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Workflow Management for Beginners
Using SAP® Signavio® Process Governance

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Table of Contents

Introduction

This paper is an introduction to the "what," "why," and "how" of workflow management. Getting started with workflow management doesn't have to be a massive undertaking, or even an IT project. Instead, we want to tell a simple story about simple workflow management.

This paper is for managers and employees of all kinds who are interested in ways to help their teams work together effectively. You don't need a technical background to understand workflow management, because the concepts and practices are first about how people work and only then about possible IT support.

The five sections in this paper cover what you need to know to get workflow management up and running. More details about each of the following topics can be found by clicking the following links:
- [What workflow management is](#)
- [Why you should consider workflow management in your organization](#)
- [Business process software](#)
- [How to choose which process to automate first](#)
- [Getting process models up and running](#)

What Workflow Management Is

We'll start with an explanation of what workflow management is, because reading academic or technical explanations or looking for some kind of official definition isn't going to help you understand how to get started in practice. Once you have a practical idea of what workflow management is, you'll be ready to understand how you can realize its benefits.

WORKFLOW MANAGEMENT BY EXAMPLE

Before getting too abstract, let's start with an example. Consider what's involved in hiring new employees to join a company.

Hiring a new employee is an example of work done in an organization that has a clear business goal: a new employee who has passed the appropriate selection process becomes a member of staff. To achieve this goal, hiring managers, recruiters, and HR staff work together on a number of tasks.

Hiring a job candidate requires a number of pieces of information, such as the candidate's name and CV and details of the job vacancy. Some tasks will generate (involve gathering) additional information during the hiring process: who performed interviews and when, their individual evaluations, practicalities such as the candidate's availability date, and the final decision to hire the candidate or not. This information must be captured, made available to the right people in time, and archived.

When an HR team or recruitment department is hiring a number of new employees, management will coordinate this work to achieve a number of goals. Managers want to select high-quality employees at reasonable cost without avoidable delays, presenting a professional company image to all candidates.
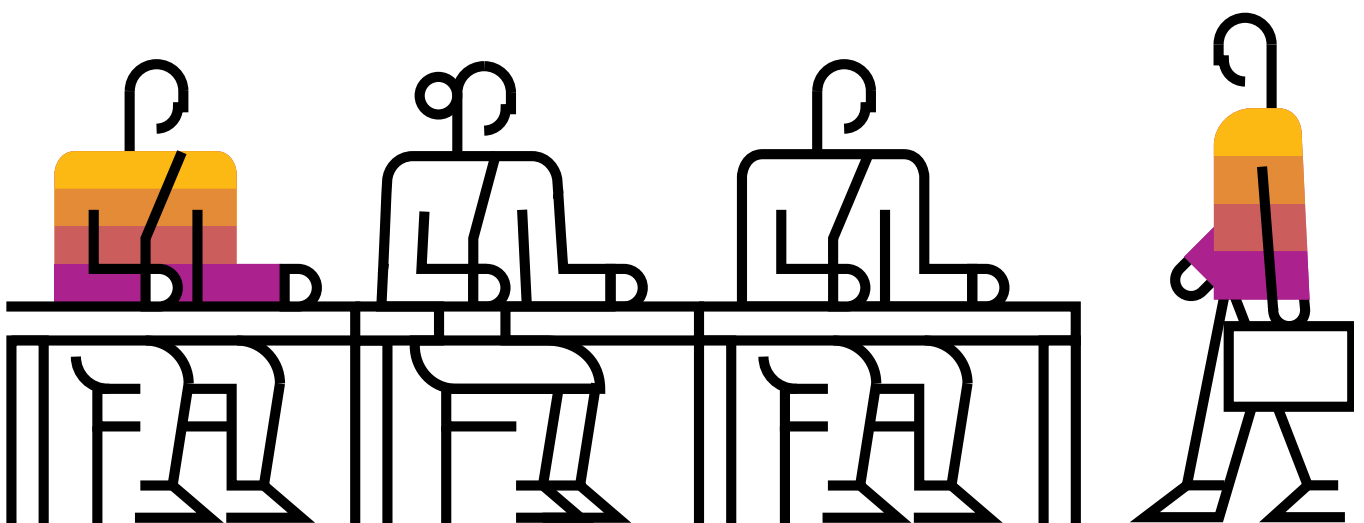
At the end of the process, when a candidate is eventually hired, IT systems may need to be updated. The vacancy on the company Web site can be removed, and the new employee must be added to the staff database, possibly with records of the hiring process added to their personnel file.

