

Process Discovery – The First Step of BPM

Table of Contents

Introduction	3
Process Discovery Challenges.....	3
The Problems with Current Options	5
A New Approach to Discovery.....	6
Your Next Step	9
About Lombardi	10

Introduction

Where do we start? Every company considering an investment in Business Process Management (BPM) practices and technology asks this question. How do you pick the process that best addresses corporate objectives, current problems, and feasibility concerns? To answer this question, you must engage people from every part of your business. You must be able to facilitate conversations about goals, responsibilities, problems, and, of course, processes. And these conversations must ultimately result in prioritization of projects and processes that everyone agrees have the biggest impact for your business. This is called process discovery. It is a crucial capability for your organization. In fact, process discovery is most crucial for companies that have committed to BPM as the question quickly evolves to – what do we do next? Answering that question is essential to on-going success with process management.

Until now, the BPM software industry has not helped customers answer these two basic questions. Process discovery has either been made overly complex and inaccessible to the core audience of business users or it has been ignored entirely. “Pick a low risk process that has some impact on the business and get started” is the generic advice from most industry analysts and BPM software companies. This advice does not help much – you need to have performed discovery just to answer it!

This paper provides an overview of why process discovery is critical and what are the challenges of doing it well. It also offers a solution that makes process discovery accessible to your whole organization.

Process Discovery Challenges

Process discovery is simple, in concept. Describe your company’s key processes. This description needs to include key information about processes including activities, responsibilities, problems, and relation to corporate objectives. If you can involve enough people, this level of process description should not take long. In fact, it cannot take long if you are going to succeed with process discovery. This is the first BPM discipline that your company must develop – and potentially the most critical. In a report on BPM, Gartner Research indicates that process discovery might be the most important skill of all – “the most critical practice to master is the initial discovery and definition procedure for the target process.”¹ So what are the biggest challenges you must overcome?

Challenge 1: Getting More People Involved

To do discovery right, you need to engage people from across the business to share their knowledge of the process. Today, some companies try to do discovery by getting key people in a room and spending a few days mapping out the process on the wall. That may work for one or two processes, but it fails for broad based process discovery. If you need to discover even just ten key processes, it will be impossible to get all the “key” people in a room. These ten processes will probably span multiple departments in your business. And the people and teams that need to discuss these processes are geographically dispersed. One Lombardi customer describes this problem as “tyranny of time, place and language.” To succeed with process discovery, you need more people involved from more places.

Challenge 2: Getting The Right Information

Many people assume that process discovery means detailed workflow modeling of a process. That is a mistake. The detailed workflow is just one part of process discovery – and not even the most essential one. The most important information you need to gather about your processes during discovery is: key activities, responsibilities, problems affecting performance and the key goals that this process affects. And every stakeholder needs to agree – or at least have an opportunity to contribute their point of view. Business process owners (e.g. VP Human Resources) may have the best feeling for how this process relates to the big picture of corporate performance, while daily workers (e.g. Recruiting Director) may have the best insight into where the real problems are in the process today. Now expand the scope of this discussion to the dozens – even hundreds -of processes that make up your business. Getting the right information and structuring it in a consistent way is critical.

Challenge 3: Prioritization

Remember that the ultimate goal of process discovery is to answer – what first or what next? The goal is not just documentation – though great documentation is a useful byproduct of effective discovery. To answer “what first?” or “what next?” you need to analyze the process information you have gathered and prioritize the potential benefits of solving process problems. When you are justifying your improvement initiatives to company management, it will be critical to show how the processes you have selected provide the best return to the company.

Challenge 4: Leverage

Now that you have gone through the effort of prioritizing your work, it is crucial that you can quickly move from discovery to implementation of the processes you have selected. It is essential that you can turn the process activities, problems and objectives into an executable process. More importantly, if anything changes when you dive into the details of the process implementation, it is crucial that these changes are reflected back in your higher level process

discovery views. Your discovery level view of processes must be current. Why? Process discovery is not a one time exercise. Once you start implementing processes, you will constantly be asking the question – what next? You will be triaging what has been fixed and what needs to be addressed next. Moving swiftly back and forth between discovery and implementation is crucial for long-term success with BPM. Ultimately, the only way that you will be able to justify process discovery efforts over the long term is if the company gets great leverage from the efforts – both in time to market and effective selection of improvement projects.

The Problems with Current Options

Current technology solutions for these process discovery challenges fall short in addressing the key challenges discussed above. How? Consider the three technologies that companies are presently using for process discovery: BPA, BPMN Modelers and Microsoft Office applications.

