The Ultimate Guide to Business Process Management

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General Ideas

- As long as you have Process Management you can always adapt, regardless the environment
- BPM is about improving the way work gets done

Introduction

- BPM has 5 functions

Function analysis:	Assesses functions, guides strategy, finds growth.
Service analysis:	Identifies manual tasks, prepares for automation.
Process analysis:	Reviews end to end processes, finds improvements.
Information analysis:	Maps info flow, finds gaps, optimizes channels.
Workflow analysis:	Assesses data flow across apps, networks, systems.

The book focusses on Process Analysis since the other functions of BPM are ususally performed by IT spericalists

5 Tasks to take in BPM

Business Strategy	• Defines long term direction and growth opportunities. • Creates road maps and blueprints for the organization.
Business Architecture	• Designs structures, roles, governance, and systems needed to realize the strategy.
Business Process Management (BPM)	• Models end to end processes from customer to customer. • Ensures efficiency and cost effectiveness in daily operations.
Lean	• Identifies and removes waste in processes. • Improves speed and visual management of operations.
Six Sigma	• Uses data and statistics to measure process performance. • Reduces variability and optimizes efficiency.

BPM Center of Excellence (CoE)

4 Layers of CoE

Performance Layer	Sets BPM goals and best practices. Manages repository, ensures consistency, reviews projects, drives savings.
Business Layer	Defines how the CoE is run. Covers people, process, governance, technology as the four pillars.
Service Layer	Provides services like training, modeling, analysis. Clarifies roles and responsibilities of BPM teams.
Technology Layer	Maintains central process repository and BPM tools. Ensures standards, version control, single source of truth.

4 Pillars of BPM CoE

People

Defines roles, skills, and responsibilities. Ensures the right expertise is available to drive BPM initiatives.

Process

Provides the methods, standards, and frameworks for how processes are modeled, improved, and managed.

Process Modeling Techniques

Process Maps	Static flat drawings, isolated view, time intensive, no dynamic changes.
Process Models	Dynamic, tool based, end to end, changes cascade, allow simulations.
Flowcharts	Basic standard, sequential flow, simple notation, one behavioral view.
RACI Matrix / Functional Decomposition	RACI clarifies stakeholder roles. Functional decomposition lists processes with owners before modeling. who needs to be responsible, accountable, consulted and informed

Business Process Management Notation (BPMN)

= The standardized way to document business processes

Flow objects	Events start or end processes, activities are tasks, gateways split or merge flows.
Connecting objects	Link tasks through sequence flows, message flows, and associations. Show the flow of information
Swim lanes	Organize activities by participants (pools) and roles (lanes).
Artifacts	Add context with data objects, groups, and annotations.

Create a Process Hierarchy

Collect every process model used in the organization.

1. Tag each process with a unique ID for consistent placement.
2. Apply APQC's Process Classification Framework (PCF) as best practice taxonomy.
3. Connect processes directly to business services, products, and activities
4. Standardize naming, structure, and avoid ad hoc development.
5. Arrange processes in a tree structure with clear classes and categories.
6. Enable staff to see gaps, overlaps, and relationships across business lines

Organization Value Chain

Operations:

1. Procurement
2. Inbound Logistics
3. Production

Governance

= Directing and organizing activities around processes between business and IT

- Establishes rules, oversight, and decision making to ensure BPM is consistent, compliant, and aligned with strategy.

- Clearly describe the roles and rules of the system in a set of documents

BPM Activity Cycle

Define	Client submits formal work request. CoE manager approves before work begins.
Design	Analyst drafts process model with client input. Only draft model is delivered.
Simulate	Test model using tool, workshop, or external reviewer. Identify issues and gather feedback.
Deploy	Roll out process with business architects and stewards. Train and brief stakeholders.
Execute	Make process operational. Provide support and resolve early problems. May phase rollout.
Monitor	Collect feedback through reports, surveys, or workshops. Check results against expectations.
Analyze	Review and assess feedback. Run further simulations if needed. Agree on recommendations.
Optimize	Implement improvements and create procedure documentation.

Checklist for Standards

Modeling
- Create a functional decomposition matrix first to ensure end-to-end view and avoid rework

Formatting
- Use BPMN 1.2 or 2.0 so models support metrics and automation
- Keep all notation symbols same size for consistency
- Space symbols evenly for clarity
- Place model title at top center for identification
- Add hierarchy number top right to align with process architecture
- Add version and last edited date bottom right for traceability
- Add author name bottom left to show ownership and contact point

Gateways
- Use exclusive gateways when only one path is followed
- Use inclusive gateways when one or more paths can be followed
- Use parallel gateways when all paths must be followed
- Ensure criteria are clear and percentages add up to 100%

Tasks / Activities / Sub-processes
- Break down tasks into sub-processes if needed for detail
- Keep sub-processes self-contained with no flows crossing boundaries
- Label tasks with verb-noun format, max four words, to describe action clearly

Events
- All processes must start and end with events
- Label events with trigger description for clarity

Flows
- Message flows connect tasks or events, not gateways
- Sequence flows connect elements in same pool
- Message flows used only between pools
- Avoid overlapping lines to keep flow easy to read

Other
- All diagram elements must connect to the process, no floating shapes
- Document the full end-to-end process for redesign and improvement

Technology

Supplies the tools and repositories that support modeling, automation, monitoring, and knowledge sharing.

4. Outbound Logistics
5. Sales
6. Customer Service

Support:

7. Business Vision & Strategy
8. Finance
9. Administration
10. Human Resources
11. Marketing
12. Information Technology

Process Measurement

- Measure the "as-is" process first
- Develop a Data collection plan for what has to be measured and how

- data should consist of:
  - throughput time
  - cycle time
  - queue time
  - activity costing
  - Full Time Employee (FTE) numbers
  - service level agreements (SLA's) for the business process.

- Efficiency, cost and quality are improved in
  - Staff utilization
  - Activity Costing
  - Capacity Planning

- Define business rules for each symbol to capture logic
- Identify key activities and gateways early for accuracy
- Keep activities and gateways in correct logical order
- Include all data objects used to show process inputs and outputs
- Add links to related maps where needed for navigation
- Model swim lanes and pools correctly to represent roles and entities

Procedure Guide Standards

- Use organizational template for consistent look and feel
- Ensure guide steps match process model steps
- Apply correct formatting for readability
- Keep screenshots max width 13.5 cm for fit
- Add borders to screenshots for clarity
- Number steps sequentially to avoid confusion
- Use bold for clickable or selectable items in instructions
- Avoid bold for names of windows or notes
- Use italics for documents, reports, and procedures
- End each procedure with "End of procedure" inside table cell
- Use "End of process" outside table if needed
- Run spelling and grammar check in Word
- Proofread manually to catch context errors
- Use consistent tense and voice throughout
- Update bookmarks and references for accuracy
- Keep references current and correct
- Check that hyperlinks work
- Attach supporting documents in appendix if relevant

BPM Maturity Model

0. Non-existent	No BPM maturity, issue not recognized.
1. Initial	Issue recognized but only ad hoc, disorganized approaches, reliant on individuals.
2. Managed	Similar procedures within tasks, weak documentation, no training, errors likely.
3. Standardize	Processes documented, trained, and mandated. Focus on consistency and basic automation.
4. Predictable	Processes monitored and measured. Results predictable, partial use of BPM tools.
5. Innovating	Fully optimized and integrated. Continuous improvement, strong IT support, adaptive enterprise.