



**Back to Basics with BPM:  
Using Nimble BPM to  
Drive Business Change**

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## BACK TO BASICS WITH NIMBLE BPM

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The climate for business operations is in constant flux. Today more than ever, market conditions are having a significant impact on business operations. There is a constant need to improve the processes and workflows that power the business—not only to stay ahead of the competition, but in some cases to keep the doors open. As a result, business managers are striving to improve efficiency and streamline operations in order to positively impact the bottom line. Savvy business leaders are also finding ways to use their business agility to achieve competitive advantage. Technology is a key enabler for driving agility, streamlining work, and improving business processes.

For a while, Business Process Management (BPM) looked promising as an answer to the desire of business leaders to increase the agility and automation of critical business processes. And, done correctly, it can be. However, over the past several years BPM has morphed from simple process automation and management into a much broader, infrastructure-type commitment that is often too complex, requiring significant IT resources and long lead times. In many cases, a standard BPM initiative forces the business to re-examine its business processes, causing greater complexity and more resistance, even from business users.

Given the economy it's hard for many organizations to justify a large-scale BPM project. At the same time, while businesses themselves are working harder to find and service customers, business users are being asked to do more with less—and IT departments are coping with more projects and dwindling resources. Capital budgets are being cut as well, and every department is being affected.

What's needed is an approach that takes BPM back to the basics and helps organizations achieve what the technology originally promised: increased business agility and increased efficiency. Focusing on the core competency of BPM and process automation enables businesses to do more with less, streamlining their key business processes and reducing costs. What's needed is nimble BPM.

BP Logix is one company delivering on the back-to-basics BPM approach. BP Logix Workflow Director is a web-based BPM solution that empowers business users to model, automate and streamline business processes. While the solution scales to enterprise requirements, it's practical enough for departmental deployments. In addition, Workflow Director offers a new approach to automating common business processes that don't fit into a standard "flowchart" format. Specifically, BP Logix Workflow Director 2.1 allows organizations to manage processes in much the same way they would manage projects—by defining a task list, along with simple rules to define what needs to happen when.

This Upside Research white paper highlights the need for nimble BPM and takes a closer look at BP Logix Workflow Director as an option for streamlined workflow automation and process management.

## **A BPM PARADIGM SHIFT AT THE WRONG TIME**

There is no doubt that BPM has captivated the global business audience, perhaps more than any other technology solution in recent history. Despite its honest intentions, BPM has been caught in the maelstrom of business change, and has quickly been transformed into a universal “band-aid” for a myriad of enterprise-scale business challenges. Today’s enterprises have been pushing the original BPM solutions to the limit. What began as a way to easily automate a process—such as order-to-ship or on-boarding a new employee—has changed into never-ending strategic BPM initiatives that last for years and involve everyone from key business stakeholders and IT managers to data modelers and developers.

Well-meaning business strategists have thrown in process after process under one project. They have taken the promises of automation and improved efficiencies and applied them to all areas of the enterprise. As a result, the demands for even greater efficiency gains have grown. Now business leaders want increased automation; integration that extends across processes and departments; greater visibility into what is happening with business-critical processes at any moment (in order to be more responsive to market conditions); and the ability to easily modify their processes to reflect those changes.

At the same time all this has been happening, organizations have been struggling to reduce spending and be more strategic about technology growth. They are looking to marry BPM with enterprise architectures as a way to strategically manage all of their technology assets. The challenge then becomes how to integrate all of the separate efficiencies gained from BPM with the overall IT strategy of an enterprise-wide architecture. As a result, for many companies, the initial scope of a BPM project has crept into a massive and overwhelming IT paradigm shift. And given today’s business priorities, that’s turned into a paradigm shift at exactly the wrong time.

## **BPM PROCESS MODELING – UNNECESSARILY COMPLEX**

While traditional BPM solutions have much to offer the enterprise, they also present several important challenges that prevent businesses from getting fast results from automating their key business processes.

The early adopters of BPM solutions typically approached their implementation from a flowchart-type perspective, whereby they would take an existing business process and map it out into a flowchart format, with neat boxes and arrows. It’s a great approach when it works, and it can be very helpful for clearly defining and documenting business processes. But one of the problems with this approach is that some business processes are not well-defined enough for flowcharts. In addition, the business users that should ultimately be managing these processes don’t often think in terms of structured, static flowcharts. Instead, they describe a process with activities and dependencies and workflows that they need to be able change when the business changes.