This hiring process example includes most of the elements we need to explain what workflow management is in general.
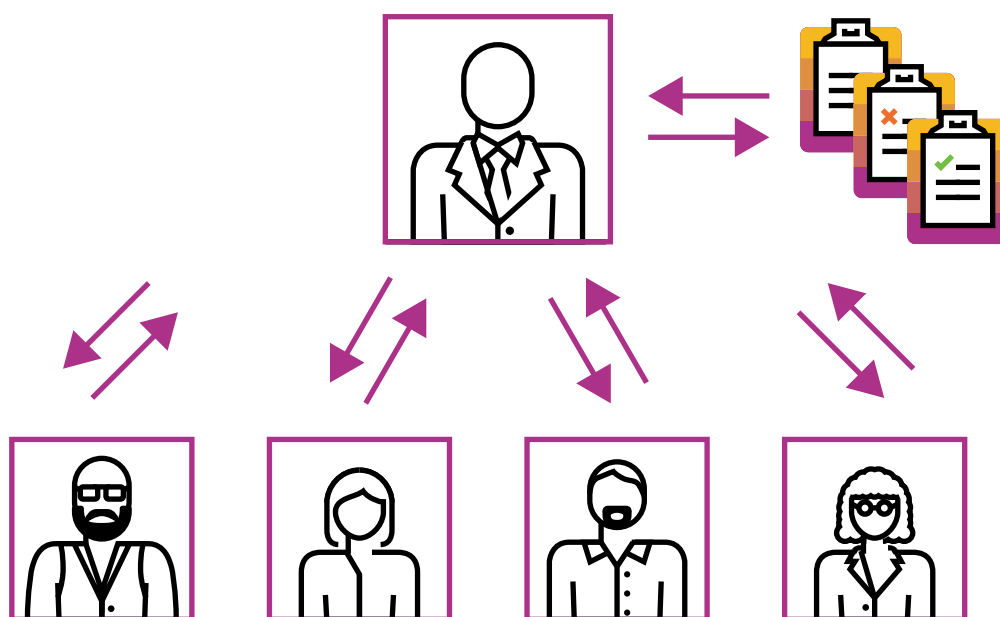
WORKFLOW MANAGEMENT IN A NUTSHELL
Workflow management is the coordination of tasks that make up the work an organization does. By "workflow" we mean a sequence of tasks that are part of some larger task; it is sometimes synonymous with "business process." The purpose of a workflow is to achieve certain results, and the purpose of workflow management is to achieve better results according to a certain set of goals.

Workflow management is principally a management discipline, focused on the structure of work within an organization and how teams collaborate to complete this work. In principle, workflow management doesn't require software, but in practice, software tools are used to keep track of the work and to automate parts of it.

Workflow management is concerned with the work people do, but tasks may also be automated and performed by IT systems – computer software. Workflow management can therefore include IT systems integration to share data between workflows and other IT systems within an organization.

The visibility of the work that comes with workflow management tends to lead to awareness of how to improve these workflows. Business process improvement is a natural part of workflow management. This is also one reason why workflow management is a management discipline and not just software. Process improvement is about changing how people do their jobs, which is more difficult than reconfiguring software.

Why You Should Consider Workflow Management in Your Organization

You should consider introducing workflow management into your organization because of the value it can add to the way people in your organization work. This value translates to concrete benefits in the short and long term.

HOW WORKFLOW MANAGEMENT ADDS VALUE

Workflow management adds value by introducing two things: better communication among people working together on shared tasks and better visibility of how tasks in your organization get done.

Better Communication

When a group of people are working together, a large part of that work is in the communication between group members. They need to communicate to agree on overall goals, agree on who works on what and in what order, keep each other up to date on progress, and share new information about the work as needed.

Communication isn't a problem if you work only with the person sitting next to you, but many kinds of office work rely on e-mail or direct messaging platforms. It could be worse (paper memos, telephone, or fax), but these methods of communication are a mixed blessing – too many distracting notifications or an in-box full of unread messages are common problems. These challenges are exacerbated by the increased prevalence of remote work, where direct, face-to-face communication is not an option.

Workflow Visibility

Talking to each other isn't all that is needed for people to work well together. They also need to be able to see what is going on, so they can know what to do without always having to interrupt each other. In other words, being able to see what's **actually happening** requires visibility.

Visibility adds value because it provides the information you need to identify and solve problems, continuously improve, and provide transparency to build trust within a team. Workflow management creates visibility of the type, volume, assignment, and rhythm of the work being carried out in your organization:
- Type – what tasks exist
- Volume – how much there is to do
- Assignment – who is doing what
- Rhythm – how long things take and where waiting happens

What these four kinds of visibility have in common is that they are visibility into how work **flows** between tasks and people. This is literally what we mean by "workflow." Crucially, workflow visibility adds value when it is a natural by-product of doing the work. Other management approaches could generate the same visibility, but only at great cost and inconvenience.

Focus on the Really Important Topics

Workflow can help you spend your time on the most important topics by automating repetitive tasks and providing tools for management by exception. Defining standard processes allows you to perform recurring work more quickly, and workflow management automates much of the coordination and handovers between people working on shared tasks. At the same time, task reminders, due dates, and escalations help identify exception cases.

KEY BENEFITS OF WORKFLOW MANAGEMENT

As a management approach, workflow management offers a number of benefits. In practice, many of the benefits come from the combination with workflow software that can automate most of the team communication and workflow visibility.

Workflow management enables teams to **reduce costs** by spending less time on:
• Performing duplicate tasks
• Reading and writing e-mails
• Getting new employees up to speed on common tasks
• Fixing errors and "failure demand"
• Coordinating internally
• Identifying and avoiding unnecessary work

Teams can offer **better service** to their internal and external customers by completing work more quickly as a result of:
• Finding and removing bottlenecks
• Performing certain tasks in parallel

• Causing fewer delays from abandoned or forgotten tasks
• Reducing variation in how work is done, producing higher-quality results
• Being able to hand unfinished work over to a colleague
• Having an affordable audit trail of activities

Additional benefits include:
• Faster handovers between colleagues
• Opportunity to identify imbalances in team composition
• Ability to collect data about workflow performance, enabling process improvement
• More flexibility to roll out process improvements consistently
• Less paper used

