

BPM GUIDE

Getting Started with the Basics

By converging awareness, knowledge, and action from across the organization, BPM can help you solve nearly any challenge, large or small...departmentally or enterprise-wide.

This guide is designed to enlighten your understanding, answer your questions, and give you the information you need to make solving your unique challenges easier...with BPM!



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What is BPM?

Business Process Management (BPM) is defined as the discipline of managing processes to continually improve agility and business performance outcomes.

What do you mean by process?

A process is simply a set of activities and transactions that an organization conducts on a regular basis in order to achieve an objective. It can be simple (i.e. order fulfillment) or complex (i.e. new product development), short-term (i.e. employee on-boarding) or ongoing (i.e. regulatory compliance), function-specific (i.e. proposal management) or industry-specific (i.e. energy procurement). It can exist within a single department (i.e. billing), run throughout an entire enterprise (i.e. strategic sourcing), or extend across the whole value chain (i.e. supply chain management).

OK, so BPM is a process discipline. In that regard, it's much like Continuous Improvement, or Six Sigma, right?

Yes and no. Continuous Improvement (CI) and Six Sigma are focused on optimizing existing processes. BPM can employ CI or Six Sigma tactics, but Traditional BPM is about integrating process improvement methodologies with technology to manage the full lifecycle of business processes, driving growth, efficiency, and cost reduction.

Confused by BPM nomenclature? It's OK. BPM has what seems like its own language. Get answers to your questions about what's what in the BPM Glossary at [BPMbasics.com](https://bpmbasics.com).

The Evolution of BPM

Workers today do much more, much faster than ever before. Technology has ratcheted up the speed of business to the point where there's more and more of *more* out there. *More* data, *more* competitors, *more* problems make it *more* challenging to consistently achieve positive outcomes.

That's where instilling process discipline can help. Business Process Management (BPM) has experienced the 'Tao of *More*,' represented by an influx of innovation that has matured it beyond its classic definition:

- Social collaboration has generated *more* ideas from *more* individuals across an organization.
- With the proliferation of (*more*!) mobile devices, workers have brought their consumer habits—and the mobile-always attitude—to the office.
- As the massive amount of data has only increased, a more unified view has become critical.
- And, burgeoning cloud deployments have helped make IT teams more strategic to their organizations.

In this section of the BPM Guide, we'll review the history of BPM and see how it has evolved to best address all of the MORE in today's digital economy.

History of BPM

At its core, BPM aligns IT and business, whether the goals are driving growth, cutting costs, improving service, complying with regulations, or achieving any combination of them all. In addition, BPM is evolving to address the needs of the digital business.

BPM technology has its roots in software to address any specific challenge. It evolved to become a comprehensive suite to drive process automation across an entire organization. And today, it is represented as a platform to get work done more effectively in a world where deep focus on process or data alone cannot compete.

BPM Software

Industry analyst firm, Gartner, called the BPM software market “...one of the high points of the overall software market...” Gartner further stated that BPM is not a passing fad, based on its ability to “... deliver tangible value, disrupt the status quo and transform [an] organization.”

In its simplest form, BPM software enables the design, management, and optimization of a business process by connecting people, systems and data. While traditional workflow management connects people by automating inefficient manual processes, it is limited, providing no means for managers to analyze performance, identify inefficiencies, or continually evolve the process. Also, it has few (if any) capabilities to connect data and systems to business processes, just people. Information Management technology, on the other hand, connects applications so data is automatically synchronized throughout an organization. But, it cannot effectively automate long-running or interactive processes requiring human intervention; it is focused on data and systems. By connecting people and systems while simultaneously providing the analytics necessary to measure and improve processes, BPM software brings together – and transcends – these two technologies.

At a minimum, BPM software must address the four core elements of process-based application development:

Design, Execute, Manage, and Optimize.