Real-life business processes can be much more dynamic than a flowchart depicts, and they are structured in different, non-linear ways. One problem that has plagued traditional BPM

deployments (and the business analysts trying to model processes) has been the challenge of trying to fit dynamic business flows into a structured BPM modeling exercise. Further challenges arise when the business users are asked to change the way they are currently working to make the process “fit” better with the BPM solution. The results are the BPM project that was intended to automate the original process becomes expensive and takes an inordinate amount of time and resources. And, in some cases, the resulting automated process is rejected by the business users because it requires them to change the way they work.

## **BACK TO BASICS WITH BPM: FOCUSING ON NIMBLE PROCESS AUTOMATION**

While traditional BPM solutions are often the right solution for large-scale, infrastructure-oriented IT strategies, it may be time for a change—or at least a practical alternative. Given the complexities and investment required for traditional BPM solutions, many organizations are taking a step back these days to re-evaluate process automation and management alternatives.

### **A ‘QUICK START’ CHECKLIST FOR NIMBLE BPM**

Organizations interested in nimble BPM solutions might want to consider some of the following nimble BPM attributes. A nimble BPM solution should:

- Embrace the business user
- Offer a cost-effective solution
- Be deployed rapidly/out of the box
- Provide easy-to-use graphical rule definitions to control all aspects of a process
- Include sophisticated functions that do not require programming (IT) resources to implement
- Have the ability to handle ongoing modifications and rule changes (This ensures more rapid deployment as an implementation can be started quickly then continually optimized through real-time modifications.)

At its core, BPM is about the automation and management of business processes. But it is also about the business. In short, given the current objectives of many businesses, BPM needs to return to where it began—automating individual tasks or processes and providing workflow management. Then it can expand to become a technology enabler that empowers an enterprise and its IT infrastructure to dynamically respond to business needs.

To achieve this return to basics, BPM needs to be put in the hands of the business process owner. Despite what the media would have one think, BPM doesn’t have to be scary, overreaching, expensive, or time-intensive. Business users need the tools for BPM in their hands to drive the business change they want and, therefore, BPM needs to be approachable and usable immediately by the business user. Effective BPM solutions will furnish business users with the tools that will enable them to drive process automation, be approachable from different perspectives, and enable a short-term timeline that delivers fast ROI.

What's needed is a more nimble approach to BPM. What's needed is an approach that combines the vision and goals of traditional BPM with more practical (and business-focused) methods for process automation and management. What's needed is nimble BPM.

With a more nimble approach, BPM can once again become relevant in the new economic and business landscape. Process automation and management can't wait for large capital expenditures or multi-year projects. Today's economic turmoil has made it more important than ever before for BPM solutions to deliver results sooner, rather than later. It has made it more imperative for BPM solutions to be usable and manageable by business users, not just the IT staff. A nimble BPM solution is one that can deliver results and value today, even in the changed economic climate. It enables businesses to do more with less, achieving their goals with reduced headcounts and smaller budgets.

One important component of a nimble BPM approach is the realization that process improvement isn't only for the well-defined processes or for traditional, one-step-after-the-other linear processes. While many processes can indeed be defined, automated and managed in a "flowchart"-like format, other business processes may be less well defined, or less linear. These are the types of processes that can benefit from a different approach. Instead of the flowcharts and "swim lanes" found in traditional process modeling products, these less well-defined or non-linear processes might benefit from more of a "project management" or "task-oriented" approach.

*"We have been developing a lot of online solutions for our intranet relative to our business processing and workflow. We found that the ease with which we were able to deploy Workflow Director worked well for us. The plug-and-play front end, dynamic forms and troubleshooting capabilities of Workflow Director hold even greater promise for helping us more efficiently manage our business processes."*

*--Bruce Lawrence, Network Manager  
Liquid Controls, a unit of IDEX Corporation.*

Nimble BPM extends the reach of BPM in practical ways, by enabling enterprises to use the right tool for the right situation. This simplifies BPM solutions rather than making them more complex. There are many business processes that are well-suited to the existing BPM tools that enterprises have adopted. Nimble BPM, however, is an approach that enables business leaders to add value on top of existing processes and traditional workflows. Instead of throwing out the baby with the bathwater, nimble BPM provides new ways of viewing reports and workflow status and improving process-related visibility that are different from a traditional workflow perspective. It not only works for traditional "linear" processes, but also for all the other processes that don't fit into the "flowchart modeling" steps that many traditional BPM projects include.