Together, these benefits reduce costs, increase team productivity, and delight customers. These benefits are highly likely to help you achieve your business goals. That's why you should consider workflow management in your organization.
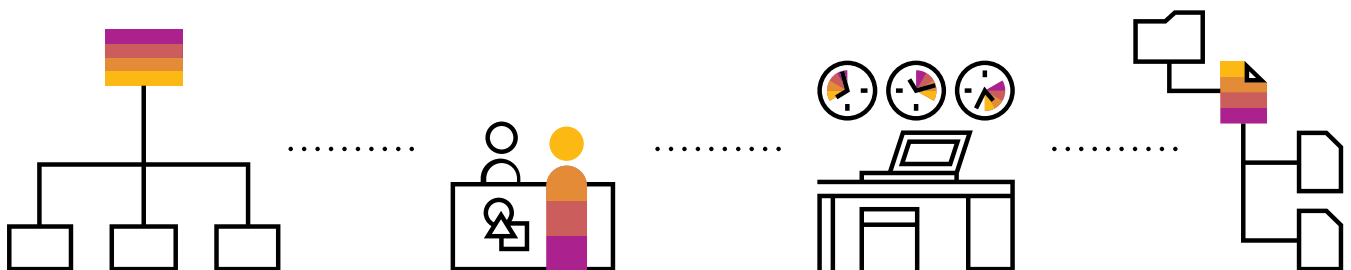
SOFTWARE SUPPORT FOR REPETITIVE WORK

Workflow tools are ideal for repetitive and recurring work: they can automate key tasks in the right order, to the right people, at the right time. This includes presenting the right tasks in a workflow.

When you don't have to spend time keeping track of what's in progress, and you don't have to manually inform your colleagues, you have more time to spend on something else. When you don't have to worry about the small stuff, you can use your time for more important topics.

Automating repetitive work also means employees are free to focus their attention and efforts on things such as creative thinking, strategic planning, long-term projects, product development, customer research and satisfaction, collaboration with colleagues, and idea generation. In other words, they can focus on all the creative and unstructured work humans do best.

MANAGEMENT BY EXCEPTION

Management by exception is about focusing on abnormal situations – cases in a business process that are not completed as usual. These cases are important because their outcomes determine the limits of things such as customer service, for instance, an online retailer that is only as good as the longest delivery time.

Unusual cases are also the most interesting, because unique problems require more creativity and intelligence to find a solution than standard problems do. This matters because having opportunities to use creativity and mastery to do their work is part of what motivates people to enjoy what they do.

OPTIMIZING PROCESSES WITH BUSINESS PROCESS MANAGEMENT SOFTWARE

Of course, all the benefits and ideas for workflow automation can quickly become irrelevant if the processes you are attempting to automate are not functioning as they should. Unfortunately, there is often a temptation for organizations to treat automation as an immediate solution that will double their profits and halve their costs without any effort. While it may be possible to reach this outcome in time, an automation project is destined for failure if there is no baseline from which it can work.

You will need a clear understanding of how your business processes actually operate – not just how they are supposed to operate – to decide if and how an automated solution can be implemented.

This requires your organization to capture and document its current processes and assess any variances. The best way to achieve this is to make use of automated process discovery tools, which help reveal underlying system processes and provide insight into variations and compliance issues. The trick here is to avoid simply doing the wrong thing faster. You need to gain a clear understanding of your process landscape before moving on to choose the kind of business process software that will work best for your business.

Choosing the Right Kind of Business Process Management Software

As with most (or perhaps all) kinds of software, there's more than one way to do it. A one-size-fits-all solution would be nice, but costs vary too much for that to be realistic. In practice, you will either adopt one of the more cost-effective approaches or adopt an expensive business process management (BPM) solution and end up using a simpler solution most of the time anyway. The next section expands on how best to make this important decision.

Business Process Software

There are many ways to apply a process model. Implementing a process in computer software is just one possible application. After all, a lot of work gets done without using computers to tell people what they need to work on.

If you do implement a process model in a software system, there is more than one kind of end result. You might end up with any one of the following:
- An ad hoc solution using basic office software
- A simplified workflow using a dedicated workflow management tool
- Full BPM using a heavy-duty BPM system (BPMS)
- Some form of custom application software

These approaches have different benefits and costs. It is not the case that one size fits all, so each one deserves a closer look. But regardless of the automation efforts you choose, keep your ultimate aim in mind: end-to-end process management is the goal.

AD HOC SOLUTIONS
The most basic kind of process software is an ad hoc solution using office tools, principally spreadsheets and e-mail. This is by far the most common approach, and it lets you get started with tools you already have.

However, ad hoc solutions using spreadsheets or sticky notes on whiteboards quickly become unwieldy, error prone, and expensive when more people handle a larger number of cases. Also, since there is no explicit workflow, quality suffers when people forget to do things. Spreadsheets aren't a great tool for shared use by multiple people, whiteboards only work when everyone is in the same room, and getting too many e-mails can be just as time consuming as writing documents out by hand.

When you want better access to shared information and automated notifications, it's time to consider a workflow tool.

SIMPLIFIED WORKFLOW
The next kind of process software is a lightweight workflow solution that executes a simple process model with a standard user interface and basic integration capabilities. In the case of the SAP® Signavio® Process Governance solution, the software runs in the cloud and provides a Web interface.

A workflow tool gives you a user interface for specifying a repeatable process, such as an order fulfillment process, and executing cases, such as handling customer orders. Instead of using a spreadsheet to enter information, you define forms for entering order details in the Web interface. Instead of entering status information manually, completing tasks automatically updates the workflow status and records dates in a timeline.

Automatic notifications keep the right people informed about the progress of each customer order. SAP Signavio Process Governance sends e-mail notifications to participants when one of them creates an order, completes a task, adds a comment, or interacts in some other way.