Design

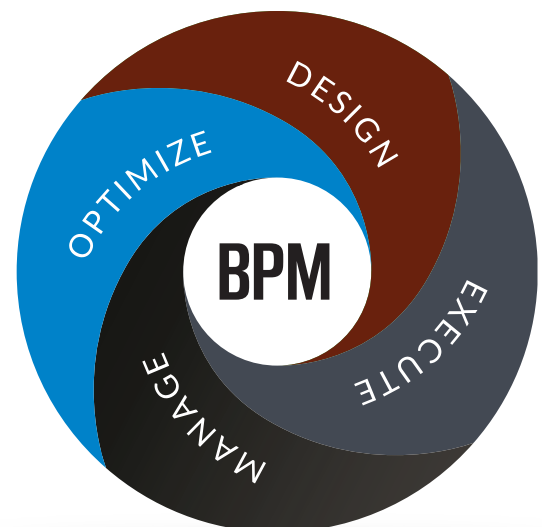
- Simple Business Process Modeling Notation (BPMN) to create graphical Process Models
- Rules Engine to create required business rules
- Intuitive designer for forms and application interfaces

Execute

- Process automation with enterprise-level scalability
- Comprehensive Web Services orchestration
- Integration with other enterprise systems

Manage

- Task and queue management
- Real-time reporting and status alerts
- In-flight process modification capabilities, enabling managers to handle exceptions



Optimize

- Business Activity Monitoring (BAM) capabilities
- Aggregate performance analysis
- Key Performance Indicators and SLA reporting

BPM Suite

As the value of process improvement in business became more understood, the BPM suite emerged with comprehensive, integrated capabilities to help organizations achieve their business goals and solve unique challenges more quickly at a lower total cost. A more cohesive approach to BPM than stand-alone technologies, the advanced BPM suite provides process management capabilities needed to achieve the optimal state of seamless, cross-functional process alignment.

There are ten critical components of a BPM suite:

Process – Simple web-based modeling using BPMN and SOA methodologies for rapid development and automation of business processes.

Rules – Automate, enforce and audit policies and practices of a dynamic rule driven process application.

Design – Rich and easy-to-use creation tools to quickly build simple interfaces.

Forms creation – Forms creator should allow designers to create interactive forms for users.

Analytics – Ability to track real-time process performance, create rich reporting dashboards, identify process bottlenecks, and optimize process efficiency flow.

Mobile – Ability to always be connected to important processes and tasks, regardless of time, place, or device.

Content – Integrated document and content management to store, secure, version, search and manage enterprise content for use in business processes.

Collaboration – Instant, continuous connections between people, processes, and information keeps the workforce aware, engaged, and working together toward objectives.

Data Integration and Access – Converge data from across all enterprise systems to provide complete information on any topic, available in a single location.

SOA and Integration – Use standard SOA development to build a repository of reusable services to accelerate BPM deployment to address many challenges.

Intelligent Business Operations Platform

Technology evolution and its application to conducting business has spawned what industry analyst Gartner has recently called “Big Change.”

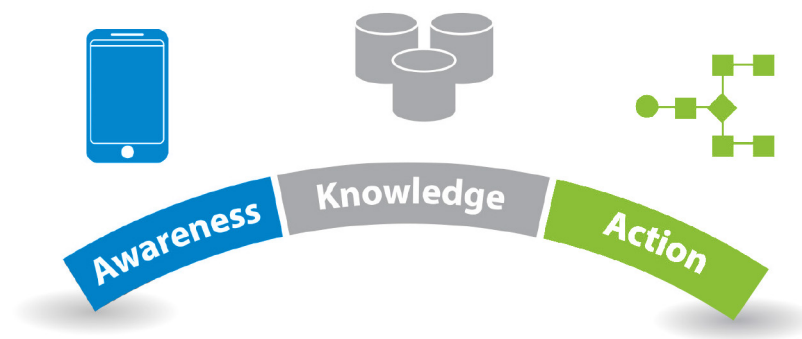
What is “Big Change?” According to Gartner, “Big Change involves significantly altering ongoing operations in a high risk environment characterized by elevated volatility, ambiguity, disparity/diversity and novelty/scope.”

Process has a big role in Big Change. Your organization must be agile, and BPM technology has evolved to help. This more holistic view of BPM offers a structured approach for optimizing processes. **It incorporates the software tools discussed above, as well as an organization's unique methods, policies, metrics, and management practices.** BPM at this level is about being agile enough to adopt and drive rapid changes across the organization.

Because this approach to BPM allows organizations to abstract business process from technology infrastructure, it goes far beyond automating a business process (software) or solving business problems (suite) – **it enables companies to take advantage of the latest innovations and be more flexible to rapidly address Big Change.** Those that embrace this approach achieve higher levels of growth, deliver more agile performance, and maintain business continuity. And, it all starts with the three new pillars of BPM.