## **COMPONENTS OF NIMBLE BPM**

There are several important components that distinguish nimble BPM from traditional BPM approaches. This section is designed to highlight those components for enterprises, IT and

business managers, business analysts, and project managers interested in learning more about nimble BPM.

### **TOOLS DESIGNED FOR THE BUSINESS USER**

Nimble BPM starts in the hands of the business user. It does not start from the bottom-up perspective of servers, coding and modeling. It also doesn't start with an IT-centric view of the world. An effective nimble BPM solution, therefore, needs to include tools that are designed specifically for the business user.

While the details can vary, the tools need to be very graphical, easy-to-use, and IT independent (no extensive training or intensive help desk use).

*"BP Logix offers an adaptable system that is user friendly and easy. I can design any workflow or path that I want. In fact, it's very adaptable to almost any business process. This business logic gives me plenty of functionality to mimic. As importantly, we have seen our approvals go from two weeks to two hours! Although we can't put a number on the amount of hours it has saved, the system is the hero."*

*--Joseph Stiefel, Database Analyst  
Friendly Ice Cream Corporation*

### **STRUCTURE BASED ON PROJECTS**

As an alternative to traditional BPM platform approaches, nimble BPM directs the focus at a project level. It is structured in small segments that can be quickly automated and lead to faster ROI. This enables the business user to focus on a pain point or business process that is particularly challenging and therefore will deliver a measurable benefit through automation.

### **PROVIDING A VALUABLE VIEW OF BUSINESS PROCESSES**

Since "the business" is at the heart of the "return-to-basics-with-BPM" goal, nimble BPM solutions must provide business views of process automation and management that capture the actual business status. The criteria for judging the status of a particular process are defined by the business users themselves, and weighted according to how the actual process impacts the business. The results are business views that are relevant and concise - and illustrate where a process stands from a business perspective.

### **BP LOGIX OVERVIEW**

BP Logix has spent the past four years delivering its vision for BPM with products that focus on providing greater agility and visibility into business processes. The company has remained true to the basic promise of BPM by providing tools to business users that automate critical processes, manage workflows and documents, and provide insight into the business-related status of a particular process.

BP Logix' flagship product, Workflow Director, is a web-based solution that provides process management, automation and reporting functionality. Workflow Director is built on a document management and workflow automation system, providing the ability to manage business rules, documents, e-forms, and workflow processes. Unlike traditional BPM platforms, BP Logix Workflow Director is designed for business users to use "out of the box,"

with tools that are easy to install, require no programming, and can be used at a departmental level and grow with the business.

BP Logix Workflow Director is a solution that harkens back to the initial vision of BPM, with the addition of a project management focus that supports the many non-linear processes that abound within the corporate ecosphere. Workflow Director embraces the tenants of nimble BPM in the following ways:

### **FAST IMPLEMENTATION FOR TACTICAL BPM**

BP Logix Workflow Director is designed to address specific pain points that an enterprise is experiencing. As a result of its design and philosophy, the product can be quickly implemented with limited IT involvement, thus speeding up the project and delivering faster results to the business. Since it is not a large infrastructure-or platform-based solution, Workflow Director can be implemented at tactical or departmental levels and begin to work (and thus validate its usefulness and ROI) immediately. Because the product contains enterprise-class components including a rules manager, document management, workflow processing, and e-forms manager, Workflow Director can scale to meet the needs of the enterprise once the initial process has been automated. In this way, companies can address their more tactical needs, achieving fast process automation and yet have the option to accommodate many other business processes across the enterprise.

### **TOOLS DESIGNED FOR BUSINESS USERS**

Understanding the need to get the right tools into the hands of the business user, BP Logix Workflow Director includes a number of easy-to-use tools that support the promise of nimble BPM. These include:

- **Workflow Automation** – Workflow Director’s workflow engine enables business analysts and business users to model their processes, automate routing, and monitor the results. It provides a 100% Web-based interface that enables business users to graphically model and build their processes and to do so without relying on programming. Workflow Automation supports both pre-defined and dynamic routing, allowing business users to define processes that fit the way they work, instead of forcing them to alter their work patterns. The graphical views of running workflows provide an easy status check for business leaders to ensure that business processes are running smoothly.
- **eForms Builder** – Perhaps the most obvious example of how Workflow Director embraces nimble BPM and gives business users the tools they need is its eForms Builder, a powerful web-based solution for creating and routing electronic forms. Users can quickly create e-forms with fields that can link to external databases, can be pre-populated, and can be dynamically controlled through the rules-based business logic. By using eForms Builder to create

electronic forms and routing of common documents within the enterprise, businesses will see a substantial increase in efficiency and measurable cost savings and results.

