

5 Steps to Choosing the Right BPM Suite

BPM Suites can deliver significant business benefits and a fast ROI – but only if you choose the right one...

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Why BPM & What is a BPM Suite?

The focus on Business Process Management (BPM) as an organizational discipline has grown rapidly. It makes sense that business process management is moving to the forefront of executive agendas because processes are the foundation of any organization and business processes influence all of an organization's key performance objectives – including customer service, financial performance, compliance, productivity, and competitive advantage. How well these processes are executed ultimately determines the success or failure of an organization.

Along with this increased focus on process management and improvement has come an evolution in the technology available to help automate, integrate, monitor, and adjust processes. The market for BPM software and related services is growing at a rate of 15-35% a year according to various analyst forecasts. This growth is driven largely by the fact that the technology is maturing and there are numerous end-user case studies that validate that it works. BPM software has been proven to increase efficiency, control, and agility across mission-critical processes, and that has resulted in a significant return on investment and a competitive lead for the early adopters of the technology.

If you are just now thinking about adopting BPM technology, there is good news and bad news. The bad news is that you are behind the early adopters. The good news is that you can take advantage of the lessons learned and the advancements in BPM software that have emerged as the technology has matured – giving you the power to go beyond basic process automation to quickly improve processes and significantly improve your agility.

In the past five years, BPM software evolved from its early roots in workflow to more comprehensive “pure-play” BPM software that offers graphical process design, process automation, and process monitoring and reporting capabilities for human-centric processes. It is this pure-play BPM software that has delivered such strong results for organizations worldwide and helped to drive the increased interest in BPM. However, during this transition, the Enterprise Application Integration (EAI) providers continued to address the need for complex integration and automation of system-based processes, the Business Intelligence (BI) providers continued to meet corporate performance management needs, and the Business Process Analysis (BPA) vendors catered to organizations with more advanced process modeling and simulation needs. While all are critical to business success, this segmentation of the technology market poses a challenge for buyers and IT organizations who need to purchase multiple applications and then piece them all together. It is a cost, time, and maintenance headache. This has led several of the leading pure-play BPM vendors to take the lead in expanding their solutions to encompass all of these areas – providing what has become known as a “BPM Suite.”

A true BPM Suite will allow you to address the full, roundtrip process life-cycle for both human-centric and system-based processes with a single, integrated solution from a single vendor. The full roundtrip process life-cycle includes modeling, integration, automation, management, monitoring, analysis, simulation, and improvement – with the goal being to create the agility needed to continually repeat this cycle and fine-tune and optimize your business on a near real-time basis.

Choosing a BPM Suite, rather than a series of disparate applications, will significantly decrease your costs, increase your time to benefit, and increase your flexibility and agility in managing and improving multiple processes.

Best Practice Steps for Choosing a BPM Suite

For you to fully take advantage of the latest, most proven BPM Suite technology, you must first understand the options available to you and then ensure you choose the right solution for your organization. This paper outlines an approach for choosing a BPM Suite – this approach will allow you to quickly cut through the marketing hype, shorten your evaluation period, and give you greater confidence in the solution you select. While speed in decision-making is not the only factor, it is critical that you do not delay the selection process too long or you will continue to fall further behind the organizations that are already reaping the rewards of BPM.

Five best practice steps for choosing the right BPM Suite solution for your organization are:

1. Determine the scope of your process management needs.
2. Understand what the BPM “essentials” are and then determine what additional advanced features you need.
3. Based on what you discovered in Steps 1 and 2, document your requirements and weight priorities.
4. Identify a short list of vendors.
5. Conduct vendor evaluations and engage in proof-of-concepts.

More on each of these five steps is outlined below. Follow this methodology and you will be well on your way to improving your core business processes and realizing the benefits the right BPM Suite can deliver.

Step 1 Determine Scope of Process Needs	Step 2 Understand BPM Essentials vs. Advanced Features	Step 3: Document Requirements & Weight Priorities	Step 4: Identify Short List of Vendors	Step 5: Conduct Vendor Evaluations
Best Practice Selection Considerations for Each Step				
Human-centric processes, system-based processes or both	Automate, manage, and control are the basics	Identify short-term vs. long-term needs	Vendor maturity and track record	Proof-of-concept and prototype of key requirements
# of processes, process complexity	Look beyond the basics – BI, BAM, advanced modeling, content mgmt	Identify first processes to be addressed	Customer results	Check customer references
# of users and locations	Look at analyst research to help identify key functional requirements	Outline both functional requirements as well as other criteria (e.g. vendor track record)	Product maturity and strength	Consult with analysts
IT infrastructure complexity – how diverse	Interoperability with existing applications – how easy is it to connect them	Document the “must have” as well as “nice to have” features	Industry experience and geographic reach	Assess past performance
Geographic support requirements	Advanced features offer opportunity for leadership	Identify what is not important to avoid distractions	Training and service offerings; ability to support and innovate solution	Consider vendor track record and vision to support your long-term needs

Step 1: Determine the scope of your process management needs.