The Three New Pillars: Awareness, Knowledge, Action

The combination of recent innovations—Social, Mobile, Analytics, Cloud (SMAC)—has sparked a BPM renaissance where individuals in the workplace are empowered to use more, do more, give more...all more quickly than ever before.



Your organization can address all of this *MORE* by empowering your workforce with three core concepts: Awareness...Knowledge...Action. Let's explore how this next wave in BPM technology will help organizations thrive in the new world of *MORE*.

Awareness: More Than a Social Stream

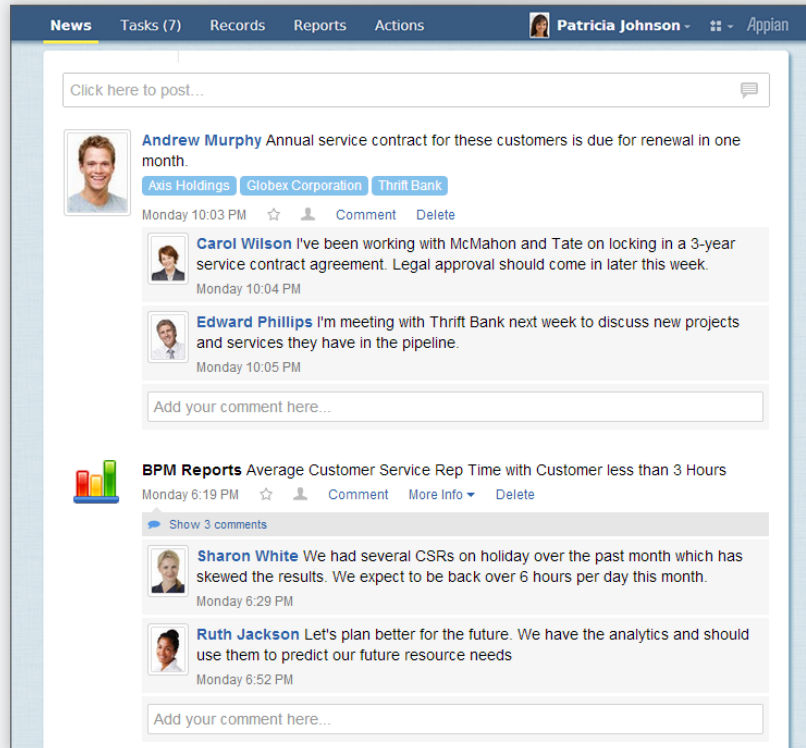
Social innovations in BPM have done more to tap the full potential of the workforce than virtually any other BPM enhancement in the past twenty years.

Make no mistake about it. Social in the workplace is not Facebook or Twitter or LinkedIn. It's not about likes, tweets, or fun infographics and quotes. And, it's not just for social outings or organizational culture initiatives. When done right, it can be a strategic differentiator.

Social BPM is about awareness. It's about participation. It's about collaboration. It's about innovation.

Think about your organization's communications today. How are people made aware of occurrences, initiatives, project status, red flags, kudos, competitive threats, key observations, and so on? Email? Meetings? Intranet? Something else?

What if you empowered the workforce with awareness of issues, successes, customers, projects, milestones, risks, status, etc.?



An example of Social BPM in action: notice the process-driven information which grants more perspective to those involved. With more awareness, cross-functional perspectives are in the open.

The best answer, which previously may never have been discovered, often presents itself as a byproduct of collaboration driven by Social BPM. **With more complete awareness of what impacts the business, the workforce itself becomes more informed, more engaged, more innovative.** Driving awareness—across teams, departments, organizations, lines of business—represents what may be the single best way to accelerate progress.