Workflows often require integration with other systems, typically to fetch information, such as a product catalog lookup, or to send notifications to an external system, such as updating an inventory management system when a product is shipped.

A benefit of a simple workflow tool is increased automation: specifying your processes means that the software can do more work for you by structuring information, presenting it more clearly in the context of a specific case – such as a customer order – and handling details such as notifications, access permissions, and integration.

Simple workflow tools do have limitations because they prioritize being easy to use. For features such as full support for Business Process Model and Notation (BPMN), you need something else.

FULL BUSINESS PROCESS MANAGEMENT

A heavy-duty BPMS avoids the limitations of simpler software. A BPMS may support all of BPMN and provide more options for customization and systems integration, and it usually has more management and reporting functionality to support the management part of BPM. Similarly, an intelligent BPMS adds data analytics support.

A big set of features gives you far more flexibility in how you automate processes, but these additional capabilities introduce higher costs in several areas, including:
- Software licenses
- Extensive consulting for customization and integration
- Software maintenance and support
- Infrastructure to run the software in-house
- Training

A BPMS isn't the only approach for implementing BPM automation without any limitations. You can also build your own software.

CUSTOM APPLICATION SOFTWARE

Custom software development makes everything possible, provided you have access to a good software development team and a large budget. A software team can either build BPM software from scratch by hard-coding the process in its application logic or use an embedded process engine – part of a developer-centric BPM solution.

Workflow Examples

Once you have selected the approach that will work most effectively for your business – bearing in mind it may be some combination of the four options listed in the previous section – it is time to model your business processes so you can execute them using a workflow management system.

However, starting a process model with a blank page can be a daunting prospect. The following examples offer a number of common processes you can use as a starting point for modeling your own processes.

Each of these workflow examples first describes the process goal, which summarizes what the process should achieve, and the context in which you might automate this process. For each example, the actual process description shows:

- The trigger that starts the process
- Actions that correspond to the steps in the process, with a process diagram
- Roles that people adopt to complete those steps
- Fields that appear on forms to capture and show information about each case

APPROVE VACATION REQUEST

Handling vacation requests is in many ways the epitome of a good process model. Despite the model's simplicity, SAP Signavio Process Governance makes it easier to keep track than when you use spreadsheets and e-mail.

The process goal is to approve an employee's planned vacation dates. Read more about this workflow example: **Approve Vacation Request**.
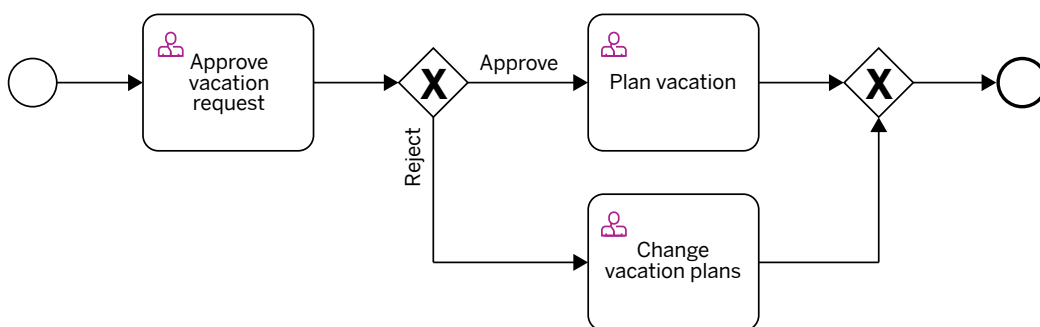
Figure 1: Workflow for Approving a Vacation Request

APPROVE DOCUMENT

Workflows often include approvals, so here's an example of a simple approval workflow. Unlike the vacation request's form-based approval, this example is based on approving a document and includes built-in integrations in SAP Signavio Process Governance for saving files to Google Drive and sending custom notifications by e-mail.

The process goal is to approve the submitted document after optional revision rounds. Read more about this workflow example: **Approve Document**.

APPROVE EXPENSE CLAIM

Form-based approvals aren't just for HR processes. In general, management approvals for budget authorization, where expense claims are the simplest example, also benefit from workflow automation.