Determine the scope of your process management needs. Some of the questions to answer during this step are:

- What are your most critical processes?
- How many of them are human-centric versus system-centric?
- What are your scalability requirements in terms of the number of processes, number of locations, and geographic deployment?
- How complex is your IT infrastructure? What platforms do you need to interoperate with to be successful? Is achieving a service-oriented architecture part of your overall strategy?
- What are your short-term versus long-term process needs?

Be sure to include people from the both the business side and the IT side of your organization in the scope definition and in the BPM Suite evaluation and selection process. Both business users and IT managers are critical to any BPM project's success, so involving them early is important.

Step 2: Understand what the BPM “essentials” are versus more advanced BPM features.

In order for you to be successful, there are certain essential elements that must be present in your BPM solution. Without these, your implementation is likely to be longer, more painful and less beneficial than it potentially could be – and it may fail altogether. First and foremost, a BPM Suite must be able to address both your human-centric and system-based processes because both are critical to your business. Beyond that, essential features to evaluate include the ability to:

Design and model a process in a graphical format that can be owned and maintained by the process owner and can be easily published for process execution. Separate business rules, forms, and roles from process flow for easier maintenance;

- Execute and manage both simple and complex processes via a robust, scalable process engine;
- Create online forms that will flow through a process – helping you eliminate paper;
- Accommodate dynamic roles within an organization and automatically adapt content and key performance data to give each individual their own unique “view point” into a process;
- Provide a single user view across an entire process and enable accessibility through a variety of portals – such as SharePoint, Outlook, the Web, and mobile devices;
- Easily provide access to, manage, and control the content that people need in order to make intelligent decisions during the process and to generate an automatic audit trail for compliance;

- Monitor process activity, obtain instantaneous visibility into process content and status, and generate reports to facilitate process improvement;
- Simulate the impact of process changes using live process data and enable real-time changes or additions to process flows, roles, and forms and the ability to quickly and easily add new processes without slowing down or impacting business operations;
- Easily integrate with a wide variety of disparate applications – across .NET, Java, and legacy frameworks – so that you can fully leverage your existing infrastructure and extend the benefits you get from BPM across your enterprise;
- Leverage the latest technologies, such as web services, and provide a framework that will help you move toward a service-oriented architecture (SOA) environment to ensure optimum interoperability;
- Easily configure the solution to meet your unique process needs.

In addition to the essential features outlined above, the best BPM Suites will also offer more advanced capabilities. While you need to weigh which of these advanced features are most important to you in the short-term, you also need to take into consideration what you will want to leverage in the future. These advanced capabilities offer the potential for you to surpass other organizations by taking process improvement to the next level – and break away from your competition. Important advanced features to evaluate in a BPM Suite include:

- Advanced reporting and business intelligence capabilities that allow you to analyze both real-time and historical data and look at time-phased performance. This capability should be an integrated part of the BPM Suite and should leverage the live process database so you can base decisions on actual, up to the minute information;
- Advanced business rules management is important if you need to manage and maintain large rule sets and leverage them across multiple processes or if you want to empower the system to analyze and automatically execute different process flows based on certain conditions. This allows you to automate large portions of the process and minimize the impact of rule changes while at the same time ensuring consistent enforcement of policies across the company and across processes;
- Advanced modeling and simulation gives you the ability to not only model graphical representations of a process, but also to simulate the impacts of changes to a process to measure its effect on numerous variables including cost, profitability, resource utilization, throughput speed, and other critical business objectives. The modeling and simulation environment must be coupled with the rest of the BPM Suite to ensure you are working off of accurate, live process data and to ensure that process changes can be applied quickly from the simulation environment to the execution environment. Statistical analysis models, such as Six Sigma, should be readily available and work within the simulation environment. Robust

capabilities in this area are critical to process improvement;

- Advanced integration and legacy control features are especially critical to organizations with a large number of system-based processes or an extremely heterogeneous IT environment. Advanced integration capabilities will support not only point-to-point communication but also allow the BPM Suite to manage and control processes executing on other systems, so that the BPM Suite remains the top-level orchestrator of the entire process. In addition to greater control and visibility, it also allows you to analyze and improve the performance of legacy applications. If you rely on mainframe systems, look for capabilities to easily access and manage those applications within processes running on the BPM Suite.