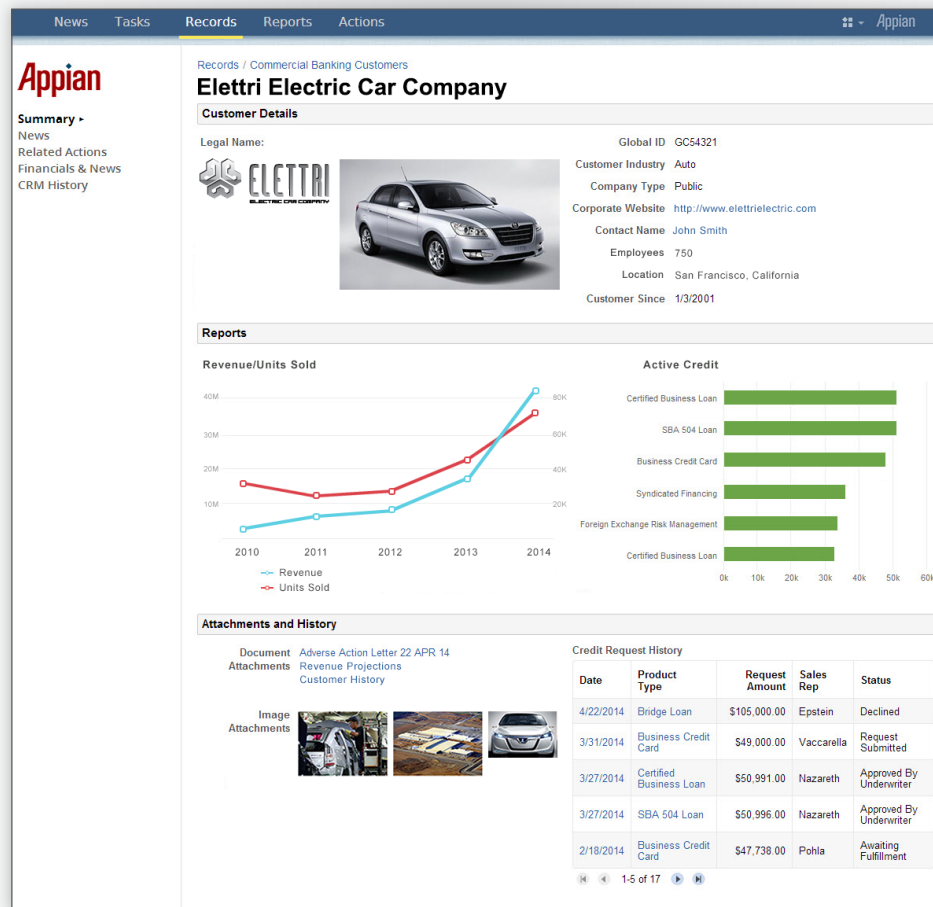
Knowledge: All that is Relevant...Converged

Awareness alone though, is not enough.

With increased awareness comes a need for knowledge; for better access to complete information. But, technology has spawned big information challenges. First, where is it? Is it in this system? That one? Do the right people have access to the information they need to best do their work?

Without the right information, how can anyone make the best decisions? But it's not that simple. Information across an enterprise is usually spread far and wide in the nooks and crannies of legacy systems. And integration can be an extremely difficult endeavor.

What if workers didn't have to search multiple systems because information of any particular topic was accessible in a single, intuitive place? What if the integration to make this happen was not such a time-consuming, arduous task? What if information needed at any particular point of work was readily available for someone to use...for someone to take informed action?



With all relevant information on any topic in one place, the speed of business is not impeded by information overload.

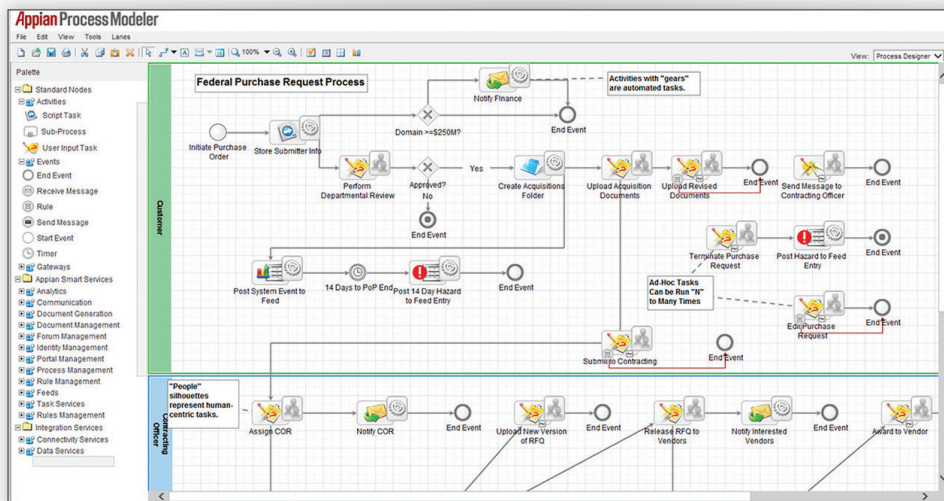
With the evolution of BPM, information is converged from everywhere, increasing organizational knowledge, and as a result, driving faster, more informed action.