The process goal is to submit an expense claim document for someone else to approve. Read more about this workflow example: **Approve Expense Claim**.
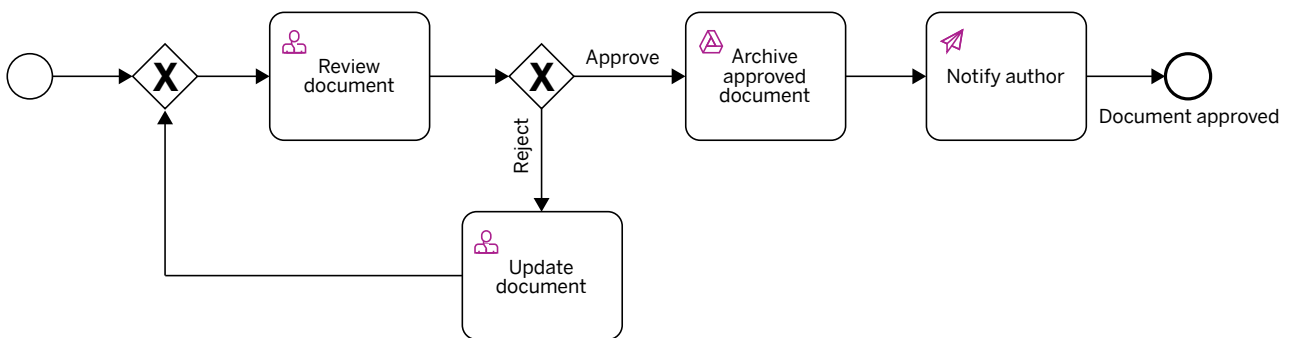
Figure 2: Workflow for Approving a Document
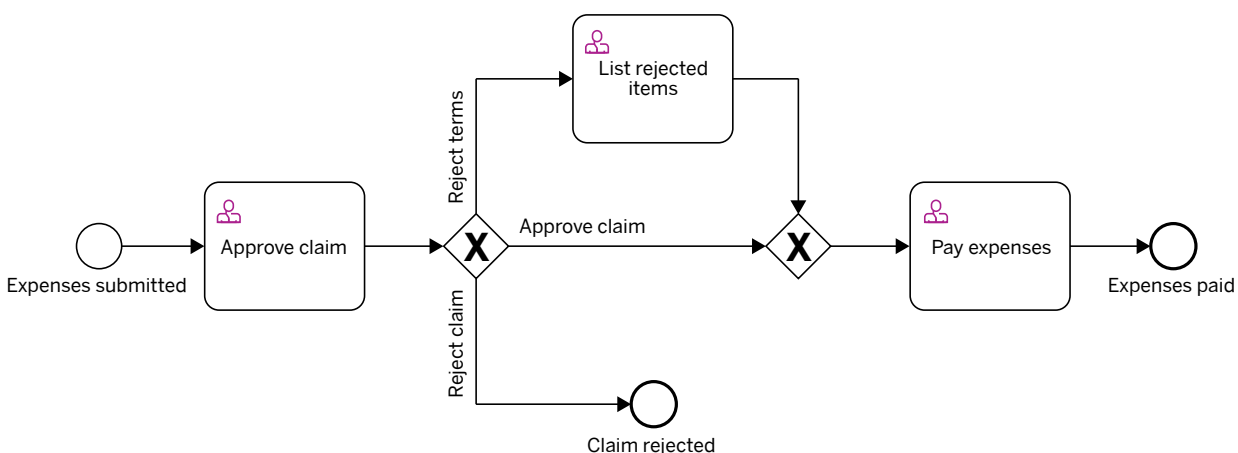
Figure 3: Workflow for Approving an Expense Claim

FILL JOB VACANCY

HR processes often especially benefit from workflow automation because the processes vary too much between companies to make standard software solutions useful. Although HR employees will recognize elements of this process, it would immediately be changed in practice. Fortunately, SAP Signavio Process Governance embraces change with built-in process versioning.

The process goal is to fill a vacant position within the organization. Read more about this workflow example: **Fill Job Vacancy**.

HIRE EMPLOYEE

Not only do companies approach recruitment differently, but there's more than one perspective. This example changes focus from filling a vacancy to responding to a job application, which makes more sense when there are few applicants for positions that generally stay open.

The process goal is to send a job offer letter to a successful job applicant. Read more about this workflow example: **Hire Employee**.
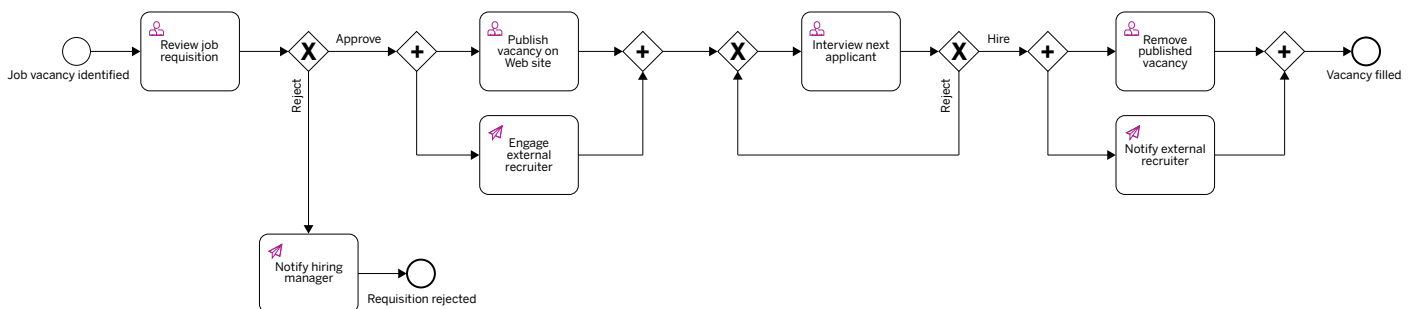
Figure 4: Workflow for Filling a Job Vacancy
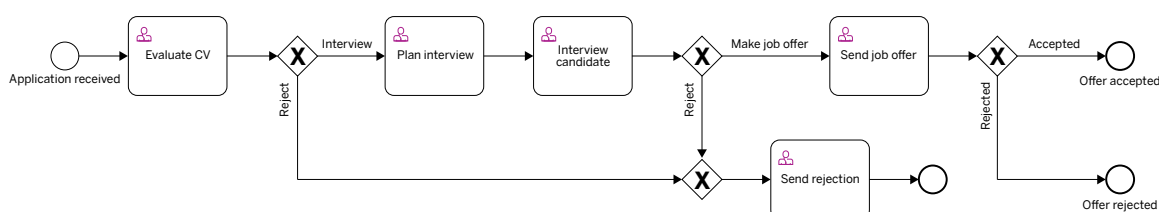
Figure 5: Workflow for Hiring an Employee

OPEN NEW CUSTOMER ACCOUNT

Workflow automation isn't just for central functions; customer-facing departments also have company-specific business processes to manage. This example shows a customer onboarding process for a bank, which you could adapt to customer onboarding for any kind of business.

