WHITEPAPER

5 Steps to **BPM Success**

THE DO'S AND DON'TS OF IMPLEMENTING A BPM PROJECT

processmaker

PROCESSMAKER.COM +1.919.289.1377

Table of **Contents**

Introduction

Enterprise software projects have a reputation for running over budget and over time or flat out resulting in failure. When implemented properly, BPM Software projects abet sweeping, transformative changes to an organization's productivity. However, more than 50% of all BPM Software projects fail to deliver the results hoped for. With statistics like these, project managers need to look for every possible advantage in order to do a better job guaranteeing success when implementing software. In this particular eBook, we will explore a series of key recommendations and findings to help you ensure success in your next BPM software implementation.

Step 1: Pick a Place to Start

It sounds obvious to say that you need to pick a place to start. However, this is not as easy as it sounds—there is more hidden in this step than meets the eye.

There are really **two types of customers** that tend to implement a BPMS:

- the Monolith
- the Platform Play

The Monolith Customer

Some customers have a singular, easily identifiable core process that they want to automate. This process is generally a strategic cornerstone of their business. We use the term “Monoliths” to describe this type of customer.

A monolith has no difficulty picking the process to automate, securing internal support for the project, or setting KPIs to define success. In this case, the most difficult decision at the start of the project is usually around whether a Commercial off-the-shelf (COTS) BPMS is the right technology to use or whether the company should build custom software to automate the chosen process.

Developing workflows is the practice of capturing all relevant information that goes into a process: who is involved, what they’re responsible for, how tasks are handed off, which tasks are manual and which are automated.

The Platform Play

For the second type of client, the question is a little more difficult. We call this type of client the Platform Play. As opposed to the Monoliths, the Platform Play wants to implement BPM Software in a more gradual way and typically without the pinpoint clarity outlined by the Monoliths. In many cases these companies have some processes on paper, others are done through a cumbersome combination of Excel and email, and may already automate others with custom code. The processes are generally spread across the organization and the pain is felt in different departments and with differing degrees of urgency. This type of customer will often talk about information Silos when describing the obstacles that hinder overall productivity.

Both Need a Place to Start

Although there are significant differences between the Monoliths and the Platform Plays, there is also a similarity; both need to identify the place to start. The Platform Plays need to identify the one process of many to automate first. Eventually, once a team at the Platform Play has gained proficiency in its BPMS technology of choice then it can begin to automate multiple processes at the same time. The Monoliths have a much clearer path to automating the first process. However, they still face some challenges in deciding where to begin their automation journey.An organization should not tackle a complex process all at once. It is a much better idea to take an agile and iterative approach to implementing and automating even a single process.

The **SIR** Methodology

At ProcessMaker in order to analyze the starting point for your BPMS project, we have developed a methodology we call SIR. SIR is an acronym for the following: **Success**, **Impact**, and **Repeat**.

Success

The first question your organization should ask itself is, **"can we be successful automating this process?"**

You may have a problem that is certainly worth solving, but if success is not probable, then attempting to automate this process first will ensure that your entire BPM project will fail. There are a number of reasons why a process may be difficult to solve, including a lack of technical resources, time, or political support.

Impact

So now we have found a process that we believe we can successfully automate. Now we must ask, **"will anyone care if we are successful?"** Does this process affect enough of the organization to be important? Is it aligned with a strategic initiatives of the organization?

There is a delicate balance between finding an initial process that is both achievable and one that will have a significant positive impact on the organization. Failure by irrelevance is almost as bad as failure because of an unsuccessful implementation. Both types of failure weaken support from the organization and paralyze potential for success.

When trying to determine impact, we also recommend mapping your process initiative and each process against the organization's Key Business Objectives (KBOs).

