

# Metastorm BPM – Bringing Business Value to SOAs

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Technology only proves its worth in business if it helps an organization realize the successful achievement of its strategic objectives. The justification of technology as a key business driver is drawing renewed attention as executives consider the potential for Service Oriented Architecture (SOA) in their organizations.

While an SOA can go far in addressing the important security, reliability, and re-usability of services, SOA is nonetheless a technical approach. Thus, the challenge of SOA—and the key to achieving business value—is elevating service enablement beyond just technology functions. The reality is that a SOA has limited value unless it encompasses disparate applications and platforms, and most importantly, it moves beyond technology and is orchestrated and controlled in the context of business processes.

SOA technology and methods provide a foundation for service enablement in an orderly fashion and allow an organization to avoid the pitfalls of deploying an uncontrolled maze of services. But from the outset, organizations face the challenge of where to start: what services are going to add immediate value, and how are they going to be used by the most important business functions? Identifying the services that are consumed by the most critical business processes in an organization can be a daunting proposition.

Because of its focus on achieving critical business objectives, Business Process Management (BPM) is able to address these and other SOA challenges, and is rapidly gaining a reputation as one of the most valuable IT investments today.

The leader in enterprise BPM, Metastorm, applies a unique Stage Action Role (SAR) methodology to identify key services. This clear method creates a roadmap to use in developing an SOA. With an SOA in place, Metastorm BPM™ provides a service choreography—leveraging the SOA to orchestrate processes while maintaining the visibility, agility, and control that a strong BPM platform provides.

The Metastorm BPM platform plays many roles in the SOA. While it guides service enablement and is an active consumer of services, Metastorm BPM also allows actions within automated business processes to be exposed via the SOA. With BPM orchestration, this exposure of key business events and information to users at the appropriate times and in the appropriate contexts adds tremendous business value that might not otherwise be achieved with an SOA.

By focusing on the activities, events, information, and services that are required to execute the business, the combination of BPM and SOA provide an important platform for business/IT alignment. The event-based nature of Metastorm BPM, enabled with services provided by the SOA, opens the door for the foundation of an Event Driven Architecture (EDA) where processes and services are viewed, analyzed, and modeled in relation to actual business events.

## **The Power of BPM in an SOA Environment**

Successful execution of such business essentials as product delivery, service excellence,

operational efficiency, corporate governance, profitability, and market leadership all depend on business processes. Yet, in many cases, the large degree of flexibility and human decision-making required for these processes have made them difficult to automate and control – forcing the most critical processes in the organization to remain inflexible, slow and susceptible to error and risk. Metastorm BPM is uniquely structured to support the design, integration and deployment of complex, human-centric business processes without requiring new technology, systems, or skills.

Thus, organizations that position Metastorm BPM at the core of their SOA strategies realize more business value from service enablement as BPM helps optimize the use of the SOA across the core business processes that most directly impact executives' top performance objectives:

- Increased productivity
- Enhanced customer service
- Greater competitive advantage
- Stronger financial performance

Metastorm offers a BPM software suite designed to quickly aggregate services from systems throughout the organization into cohesive, people-based business processes. Simply put, Metastorm BPM is the glue that ties together services and makes them available to business users within the context of meaningful business processes.

Metastorm removes the complexity of managing access to multiple types of services—including technical, business function, and business data services—by applying these services at the appropriate points in a process. In addition, Metastorm BPM provides visibility and access to the complete “roundtrip” process life-cycle, giving organizations the ability to apply SOA concepts in process design, integration, execution, analysis, and ultimately the improvement of these strategic processes.

## Organizing Complex Business Function Requirements

While an organization may have many processes that do truly stand alone, most mission-critical business processes have complex data and business function integration requirements. Traditional integration architectures take several forms, among them: custom integration code that is replicated across different integration customers (customers = applications), enterprise application integration platforms, and message brokers. All of these approaches are quite complex and exist at a level far beneath the actual processes and applications that require the data or the business functions offered by the integration.

Metastorm BPM organizes the services offered in an SOA in the following manner:

**Business Function Services** are generally coarse-grained services that represent a transaction/activity with significance to the business (for example: creating a customer record, creating an invoice, or closing an open customer service ticket). Business function services are usually

related to a transaction and require the planning and control appropriate to the transaction, such as locking, concurrency, etc. These types of services are differentiated because of their unique requirements.

**Business Data Services** provide access to the information contained in the various applications, systems, and repositories of the organization in an open but secure fashion, and they eliminate replication of point-to-point integration between systems and processes. For example, business data services would provide a sales order entry process with data about active customers, available product sets, and current inventory status. In a well-planned SOA, SQL, host data sources, transactions, and batch file data sources may be served up by business data services. Business data services often deal with large, complex data sets and are often associated with interactive usage when used in a human process context. For example, browsing a large list of customers might dictate data services that accommodate paging, sorting, and filtering capabilities or the ability to combine asynchronous data manipulation operations.

**Technology Services** make available fine-grained supporting functions, offered as part of the platform, such as a function to create a customer-specific folder in a content management tool. Other technology services would include single sign on, shared authorization services, and transaction time-stamping.