The process goal is to create a new customer bank account for a retail bank. Read more about this workflow example: **Open New Customer Account**.

PROCESS CLAIM

Industry-specific workflows capture a subject-matter domain's specific language. Even when the actual process is similar to that of a standard software solution, using the correct terminology results in a better user experience. This insurance industry example shows a simplified high-level process, with a technique for separating complex work.

The process goal is to process an insurance claim to make a payout to a customer. Read more about this workflow example: **Process Claim**.
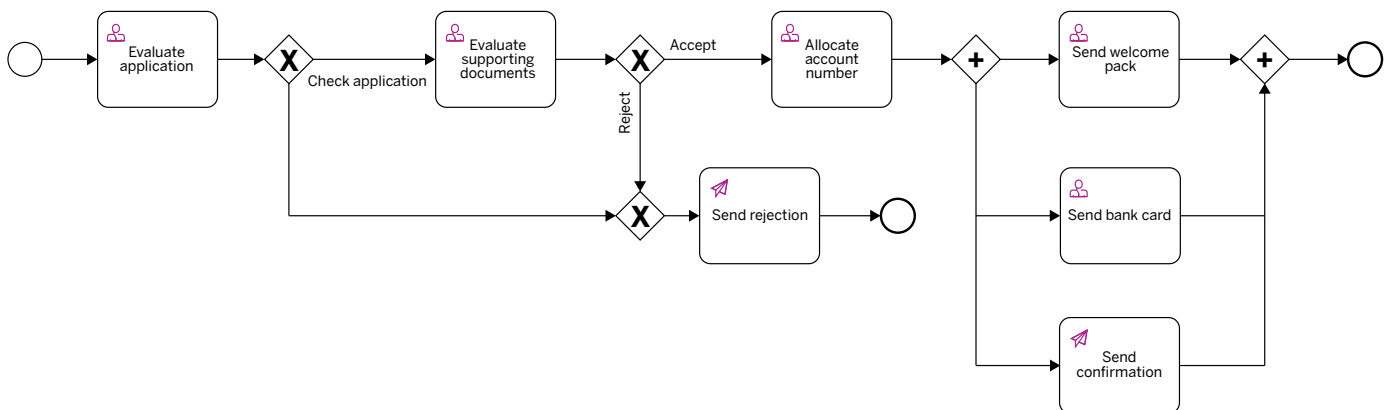
Figure 6: Workflow for Opening a New Customer Account
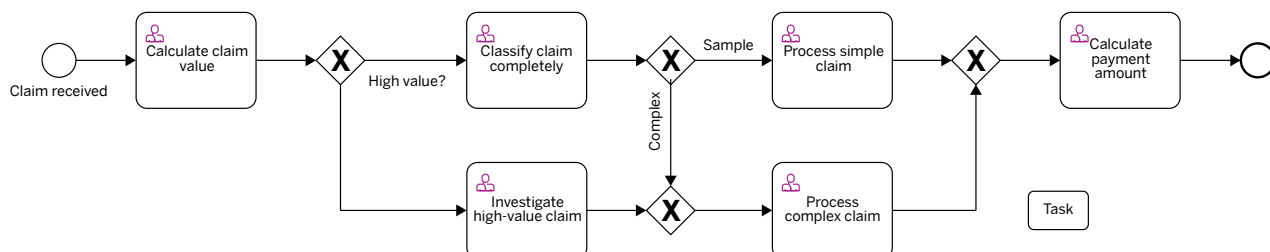
Figure 7: Workflow for Processing an Insurance Claim

FULFILL PURCHASE ORDER

This purchase order process differs from most of the examples because it uses an e-mail trigger. The process starts when a purchase order form is received by e-mail and sent to an address such as orders@example.com.

The process goal is to fulfill a customer's purchase order, for example, by shipping a product and issuing an invoice. Read more about this workflow example: **Purchase Order Fulfillment**.

INVOICE CUSTOMER

Critical processes, such as getting paid, are perfect examples of where you can use workflow automation to avoid delays due to forgotten tasks, slow handovers, and manual notifications. This example uses e-mail notifications and due dates to keep things flowing.

The process goal is to get a customer invoice paid and closed. Read more about this workflow example: **Invoice Customer**.
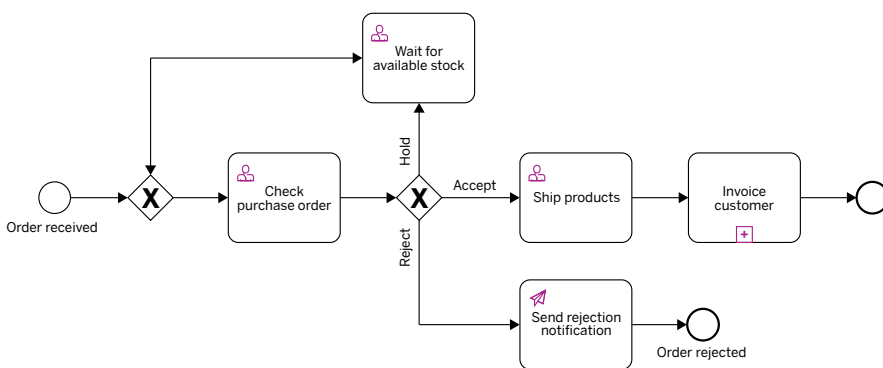
Figure 8: Workflow for Fulfilling a Purchase Order
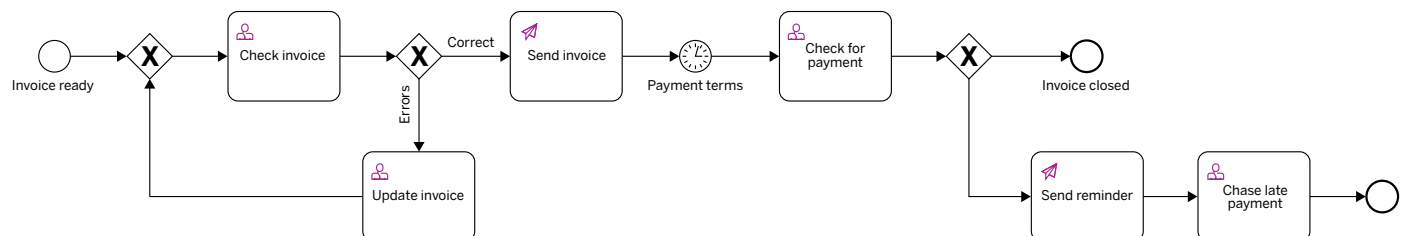
Figure 9: Workflow for Invoicing a Customer