Repeatability

Finally, we want to ask the question, “is this process something that will be repeatable?” In other words, if you have identified numerous processes to automate, does your starting point have enough in common with the other processes to be useful in your next projects? Will you be creating building blocks that you will be able to reutilize? Repeatability means that you will gain leverage for other processes moving forward. This is very important. Your internal and external stakeholders will expect that your process development efforts will begin to accelerate after the first few processes and that the learning curve will decrease as you move forward. Some of the gains will happen without any planning or additional effort. For example, when you implement your first process you will need to consider things such as installation and implementation of the authentication and security model (probably involving Active Directory or some type of LDAP). When it comes time for the next process, you will have already completed these important steps.

Step 2: Make a Map for Success

Once you have identified the problem and corresponding solution, it is critical to map out what success will look like once you've enacted process automation.

Define how everything will look once you've automated the chosen process:

- What is the exact process to be implemented?
- What reports will you need to control the process?
- What hardware, software, and peripherals are included in the process?
- What Integrations are included in the process?
- What improvements do we expect?
  - Volume
  - Time
  - Defect Rates
  - Satisfaction Rates

How long should it take to automate the process and how many iterations are necessary before a final version? It is important to talk about the answers to these questions with laser-sharp clarity. The planning portion should not feel vague— you will only realize success if you start with very clear and specific objectives.

The SOW & Project Charter

At ProcessMaker we define some of these points in an initial charter document while the rest gets described in detail in the Statement of Work (SOW). The charter document is a collaborative effort with the customer, where we outline the expectations and limitations of the project. This document is then signed by both our team and the customer's team. We always insist that all stakeholders read and sign this critical project launch document.