Action: How Work Gets Done

Being action-oriented is generally considered a positive thing. But when is it not? When the best action is not possible due to lack of awareness, or when it's the wrong action because it's not supported by complete and up-to-date knowledge.

When a process is driven by awareness and infused with the right knowledge, good things happen.

The evolution of BPM sees the convergence of the three pillars of Awareness, Knowledge, and Action. It improves how work gets done, transforming what can be complex process lifecycle management functions into an easy-to-build, integrate, use and maintain work platform.



When a process is driven by awareness and infused with the right knowledge, good things happen.

The Work Platform: AKA (Also Known As) Success

It's a strange dichotomy. As technology has made things easier for everyone, it has also made things much more complex.

Work is hard enough. Consistently achieving success is difficult. The technology designed to help should be easy. That means driving awareness, instilling knowledge, and informed action without barriers.

In summary, **Awareness** is about participation and collaboration. Empowered with increased awareness of business issues, successes, customers, projects, milestones, risks, etc., the workforce itself becomes more innovative. Considerations are made and conversations are had that would never take place cross-functionally if it were not for this more transparent awareness.

Knowledge is about access to unified, appropriate data. It's about having complete, accurate information on any particular topic exactly when it should be known. It's about already knowing where that information is so time is not wasted searching for it.

The right **Action** is always supported by awareness and knowledge from across the organization. Process is important. But an efficient process does not start without awareness...and the most successful outcomes of a process are not achieved without the right knowledge.

It is this combination of awareness, knowledge, and action that drives the biggest impact for the enterprise. By supporting this vision, **the BPM suite has evolved into a work platform - a way to rapidly and easily build, launch, and use enterprise apps that drive awareness, instill knowledge and promote fast, impactful action.**

Do You Need BPM?

What are some reasons you might consider a BPM solution?

Here are 27 of them we've collected from businesses, non-profit organizations, and government agencies from across the globe.

You know it's time to consider BPM when...

- 1 Your processes still leave a paper trail....a REAL paper trail.
- 2 Your IT team has multiple projects focused on building new solutions to problems you bought [insert vendor name here] to solve more than a year ago.
- 3 All those off-the-shelf products you bought can't fully solve your problem(s).
- 4 Three words: Silos...silos...silos.
- 5 You lose visibility of a process once it leaves your department.
- 6 You deal with the swivel effect: look at this screen, then swivel to look at that screen.
- 7 Different business units have different systems for the same purpose.
- 8 The software in place is inherently difficult to use.
- 9 Your challenges are too unique for any product you've found to solve completely and cost effectively.
- 10 You just wasted two years with that [insert vendor name here] project.
- 11 If there is one thing about your processes that's true, it's that they are decentralized.
- 12 The software you are using to try to fix things just makes everything more complicated.
- 13 You have involuntary twitches when you think about your current systems.
- 14 You just realized you've spent the last decade thinking documents are everything only to realize you need data from databases, spreadsheets, transactions, etc.
- 15 Your employees spend more than 50% of their time looking or finding rather than doing.
- 16 Your content management and document management systems are just a data repositories that are growing out of control.
- 17 You spent a gazillion on ERP software and implementation only to realize that you still have hundreds of apps to go...
- 18 ...And you have no budget for another big spend...

19 ...And your users hate the new system anyway.

20 You replace a single system, you have to rework 150+ interfaces...and you have 3 new systems in queue.

21 You thought you had a development platform but all you got is a sales automation tool.

22 You thought it was going to save you money but you didn't count the cost of integrating, integrating, integrating.

23 You're trying to recruit and retain top young talent who do not want to hear that they have to use email and spreadsheets as a primary means to share information.

24 You don't have an answer for your executives who want to review and approve via mobile devices.

25 Your users have to input the same information into 'the system' three times because your 'system' is actually many systems.

26 Finding the right information is like finding a needle in one of six haystacks located somewhere in the northern hemisphere...or was it in the southern?

27 Insert your challenge here _____.

No matter your challenge, BPM today can help. BPM can improve business outcomes, help make your IT team more strategically focused, and even solve your most unique process challenges.

RESOURCES:

- [Video: Start the Transformation](#)
- [Whitepaper: Tap the Power of Intelligent Processes](#)

BPM Successes

How can you tell if a BPM solution will make a positive impact? In this section, we'll review how others have used BPM successfully to address their process challenges.