Business Process Analysis (BPA) tools like IDS Scheer's ARIS and Proforma ProVision have been around for a long time. They deliver sophisticated enterprise modeling capabilities – including process modeling. Their tools are so sophisticated, in fact, that they are too complex for most business users. Getting started with these tools is hard too – you have to make a significant investment, install servers, set up and conduct end user training. All this setup must be completed just to get your discovery efforts off the ground. In short, the barrier for participation with BPA is too high for the average business user or for the process improvement advocate who needs a simple way to get discovery started. With limited involvement from business teams, it is also almost impossible to do effective prioritization of initiatives. You only have a limited number of processes with no clear consensus on the key problems. This means that – right from the start – you can only do very limited process discovery. So, effective prioritization is impossible. Finally, connections from BPA tools to BPM suites that execute processes are poor – so you do not get the full leverage out of your process discovery efforts. BPA tools fall short on three out of the four key challenges of process discovery.

Some BPM suites offer downloadable BPMN process modelers as a mechanism for process discovery. There are several problems with these applications. They are still too complex for most users. Typically, they support BPMN level modeling for detailed workflow. This is the wrong level of detail for broad discovery initiatives. But that isn't even the biggest problem. The real issue is that these BPMN modeling tools were not built for collaboration. They were built as stand-alone tools for documenting detailed process workflows. So, they do not support meaningful collaboration – the key to process discovery. And since they only support detailed process modeling, they cannot help you prioritize and will likely result in people getting mired in the details of a specific process. All of these limitations are toxic to your process discovery efforts. Since

they do not adequately address any of the key challenges of process discovery, BPMN modeling tools will ultimately set your process discovery efforts back – not forward.

Some companies try to use the tools that are broadly available to their employees. In some cases, this is Visio. However, PowerPoint, Word and Excel are the overwhelming choices of business users for structuring information about processes. Since everyone has these applications and can use them, broad participation is possible and even a basic form of collaboration is enabled through email and shared file servers. Getting started is easy. However, these tools do not enforce a consistent structure to the information. So, different teams will capture different levels of information about their processes. This means there is no practical way to aggregate information from diverse processes. So there is no effective means of doing process and project prioritization. And since the information is structured inconsistently, there is little to no leverage from this documentation as you move from discovery to implementation of your target processes. Ultimately, the accessibility and unstructured nature of Microsoft Office tools are their biggest downfalls as a solution for process discovery.

A New Approach to Discovery

We built Lombardi Blueprint to address all the challenges of process discovery and give companies the fastest way to get started. How?

Participation and collaboration is the focus. Blueprint is available on-demand through a browser. This Software as a Service (SaaS) model fits process discovery perfectly. There is nothing to install in order to get started and nothing to install when you are invited by another team member to log in and collaborate. We also focus on ease of use. Building a process map in Blueprint is as easy as building a slide in PowerPoint or an outline in Word. Just type in the information and Blueprint automatically creates the picture. No training necessary. Figure 1 below shows how easy it is to map processes using this outline approach.