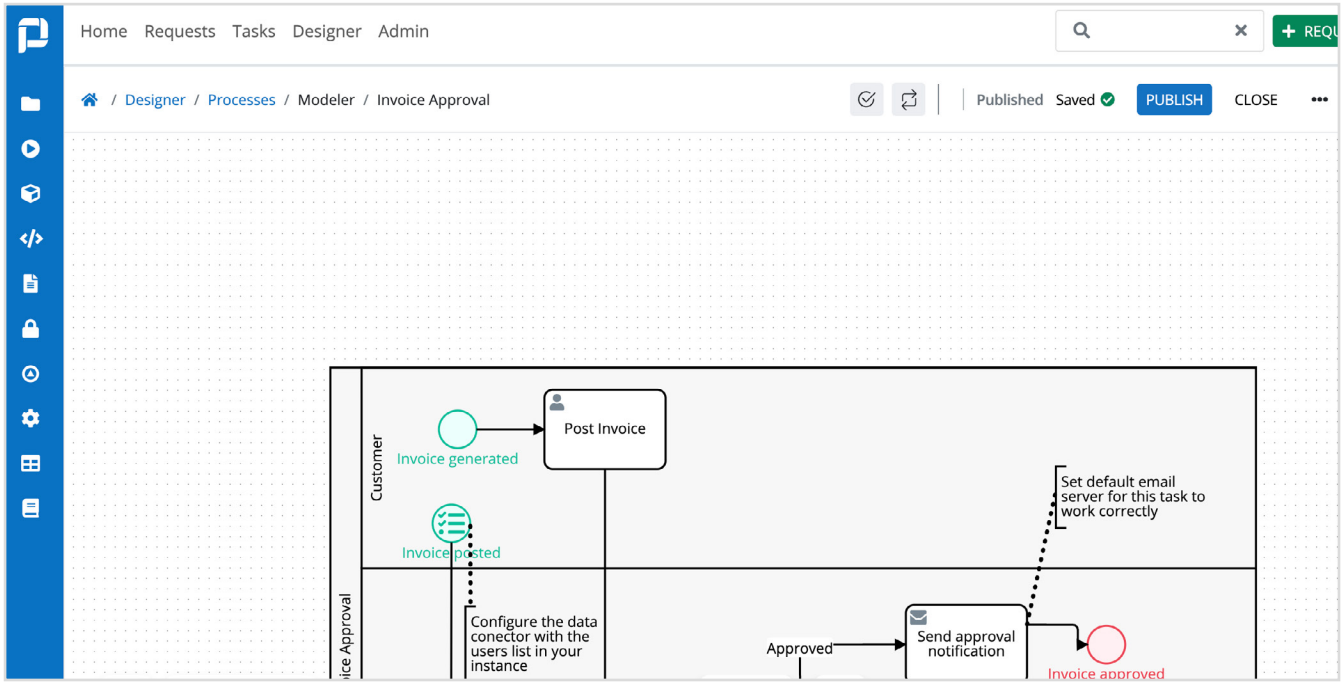
Step 3: Create the Teams

It is important that the client understand from the beginning that the project cannot and will not be successful without the active participation of their entire team. When it comes to implementing automation, success never hinges on a single individual. The project requires eager and committed buy-in from every team member from the outset.

At a minimum the client team should involve the following roles:

- **Executive Sponsor:** This person should be an executive at the organization (ideally C suite level) whose KBOs perfectly align with this specific project.
- **Process Owner:** This will be the most active role on the project. This individual should have excellent global knowledge of the process.
- **IT Representative:** There needs to be a participant from IT that is capable of directing the interconnections to external systems and understanding the authentication and security models.
- **End Users:** Of course, we also need the participation of end users.

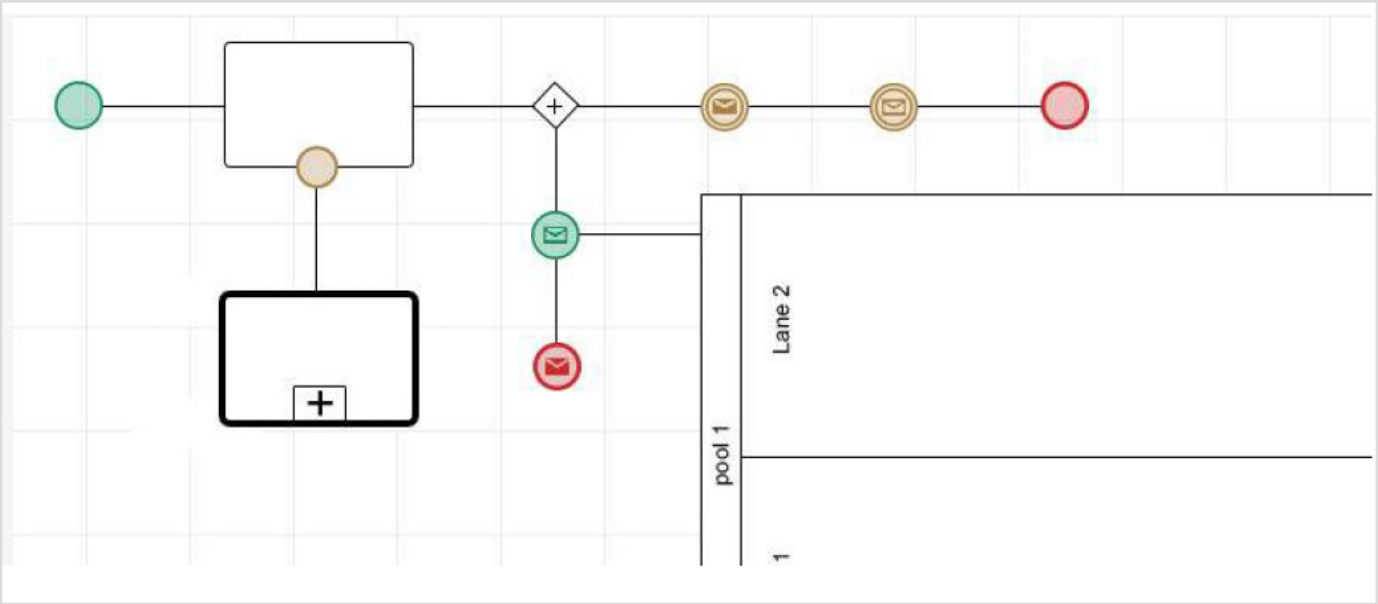
Step 4: Design the First Process



Ok, now we are ready to start designing the process. Each BPM Suite will implement this part slightly differently. For example, in some suites you will need to create a data model before you create user input forms while others do that automatically for the user behind the scenes. In general, most suites follow these steps:

BPMN Designer

Who doesn't love dragging and dropping icons onto a web page and watching their business process materialize before their eyes? Drag-and-drop process designers are notoriously easy to use. Some designers provide better BPMN 2.0 standard support than others. You should decide how important this is for your project.



