may not fully understand the day-to-day issues that workers face in the actual processes involved.

Effective collaboration tools for BPM implementation include means for BPM developers to share (for example, a common repository), “social” mechanisms for discussion about the project, and the notation used for process modeling (for example, the BPMN2 standard).

9. Measure results step-by-step

Measure the results of new procedures to see whether the plan requires any adjustments. Identify what type(s) of data you need to gauge how much value has been added. Put a means in place to collect that data, like KPIs (Key Performance Indicators). KPIs can be tracked in business dashboards, charts, and so on that display aggregated data from both test results and live processes, which you can provide in the milestone deliverables.

10. Use professional services when necessary

Use outside experts (such as BonitaSoft’s consultants and partners) when you need better results faster than if you handle your organization’s BPM implementation completely internally. The main benefit of using external consultants, of course, is the experience they bring.

This is especially valuable in the case of software implementation, where a significant design flaw or miscalculation could cause major problems and damage the overall investment. Using a contractor may cost more up front, but expertise pays off in the long run.