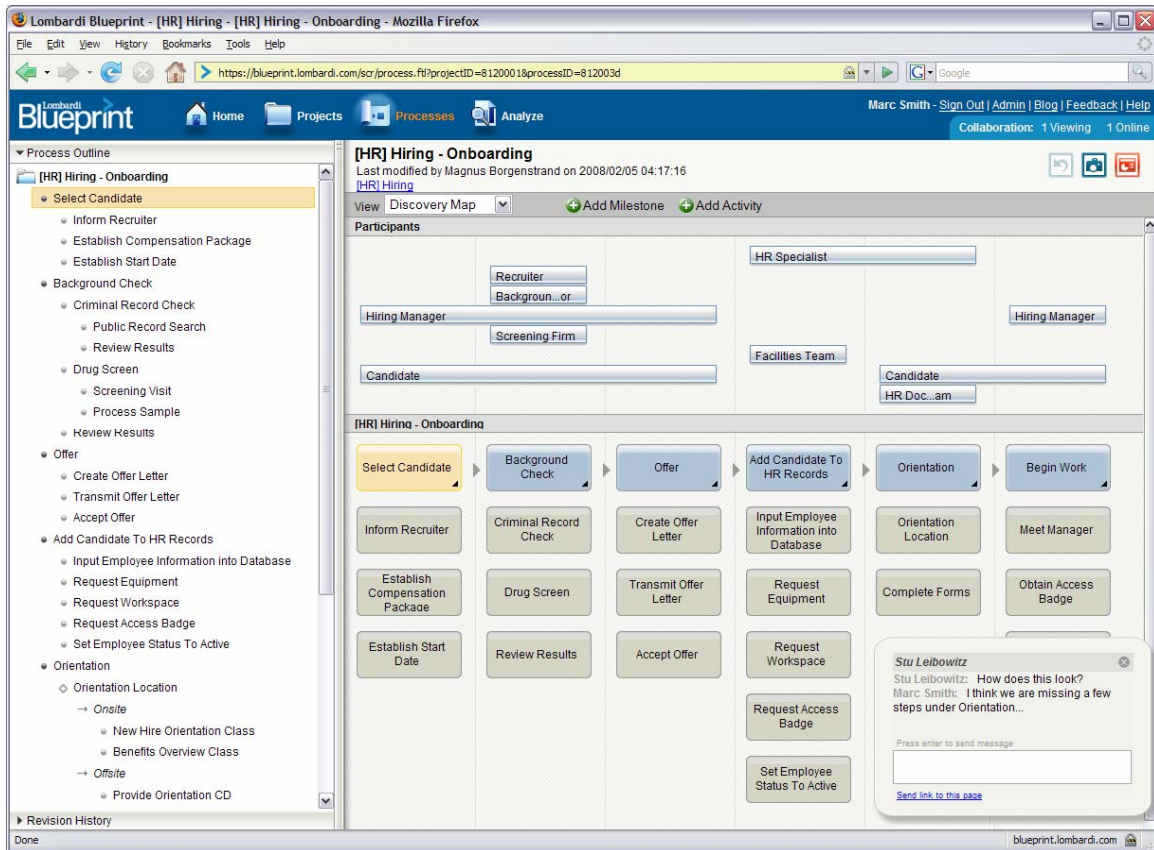


Figure 1: Mapping Business Processes Collaboratively in Blueprint

Blueprint also facilitates collaboration across the team. In fact, the Blueprint workspace is shared in real-time. This means anyone viewing a page you are working on automatically sees your changes in real-time. And they can also make changes to the same picture in real-time. When process questions reach outside the current team's expertise, additional 'experts' can join in the discovery effort. Need to talk about your disagreements? Just initiate a chat from inside Blueprint. Since Blueprint keeps track of every change made by every person, you can always see exactly what changes others have made and roll back changes that people disagree with. Our use of the latest web technologies (e.g. wikis, presence) delivers the most collaborative information gathering environment available in any market today. There is no peer in the BPM market. Participation in process discovery could not be easier or more powerful.

Now that you have a simple way of getting everyone involved, Blueprint makes sure you are gathering the essential information. For each process, Blueprint helps gather information about activities, participants, inputs and outputs, problems and impact on overall goals. These last two areas – problems and goals – are critical for prioritization of improvement efforts. Now you have a

simple, standard way of gathering this information across every process that you document in Blueprint. In addition, Blueprint helps guide you through the process discovery process – telling you what information to gather next to move towards prioritization.

As discussed, process discovery is as much about prioritization as it is documentation. Blueprint uses the information you enter about corporate goals and process problems to provide an impact analysis. This consolidated view is critical when you consider the challenge of understanding improvement opportunities across tens or hundreds of processes. Figure 2 below shows Blueprint’s Analysis view that shows you exactly where to focus your improvement efforts.