Work today is tough. The massive amount of information can be impossible to navigate. And unless process discipline is in place, replicating positive results can be difficult. Additionally, many discount the human element. Knowledge workers in any organization hold what's typically untapped knowledge!

When embraced by IT staff and business process owners, BPM today can solve virtually any challenge. Why? **Because it provides contextual awareness along with instant access to the right knowledge so workers can take the most impactful action.**

Here are some examples of how leading organizations have used BPM to solve their unique challenges.



Crawford and Company Industry: Insurance

CHALLENGE: Coordinate, manage, and empower global teams of claims contractors pulled together in the hours after major disasters

RESULTS FROM BPM IMPLEMENTATION: Improved operational efficiencies by leveraging mobile and social BPM

- Accelerated business operations by as much as 80%
- Increased speed of invoicing by 70% by transitioning from manual, paper-based process
- Cut claim reporting time by 64%

Want to read more about Crawford's experience with BPM?

[Click here for the full case study.](#)



EDP Renewables Industry: Energy

CHALLENGE: Rapidly identify, share, and prioritize information to optimize turbine performance; collaborate across vast geographic regions

RESULTS FROM BPM IMPLEMENTATION: Identified and addressed issues in the first nine months worth more than \$100 million

- Created a searchable knowledge base of detailed solutions to address future issues
- Eliminated reliance on email tracking, improving information flow and accelerating performance
- Tracked frequency of issues related to specific equipment suppliers, improving procurement

Want to read more about EDP Renewable's experience with BPM?

[Click here for the full case study.](#)



Janus Capital Group Industry: Wealth Management

CHALLENGE: Remove manual processes and improve operations

RESULTS FROM BPM IMPLEMENTATION: Optimized cash management process

- Improved operations, automating key processes
- 98.6% reduction in manual steps

[Click here for a video presentation focused on Janus' BPM Journey](#)

Some of the world's largest and most respected organizations are successfully using BPM technologies to solve their most pressing challenges.

RESOURCES:

- [More BPM Success Stories](#)
- [Video: Do you need BPM?](#)

How to Get Started?

Once you've decided to embrace BPM, where do you start?

The benefits of process improvement can be applied to just about any facet of an organization. But where you start can have a big effect on how successful your BPM initiatives are over time. Conceptually, the key is to “plan big, start small, and iterate.” This means selecting a manageable initial project with low process complexity and high impact to the business, promoting your early successes, and pushing BPM best practices out to other areas of the business.

The key issues to consider here are around the level of exposure this process has for the business (processes that directly impact revenue, cost, or customers are obviously high on this axis), as well as the level of complexity of the process (including things like number of process steps, integration points, people involved, and more).

Ideally, you want to start with a high exposure, low complexity process. High exposure means it will be noticed by executive management, and low complexity means your chances for success are very good. An initial deployment like this can usually be accomplished through the professional services offerings of your BPM vendor, and you can be up and running fairly quickly. Promoting this early success (and the best practices of that deployment) will help drive new BPM projects across your organization.

ANALYST REPORT:

- [The Gartner Magic Quadrant for Intelligent BPM Suites is provided here for your review.](#)

Appian is pleased to be considered the leader in Business Process Management Solutions. Appian is an all-inclusive solution with traditional BPM capabilities, including process modeling, task management, process lifecycle management, business complex event processing, identity management, document management, social collaboration, native mobility, real-time analytics, governance, and more. To learn more, visit www.appian.com.

Conclusion

BPM can solve your problems, improve your operations, make employees more effective, unlock more innovation, reduce costs, speed impact, solve your unique challenges, and so much MORE.

In this BPM Guide, you've learned about BPM and how IT can impact your organization. Perhaps you have formulated your vision for how your organization can more fully leverage modern BPM technology.

Partner with Appian to make your vision a reality. Learn more at www.appian.com.

About Appian

Recognized as the market leader in modern BPM software, Appian delivers a Work Platform that unites users with all their data, processes, and collaborations – in one environment, on any mobile device, through a simple social interface. Appian's Business Process Management (BPM) Suite seamlessly integrates work automation with native mobile and social capabilities. Appian is available on-premise and in the cloud, with complete portability. More than 3.5 million users, from Fortune 100 companies to the mid-market and small businesses worldwide, trust Appian to power their critical business processes. For more information, visit www.appian.com.