FOLLOW-UP CONTACT

While companies tend to focus on certain kinds of business processes when using workflow automation, workflow management tools can also be applied to any collection of tasks that has outgrown a conventional to-do list. This example shows how workflow automation can help your sales team triage leads that result from meetings.

The process goal is to develop a business contact into a sales opportunity. Read more about this workflow example: **Follow-Up Contact**.
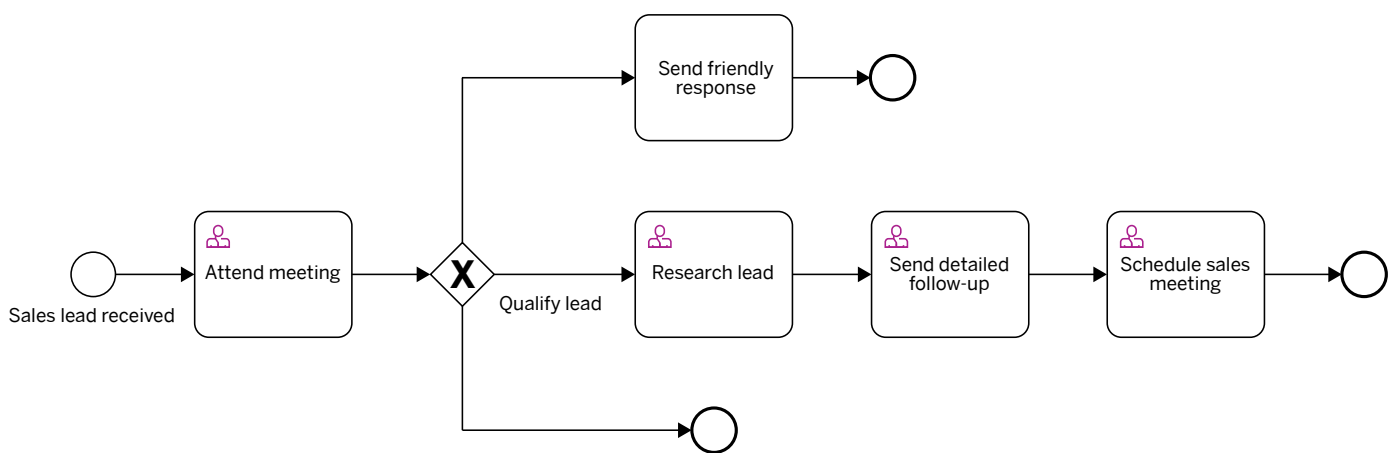
Figure 10: Workflow for Following Up with a Contact

Getting Process Models Up and Running

After you've documented your processes in a process model, the next step is execution: running the process to try it out. Getting started quickly is important because it means you can experiment and get immediate results.

Instead of committing to one plan from the start and being stuck with it, the following steps are an iterative approach to discovering how you can best apply your processes by performing experiments and learning what works:

1. Pick a process to apply first – do one thing at a time
2. Start with SAP Signavio Process Governance – start simple
3. Use the process builder in SAP Signavio Process Governance – start small
4. Run the process in SAP Signavio Process Governance – learn from experiments
5. Iterate the process model – use what you learn and build things up
6. Evaluate the results – choose the best way to automate the process

This is agile BPM, which has a lot in common with agile software development. Once you have the process running, you can refine the process to incrementally improve your application. Discovering a useful process is a good goal for your first experiment, proof of concept, pilot project, or whatever you want to call it.

An important point to remember is the necessity of process optimization. Before a task can be automated, it needs to be optimized. After all, if the quality of the underlying process being automated is poor, you risk still doing the wrong things – just more quickly and cheaply. In practice, this means removing or reducing waste, that is, tasks or activities that are redundant or outdated.

PICK A PROCESS TO APPLY FIRST
Before you start, you need to choose what to automate, as discussed earlier. It isn't easy to choose the first process to automate, and the choice will have a big impact on your first workflow management pilot project.

Again, it is crucial to remember that the process you select should be one that is fully optimized, that is, it has been refined into its most efficient and effective form. Of course, using process modeling software to create models of your processes is an especially useful way of highlighting waste that can be removed, as well as identifying and removing bottlenecks or redundant steps.
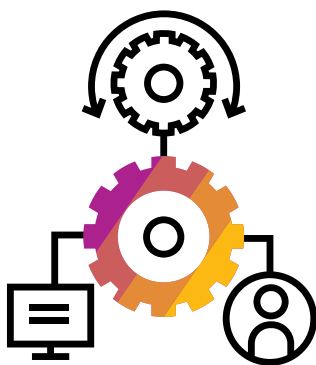
Before a task can be **automated**, it needs to be **optimized**.