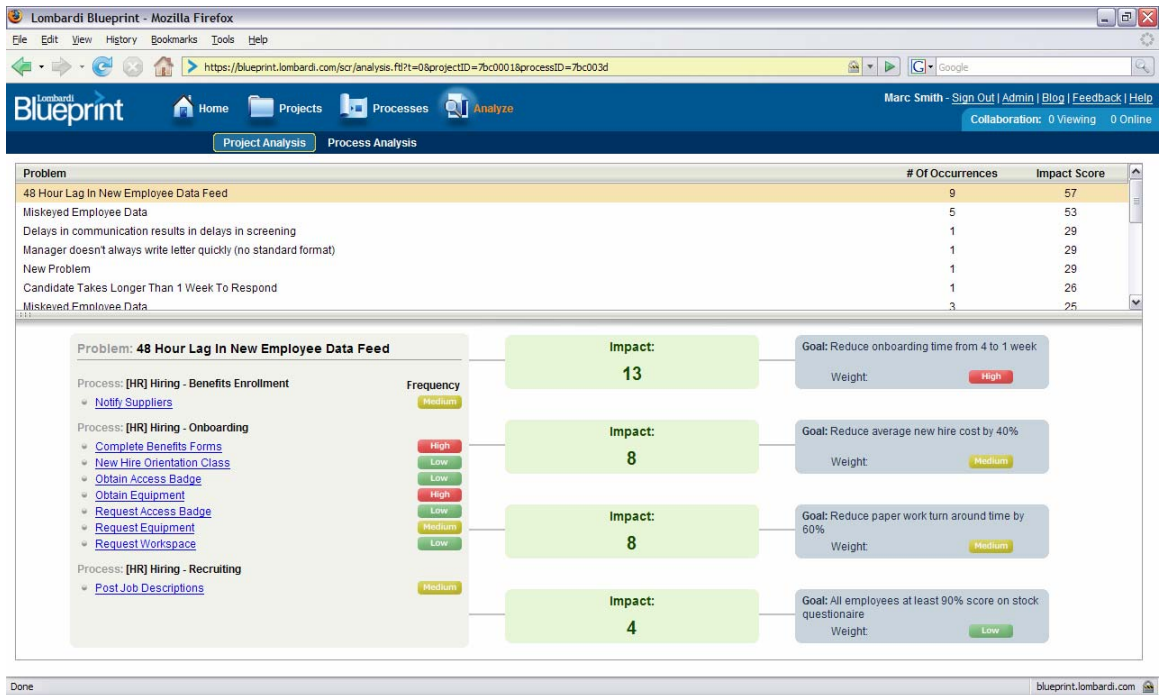


Figure 2: Prioritizing Improvement Opportunities in Blueprint

Blueprint also ensures that you are able to leverage all of the information that you gather. First, you can with the click of a button to automatically generate a complete PowerPoint presentation that describes every aspect of your process. Why would you need to do this? If you need to present your process initiative to senior management, you would probably use PowerPoint to do that. Perhaps executive team just wants to see the key aspects of your project – team, high-level map, problems, and goals impacted. Blueprint generates all of that for you. In addition, it also generates a slide for every activity with all of the information you have gathered. So, you can also get detailed process documentation at the click of a button. The second area where Blueprint

gives you leverage is through integration with Teamworks, the industry leading BPM suite for executing and optimizing business processes. You can publish any process mapped and modeled in Blueprint directly into the Teamworks. This speeds the deployment of your target processes. Since Blueprint uses the Business Process Definition Metamodel (BPDM) standard from the Object Management Group (OMG) for publishing process information, any process tool that supports this standard can also leverage Blueprint data.

Your Next Step

Process discovery is the first step for you to take if you are considering BPM. Even if you have not decided yet to focus on BPM or if you are trying to evangelize BPM as a discipline in your company – process discovery is the best first step. Fortunately, Lombardi Blueprint removes all the hurdles to getting started. All you need to do is register for an account at <http://blueprint.lombardi.com>. Beyond getting started, Blueprint also delivers all the capabilities you will need to succeed with process discovery at your company – participation, collaboration, prioritization, and leverage. No other option on the market today solves the big challenges of process discovery. In fact, many of these options could set your discovery efforts back many steps. So, take the right first step and get started with Blueprint today.

About Lombardi

Lombardi is a leader in business process management (BPM) software for companies, systems integrators and government agencies of all sizes. We offer award-winning BPM technology, know-how and services to help our customers succeed with their process improvement initiatives. Our products are built on open standards, and provide ongoing prioritization, planning, visibility and control of business processes, increasing the speed and flexibility with which organizations can manage their business process activities and decision-making.

Teamworks® is Lombardi's BPM software for designing, executing, and improving processes. Teamworks for Office™ makes it easy for anyone to participate in BPM using the familiar Microsoft® Office System products. And Lombardi Blueprint™ is the only on-demand, collaborative process documenting tool that enables companies to map processes, identify problems and prioritize improvement opportunities. At the core is Lombardi's unique shared model architecture, which significantly reduces the time and effort versus competing solutions.

Lombardi is behind some of the largest, most successful BPM implementations in the world. Our customers include Allianz Group, Aflac, Banco Espirito Santo, Barclays Global Investors, Dell, El Paso Energy, FETAC, Financial Services Authority, Ford Motor Company, Hasbro, ING Direct, Intel, Maritz Travel, National Bank of Canada, National Institute of Health, Safety-Kleen, T-Mobile, UCLH, Xbridge and numerous governmental agencies.