While many of these advanced features are offered as standalone applications by a variety of vendors, only by tying them into a BPM Suite do you gain the benefits of a faster implementation, single interface, single vendor support, and lower total cost of ownership. If you already own one or more of these technologies, the best BPM Suite providers will have a mechanism to quickly link into your existing applications, often through a packaged connector.

Finally, understand how BPM interacts with other functional areas, such as content/document management, business performance management, and business activity monitoring. This understanding will be important during the selection process as it will help you measure the robustness of various solutions. Rate how important it is that you tie these areas into the overall solution.

Step 3: Document your requirements and weight priorities.

After you understand the BPM essentials and the advanced BPM features available in a BPM Suite, document what is most important to you and outline a focused requirements document to drive the evaluation process. Include both functional and company performance requirements in your document to ensure you look not only at the product but at the vendor who will be supporting you. In addition to knowing what is important to you, outline what is not important. This will serve as a reminder to the evaluation team not to get distracted by “cool” but unnecessary product features and extensive sales pitches. Stay focused during your evaluation.

Step 4: Identify a short list of vendors.

The first step in identifying a short list of vendors is narrowing the options by eliminating the vendors who are not BPM Suite providers. Many vendors are marketing products under the “BPM” umbrella, but only some of these vendors have products that provide the depth you need to institute true, effective full life-cycle process management throughout your organization. For example, content management and middleware vendors may provide workflow in their offerings, but they are not true BPM companies and will not be able to provide you with a complete, proven BPM Suite.

Once you have isolated the playing field to those vendors who specialize in BPM, you can narrow your choices even further by evaluating a company's market leadership position, performance, maturity, and vision. How do you identify these established vendors? Look for companies that have been in business for awhile, have a strong customer base, and consistently rate well in industry analyst research published by the top firms – such as Gartner, Forrester, and Butler. In addition to established leadership, another key vendor assessment area should be company performance. In today's market environment, company results are critical to making an investment. Look for a seasoned management team, consecutive quarterly growth, profitability, customer acquisition rate, strategic partnerships, and overall strategy. You want a vendor who has an established, successful customer base and one that is growing and will continue to dominate the market. If international or multi-national operations are important to you, look for a vendor with broad geographic reach and a presence in your desired regions. On the product side, you should expect to see clear direction from the vendor on maintaining technology excellence. Areas to consider are the maturity of the product, the strength of the product roadmap, and the vendor's commitment to BPM software excellence and innovation. Finally, if you do nothing else, check customer references and results. Look for documented case studies and public displays of endorsement from customers – if a customer is willing to go out of their way to talk about the results, chances are the solution not only delivered results, but exceeded expectations.

Step 5: Conduct vendor evaluations and engage in proof-of-concepts.

As you engage in vendor evaluations, stick to your requirements to make sure you focus on the features and criteria that are most important to your business. In addition, evaluate the company as well as the product – criteria such as company performance, profitability, customer satisfaction, and the breadth of training and service offerings are as important as the product itself when it comes to ensuring the long-term life of your investment. Analyst firms are often good sources of independent information and opinions on vendor options, so if you subscribe to these services be sure leverage them during your analysis. Now is also the time to talk directly to a vendor's customers and hear firsthand what to expect during the project life-cycle. Customer references will validate the stability of the product and the supportiveness of the vendor and its employees.

Finally, do not be afraid to push vendors into a proof-of-concept exercise early on in your evaluation process. This will help you expedite a decision, give you more confidence in the selected vendor's ability to meet your specific needs, and give you a feel for the caliber of the services and support you will receive long-term. After all – delaying a decision or choosing an inadequate solution will not only hinder your ability to see immediate results but also allow your competition to get that much further ahead.

Summary

Engaging in effective business process management practices within your organization is no longer an option but an operational necessity. The question then is whether or not implementing a BPM Suite is also a necessity – or can you make do without it? Given that thousands of organizations around the world, across dozens of industries, are implementing BPM technology and becoming more efficient, increasing control, and gaining the visibility to be more agile, it seems the answer is that you can either move forward with choosing and implementing a BPM Suite or risk being left behind. So get out there and start the process – just be sure to follow these 5 easy steps to help you navigate the playing field, focus the selection process, and increase your odds of choosing the right BPM Suite for your organization.

This white paper is provided courtesy of Metastorm, Inc. As the first breakaway BPM vendor, Metastorm is a leader in business process management (BPM) software and best practice methodologies for modeling, automating, integrating, and improving both human and system-based processes. Metastorm BPM™ is a complete solution for roundtrip process improvement, designed specifically to address complex processes that are unique to organizations. Metastorm's 1200+ global client base in manufacturing, retail, financial services, business services, healthcare and government are achieving rapid ROI and Enterprise Process Advantage® in customer service, supply chain operations, risk management, and internal operations. More information is available at www.metastorm.com.



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