Once you are confident that your processes are optimized, choosing a good business process to automate first still involves making trade-offs. The ideal process is:

- Simple enough to be modeled quickly by one person, but complex enough to benefit from software support
- Relevant enough to the organization that off-the-shelf software isn't available, but generic enough to be understood by all stakeholders
- Important enough that improvements deliver real benefits, but not so important that it would be too risky to use new techniques

There are other dimensions to consider, but simplicity, relevance, and complexity are a good start. Good choices tend to be core business processes for small organizations or core processes for a single department in a large organization. These processes may include hiring employees, onboarding new hires, invoicing customers, chasing late payments, or approving and signing off on documents. The sample processes included in the "Workflow Examples" section are good examples of processes broadly suitable for automation.

START WITH SAP SIGNAVIO PROCESS GOVERNANCE

The section "Business Process Software" describes four different business process software categories, with varying cost and complexity. Instead of spending a long time implementing a complex process with complex software, SAP Signavio Process Governance gives you a way to get up and running quickly with a simplified process.

SAP Signavio Process Governance is a good choice to start with, even if you plan to use something more complex later on, because simplified cloud workflow makes it possible to get started quickly while still providing the benefits of a sophisticated workflow solution. It would take more imagination to successfully simulate BPM using spreadsheets and e-mail.

USE THE PROCESS BUILDER IN SAP SIGNAVIO PROCESS GOVERNANCE

Once you've chosen one of your process models and signed up for an account for SAP Signavio Process Governance, you're ready to use the process builder in SAP Signavio Process Governance to automate the process. Building the process is an opportunity to collaborate with colleagues: shared access to the process model in a Web browser simplifies getting input from other people in your organization.
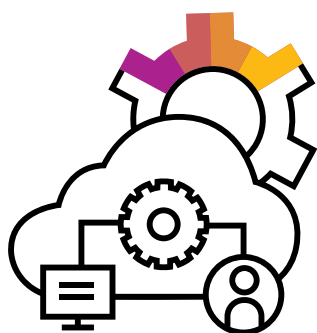
SAP Signavio Process Governance is a good choice to start with, because **simplified cloud workflow** makes it possible to get started quickly while still providing the benefits of a sophisticated workflow solution.

RUN THE PROCESS IN SAP SIGNAVIO PROCESS GOVERNANCE

The next step is to run your process in SAP Signavio Process Governance to see if it works the way you expect it to. This gives you a vital change of perspective, because at runtime the process doesn't look the same as the model.

When your two-dimensional process model becomes a one-dimensional sequence of tasks, you can see problems that weren't evident before. Running the process is a good thing, because it helps you improve it more quickly than by staring at the model.

ITERATE THE PROCESS MODEL

At first, running the process is really testing the process model. The results of this testing are the inspiration for incrementally improving the model, both to fix problems and flesh out the details. This is why it is essential to use a tool that supports process versions and the ability to roll back to earlier versions when changes don't work out as planned.

SAP Signavio Process Governance makes it easier to edit a process model and develop a process incrementally, so you need only start with the essential features of the process, such as tasks and decisions. You can add details such as custom notifications, access control, and automatic reminders later.

EVALUATE THE RESULTS

After you use SAP Signavio Process Governance to automate a workflow, based on your process model, you will be able to run the workflow, coordinate tasks, keep track of workflows in one place, and get visibility of the work.

Once you have run the workflow for the first time, you can expect one of the following scenarios:

- **The process model doesn't make sense.** The next step is to return to the model, make improvements, and try it again. It's critical that you can do this quickly and easily, so you can iterate your process design.
- **Running the process isn't complex enough to benefit from software support.** This is a surprisingly common scenario. People do most of their work just fine without any process support.
- **SAP Signavio Process Governance is just right for running the process.** When this happens, you can avoid a wasted full BPM implementation that can be costly and that risks being ignored.

- **SAP Signavio Process Governance is the right approach but doesn't work because features are missing.** If this is the case, implement your process model using some other solution. If you have the time and money, features may be more important than the simplicity of SAP Signavio Process Governance.
- **You need custom software rather than a workflow tool.** A development team can build custom software that embeds your process model. They will find the prototype of SAP Signavio Process Governance very useful, because it will already have captured the results of many decisions about how to implement the process.

None of these is a bad outcome. The only bad result is when it takes significant resources to discover what the situation really is. The important thing is that you can validate your assumptions and learn about your situation quickly. This is how SAP Signavio Process Governance can deliver real value, saving you time and money, improving your process landscape, and optimizing the way your organization does business.
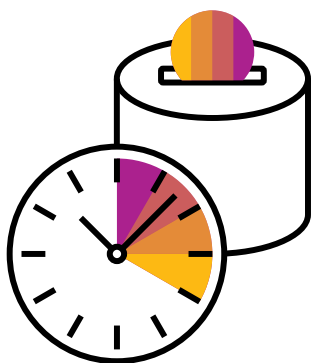
SAP Signavio Process Governance can save you time and money, improve your process landscape, and **optimize the way your organization does business**.

Next Steps

FIND OUT MORE
To learn more about workflow management with SAP Signavio Process Governance, visit us online at **www.signavio.com/contact**.

Take SAP Signavio Process Governance for a test drive and register for your free trial at **www.signavio.com/try**.

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