Designing the Data Model & Forms

What data does your process need to capture? This is the next question to ask yourself when starting to model in the BPM Software. In this case, we need to think about what our forms will look like, what additional data might we need to capture from other systems, and what documents we will add or create during the process.

Designing the Interconnections

When we are creating the data model for the system, you will most likely come across data housed in other systems. Or you may realize that your process will output data that you will want to house in another system. This is often the most technical part of process design. These connections to other systems will eventually require you to decide with your IT team how to access those other systems. Will it be via a REST or SOAP web service? Will you connect directly to a database? Will you import or export an Excel spreadsheet?

Additional Elements

Besides the process, the data, and web services (or other connections), your design will probably call for other elements. These elements will be messages, alerts, and documents. Messages and alerts can be as simple as an email or Twitter tweet. Alerts may be similar in nature. Output documents will be any type of printable documents you might need to produce.

Designing Interfaces

Most BPM Suites have a standard portal for users to access assigned tasks and data. However, many BPM projects require very custom interfaces. How do your customers expect to interact with the system? Will they use standard web and mobile interfaces? Do they need these interfaces embedded in another software, such as email client software (Outlook or Gmail) or their favorite CMS (Drupal or other)? Does it need to be part of a kiosk infrastructure?

A Common Language for Business and Technical Workers

Reports and Dashboards

It is very important that you think about what types of dashboards and reports your stakeholders will expect to use BEFORE you start the project. As previously discussed, you need to understand what success looks like when choosing a BPM project. That decision is directly linked to the determination of what reports and dashboards you will need. This is a very crucial part of your design process to know that you are focusing your efforts on the correct process and the correct parts of the process.