### **NEW PROCESS VIEW**

Workflow Director provides a variety of reporting and auditing functions that are entirely created from the business user vantage point. Because all data and metrics are stored in a relational database, business users have a high degree of flexibility in choosing how to view the results of their created reports, either in real-time or at scheduled distributions. Integration with Microsoft Excel puts the results in a universal format for business users to consume. And, most importantly, business processes are measured by how they impact the business, so that business managers can easily and quickly understand the relationship between the current process state and the business goals.

### **BPM INNOVATION: PROJECT-BASED PROCESS MANAGEMENT**

By incorporating project management and business rules management capabilities, Workflow Director enables business users to quickly create and automate the non-linear business processes that abound in business. It presents an “activity-oriented” perspective to processes that enables business users to more easily define activities that include conditions, dependencies, and timelines. This component of Workflow Director makes it easy for users to apply existing KPIs and rules-based evaluation of workflow tasks. The business focus of this component illustrates how Workflow Director is designed for the business users.

Project-based process management provides a great way to augment and expand the more traditional “flowchart”-style of defining and mapping business processes. Project-based process management approaches are especially good for situations where traditional process mapping is too complex or just doesn’t fit well. Let’s look at a few examples of where project-based process management can simplify process automation and management:

- **Provisioning equipment (or on-boarding employees)** – Provisioning new equipment or on-boarding a new employee are both good examples of the types of processes that fit well into a project-based process management approach. Both types of scenarios essentially amount to something (in these cases, a new piece of equipment or a new employee) kicking off a process that involves a series of steps or tasks. The steps and tasks may be related, they may have dependencies, and there may be workflows and business rules that need to be associated with the steps and tasks. A key common element, though, is that there may not be a traditional, linear, processing order to the steps—some may be able to occur independently of the others. These types of processes fit well into a project-based process management approach because each step (and its individual dependencies) can be defined separately

from the overall process—much like a task list a project manager might have.

- **Customer process management** – Another good example of a project-based process management scenario might be customer process management. For years, organizations have been implementing customer relationship management (or CRM) systems. CRM systems are good at managing customer service and perhaps marketing or sales interactions with customers, but they don't necessarily focus on managing the business processes associated with managing the customers themselves. That's where customer process management (or CPM) comes in. Customer process management is the process of managing an organization's customer accounts—what happens when a new customer is signed up, or when a customer leaves. For example, when a company brings on a new customer, it may typically have a series of steps that need to be completed—such as initiating a credit check, setting up shipping accounts, and other tasks.
- **Activity-based processes** – There are also a large number of other activity-based processes that don't fall into the traditional process definition models. These may be ad-hoc or loosely defined processes, or simply processes that are mostly defined by a series of activities or tasks that need to be accomplished, most of which can't be easily defined in a traditional flow chart. For example, an organization might have a sales order process that involves a checklist of different tasks, including background checks, documentation creation, legal reviews, and more, that would all fit well into a project-based process management approach.

As the above sections highlight, BP Logix Workflow Director puts the power of BPM in the hands of the business users that need to find easy ways to add automation to their processes. It benefits the business analysts that see the world in a dynamic, project-driven view and applies particularly well to the current economic climate because of its fast roll-out and minimal IT resource requirements. The capabilities of Workflow Director 2.1 expand the vision of project-based process automation and provide an approachable way for business analysts to implement sophisticated processes.

## **A BP LOGIX CASE STUDY – NIMH**

The National Institute of Mental Health (NIMH) is the largest scientific organization in the world dedicated to research focused on mental health. Located near Washington, DC, the NIMH works closely with the National Institute of Health and the U.S. government to fulfill its public health mission to transform the understanding and treatment of mental illnesses.