Metastorm BPM uses standards-based technologies to orchestrate the consumption of specific business functions, business data, and technical service functions within and across multiple business processes. BPM also provides the ability to leverage these services throughout the complete lifecycle of each process, whether the service is invoked as part of a system action or interactively from a user form. Complementing this is Metastorm's support of a wide array of SOA-enabling technologies to make process components—including actions, stages, and user interfaces—available as services, delivered to consumers via the SOA, whether those consumers are people, applications, or systems.

## Closing Critical Process Gaps

BPM plays a leading role as the process service provider in a firm's SOA, but beyond the technical aspects of this role, BPM also eliminates the gaps that exist in organizations—gaps between people, between organizational units, and between business applications.

What differentiates BPM from traditional workflow is the inclusion of all aspects of the process, as opposed to a more narrow focus on the movement of documents and data. BPM technology has focused the attention of executives on the business processes that make their organization unique and competitive. As a result, business processes are increasingly viewed as independent and unifying assets of the organization.

Metastorm BPM software is specifically designed to close the gaps across applications and people and create a virtual “process layer” across the enterprise. This layer supports critical

processes both within the organization as well as external to the organization, with suppliers and customers.

The visibility that this process layer delivers affords greater insight into the business and eases the challenge of identifying value-add services during the modeling and analysis phase of building an SOA. That visibility also plays an important role in the execution of services once the SOA is deployed.

## **Ideal Framework for SOA**

In the analysis and modeling phase of process deployment, it is vital not only to understand the steps and activities that make up a process but also to identify the various business services and content required by each process. Metastorm's Stage Action Role methodology, designed to align with the BPM software that will interact with services, clearly identifies how this information will be used in the process, even capturing the organizational roles of the people using the information.

The human role in the process is to make decisions using the information identified, and these decisions result in execution of a business function. Metastorm's Stage Action Role methodology allows for the clear capture of key business functions that need to be executed in the process. In this way, Metastorm BPM provides the ideal framework for identifying which systems must be enabled as services in an SOA to deliver value directly to the business.

When multiple processes are subjected to this analysis there is additional benefit. SOAs and services are no longer viewed in the context of a single process but across multiple processes, spanning a wide range of business functions and organizational units. The result is the identification of cross-cutting concerns in an SOA, highlighting the systems and services required to add value across the entire organization. This view opens new doors for value-based analysis and planning business-wide.

Starting with a solid approach to planning and modeling an SOA, as outlined above, is critical to easing the challenges associated with deployment.

## **Provisioning a Wide Variety of Process Services**

From a technical perspective, Metastorm BPM has been designed based on three simple but significant constructs: messages, services, and events. These three building blocks are present at every level of the Metastorm BPM architecture—from the inner workings of the process management engine and web server to Metastorm's unique ability to provide instant access to a firm's unique business processes.

This architecture makes Metastorm BPM an ideal platform to provision a variety of process services in an organization's SOA. These services can represent high-level business activities such as opening a new customer account, or more specific supporting functions such as adding comments during the review of a customer's annual report. In addition, Metastorm can provision these services using a variety of technologies, including web services, .NET assemblies, Java objects, XML messages, WebSphere MQ messages, mainframe functions, and even command-line protocols.

As part of designing and deploying an SOA, organizations using Metastorm BPM quickly view processes as first-class services to be delivered as part of the services infrastructure. No longer are business processes locked inside a single packaged application or even an organization's bespoke solution. Processes are captured, understood, and deployed in a way that enables easy interaction with other systems and processes, allowing for coordination across an entire canvas of available business services.

## The Future

Today's approach to Service Oriented Architectures is a technology evolution which will enable future technologies, architectures, and approaches to emerge. Once SOAs are achieved, the next step is to go beyond technology alone and continue the evolution—by aligning technology with business value.

With a foundation of SOA and BPM in place, advanced features of BPM—such as simulation and historical analysis—can be applied not only to the human components of complex processes but to the performance of system-based business functions that participate in the process. For example, both the per-use cost and latency introduced by business functions accessed via an SOA can be modeled and simulated as first-order participants in the larger BPM process. This allows for true process improvement at all levels of the process—driving greater results.

The next step in the business infrastructure evolution is to transition to an Event Driven Architecture (EDA). Evolving to an EDA enables more proactive business management by automatically triggering a service based on business drivers, and Metastorm BPM provides the foundation for making this business-critical transition. Once achieved, an EDA allows organizations to manage the business more quickly and more proactively based on a global view of key business drivers.

## Conclusion

The leader in enterprise BPM innovation, Metastorm helps organizations realize business value from SOAs and achieve Enterprise Process Advantage®—a heightened level of business performance resulting from increased efficiency, control and agility across mission-critical processes. Metastorm BPM combines the strategic advantages of business process

management with the integration technology required for SOA to effectively align IT initiatives with the strategic goals of the business user at every level within the organization.

With Metastorm BPM, executives can directly and immediately impact all of their most critical business processes—spanning a wide range of business functions and organizational units. The result is the achievement of key performance objectives with a rapid and significantly positive impact on cost, productivity, response time, visibility and profitability across the entire 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](http://www.metastorm.com).*



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