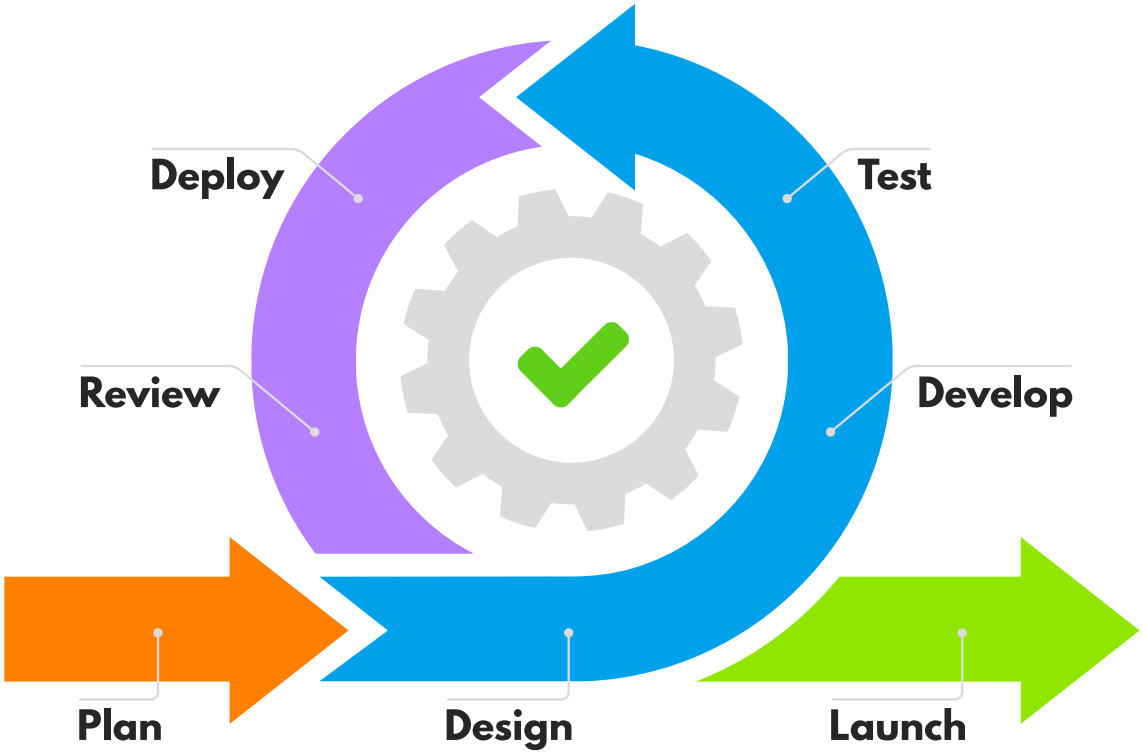
Custom Functionality

Just like the custom interfaces mentioned above, most large BPM projects will have custom requirements. Despite what BPM vendors will tell you, these requirements will require custom programming. That is simply the nature of the beast—so be prepared for it. Make sure you know what generally fits inside a BPM suite and what other custom parts of a system you require for your project.

Step 5: Agile Implementation

Now that you've finished the design process, you have your blueprint for success. It's important to reemphasize this critical factor—**YOU NEED A BLUEPRINT**. Do not simply skip the preparation steps and directly speed ahead to implementation. BPM Suites seem very simple, and for the most part they are. However, process design and project implementation are never simple. Your stakeholders will have fickle opinions and ideas. If you do not nail this down in advance, you will automate a process that your stakeholders won't agree on and later won't use.

Once you do have your blueprint in hand, you are ready to begin the work. At ProcessMaker, we generally work in teams of 4-6 members per project. We find that this gives us the right mix of agility, redundancy (people might leave in the middle of projects), and continuity.



Despite all our best efforts to build a perfect blueprint, it is very difficult to ensure that all stakeholders are in perfect sync. This is another reason why it is very difficult to estimate an entire project with perfect precision. It is also why most will agree that it is better to develop using Agile methodologies. At ProcessMaker our work cycles are based on two week sprints. In each sprint, our goal is to produce iterated versions of the final product wherever possible. These two-week sprints give both our team and the client team the opportunity to collaborate and contribute. Working together throughout the process, it is much easier to detect potential issues or challenges. The client is completely immersed in the development process, making it much more difficult for stakeholder and designer/developer interpretations to diverge very far.

Benefits of Agile Implementation

- It reduces risk because problems can be corrected before your team has invested too much time or effort.
- You can investigate the experience of early users to prevent issues down the road.
- You will be able to train end users in a modular fashion and then utilize these early users as trainers or support people.
- By implementing change at a gradual pace, you can more easily manage the natural aversion to change that often hinders a project's success.

Conclusion

There is an old saying that projects never fail because of bad software; projects fail because of bad project communication. This is absolutely true. Ironically, companies usually spend the vast majority of their time evaluating product features when deciding which BPMS to purchase—but this is a common trap. EInstead, your first step should include a rigorous analysis of project teams and culture fit. Once you've identified a list of harmonious candidates, you can start sifting through features and pricing. We believe that identifying the right culture fit is the lynchpin of success. Partnering with the right BPMS vendor significantly reduces implementation risk and paves the way for a frictionless journey. Even if the BPMS vendor and the implementation partner are different companies, the same truths hold. Worry about which product to pick, but pay equal or greater attention to analyzing the company's values and methodologies to ensure they're in perfect sync with how your organization operates.

About ProcessMaker

ProcessMaker is low-code BPM and workflow software. ProcessMaker makes it easy for business analysts to collaborate with IT to automate complex business processes connecting people and existing company systems. Headquartered in Durham, North Carolina in the United States, ProcessMaker has a partner network spread across 35 countries on five continents. Hundreds of commercial customers, including many Fortune 100 companies, rely on ProcessMaker to digitally transform their core business processes enabling faster decision making, improved compliance, and better performance.

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