The IT department at NIMH, headed by CIO John S. Harris, includes a staff of 30 who support 1300 users across the Institute. One of IT's responsibilities was to automate the Institute's workflow processes, including the forms and documents associated with them, to improve the efficiency of the research organization. The IT department needed to find a

solution that could automate, streamline, and accelerate NIMH processes and work with the existing systems at the Institute.

A key requirement was finding software that would allow the organization to handle a huge number of forms and processes across a wide range of users, without turning into an administrative nightmare. The institute's existing manual processes incorporated critical forms that traversed the organization—from Operations to Finance and Procurement. Many forms required multiple approvals from different stakeholders.

After a five-month review process, NIMH selected BP Logix Workflow Director. The selection was based primarily on an analysis of three key criteria: functionality, simplicity, and price.

"We were looking for a product that could handle our complex database lookups, conditional workflow branching and the dynamic nature of some of the workflows we have to produce. We also needed to find one with an interface to other systems that would be acceptable," Harris said. "I looked at BPM product suites and recognized that some of these product suites offered workflow and forms as a component of a larger suite. That was not what we wanted. Instead we wanted a product developed to address business requirements like ours – one that offered an intuitive interface, was not overly complex and was competitively priced."

A few short months after implementing Workflow Director, the IT team was able to deploy an initial set of workflows. Among the processes that were activated were travel requests, remote access forms, a waiver process for security exceptions, budgetary funding requests, and IT purchase requests to expedite purchases.

The impact these optimized workflows had on the organization was significant. The NIMH team was also impressed with the capabilities of Workflow Director, and pleased with the level of knowledge and responsiveness of the BP Logix technical staff.

"The scalability and customization capabilities of Workflow Director make the product highly usable for non-technical users as well. And the time to completion for various workflows and forms, which had previously taken days and weeks now takes hours and days," concluded Harris.

## **IN SUMMARY – BENEFITS WITHOUT BARRIERS**

In the face of the current economic climate, BPM projects need to return back to basics to successfully meet the needs of today's dynamic enterprise. They need to quickly deliver the benefits that organizations need or require, without the barriers of cost, time, complexity and staffing that have built up around BPM over the years.

Building on the foundation of using BPM for process automation and now applying nimble BPM and project management-oriented capabilities, enterprises can drive business change in practical ways. A nimble BPM approach can do this more easily than traditional BPM

platforms, providing fast process automation and results that are embraced by business users, thereby ensuring success and ROI.

BP Logix is one company that understands the new landscape of nimble BPM and the critical departure from more traditional BPM infrastructure approaches. BP Logix's Workflow Director is an example of the tools that define nimble BPM; it puts these critical process automation tools into the hands of the business users, where they need to be. BP Logix takes BPM back to the basics and helps organizations achieve what the technology originally promised: increased business agility and increased efficiency. Focusing on the core competency of BPM and process automation enables businesses to do more with less, streamlining their key business processes and reducing costs.

BP Logix's nimble BPM solution, Workflow Director, offers a practical "out-of-the-box" solution that can be deployed rapidly. Organizations that have dynamic processes to automate that do not fit easily into flowcharts will especially benefit from the BP Logix approach to nimble BPM. Pre-defined integration capabilities make it easy to integrate with existing applications and data sources and support both departmental and enterprise deployments. In addition, Workflow Director enables organizations to graphically model and build processes—without requiring development or IT resources.

In addition, release 2.1 of BP Logix's Workflow Director (GA expected Q3, 2009) takes nimble BPM to the next level, with the full project management BPM capabilities outlined above. BP Logix Workflow Director 2.1 will make it even more practical for organizations to manage a wider range of both traditional and non-linear processes.

Today's enterprises have been pushing the original BPM solutions for new functionality—and for rapid deployment and faster ROI. With solutions like BP Logix, the functionality they need is now available in a form that can be deployed quickly and cost effectively.

### **GETTING STARTED – NEXT STEPS FROM BP LOGIX**

*To learn more about BP Logix nimble BPM technology, email [marketing@bplogix.com](mailto:marketing@bplogix.com) or visit [www.bplogix.com](http://www.bplogix.com) for additional white papers and resources.*

### **About Upside Research, Inc.**

*Upside Research is a research and consulting firm focused on helping clients put application development, Web services, business process management, integration, and enterprise infrastructure challenges in perspective. Upside Research helps organizations find practical ways to achieve their IT goals and profit from the diversity of a changing technology landscape.*

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