

The BPM Billboard

Planning and Scoping BPM Initiatives on Enterprise Level



Prof. Dr. Jan vom Brocke



The article



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Background



Prof. Dr. Jan vom Brocke

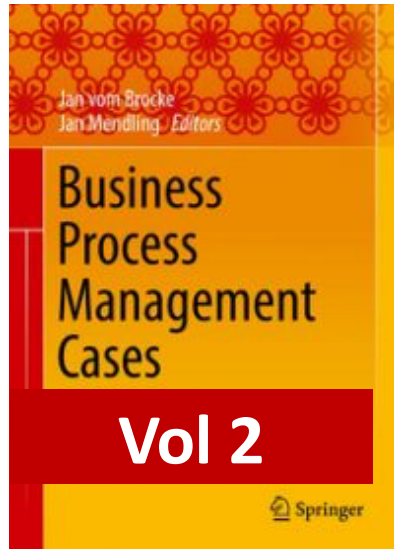


Prof. Dr. Jan Mendling



Prof. Dr. Michael Rosemann

53 Real-World Cases



vom Brocke, J., Mendling, J., Rosemann, M. (2021), **Planning and Scoping Business Process Management Projects and Programs with the BPM Billboard**, in: BPM Cases, Volume 2, Springer 2021.

Why a BPM Billboard?

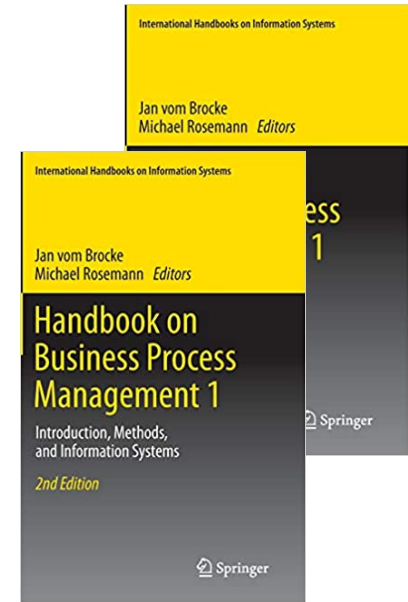
What is the BPM Billboard?

One deep dive into the BPM Billboard

Using the BPM Billboard

Summary & Outlook

My personal story towards the BPM Billboard



The **BPM_On_One_Page** idea ;-)

High-level representation of what needs to be considered in a successful BPM initiative.



Easy to use!

Why a BPM Billboard?

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Summary & Outlook

Activities

- Task**: A Task is a unit of work, the job to be performed. When marked with a it indicates a Sub-Process, an activity that can be refined.
- Transaction**: A Transaction is a set of activities that logically belong together; it might follow a specified transaction protocol.
- Event Sub-Process**: An Event Sub-Process is placed into a Process or Sub-Process. It is activated when its start event gets triggered and can interrupt the higher level process context or run in parallel (non-interrupting) depending on the start event.
- Call Activity**: A Call Activity is a wrapper for a globally defined Task or Process reused in the current Process. A call to a Process is marked with a symbol.

- Activity Markers**
Markers indicate execution behavior of activities:
- Sub-Process Marker
 - Loop Marker
 - Parallel MI Marker
 - Sequential MI Marker
 - Ad Hoc Marker
 - Compensation Marker
- Task Types**
Types specify the nature of the action to be performed:
- Send Task
 - Receive Task
 - User Task
 - Manual Task
 - Business Rule Task
 - Service Task
 - Script Task

- Sequence Flow**: defines the execution order of activities.
- Default Flow**: is the default branch to be chosen if all other conditions evaluate to false.
- Conditional Flow**: has a condition that defines whether or not the flow is used.

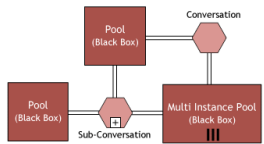
Gateways

- Exclusive Gateway**: When splitting, it routes the sequence flow to exactly one of the outgoing branches. When merging, it awaits one incoming branch to complete before triggering the outgoing flow.
- Event-based Gateway**: Is always followed by catching events or receive tasks. Sequence flow is routed to the subsequent event/task which happens first.
- Parallel Gateway**: When used to split the sequence flow, all outgoing branches are activated simultaneously. When merging parallel branches it waits for all incoming branches to complete before triggering the outgoing flow.
- Inclusive Gateway**: When splitting, one or more branches are activated. All active incoming branches must complete before merging.
- Exclusive Event-based Gateway (Instantiate)**: Each occurrence of a subsequent event starts a new process instance.
- Complex Gateway**: Complex merging and branching behavior that is not captured by other gateways.
- Parallel Event-based Gateway (Instantiate)**: The occurrence of all subsequent events starts a new process instance.

Conversations

- A **Conversation** defines a set of logically related message exchanges. When marked with a it indicates a Sub-Conversation, a compound conversation element.
- A **Call Conversation** is a wrapper for a globally defined Conversation or Sub-Conversation. A call to a Sub-conversation is marked with a symbol.
- A **Conversation Link** connects Conversations and Participants.

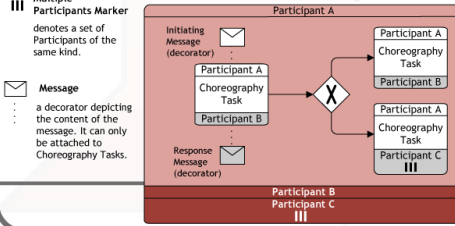
Conversation Diagram



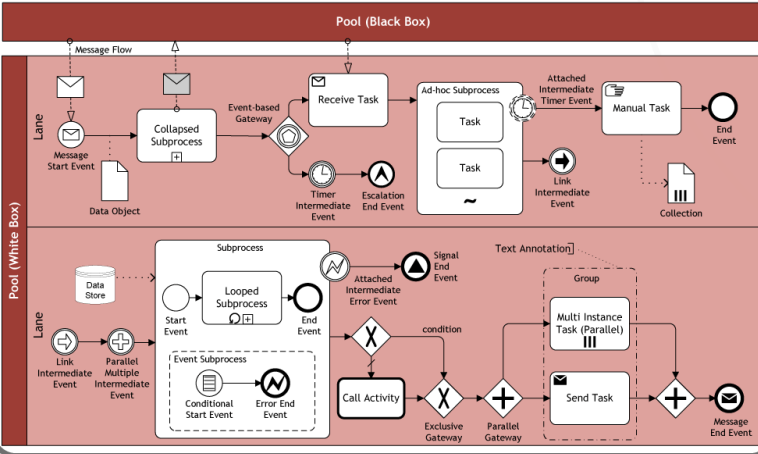
Choreographies

- Participant A Choreography Task**: A Choreography Task represents an Interaction (Message Exchange) between two Participants.
- Sub-Choreography**: A Sub-Choreography contains a refined choreography with several Interactions.
- Call Choreography**: A Call Choreography is a wrapper for a globally defined Choreography Task or Sub-Choreography. A call to a Sub-Choreography is marked with a symbol.

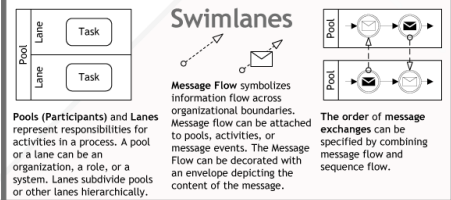
Choreography Diagram



Collaboration Diagram



Swimlanes



Events

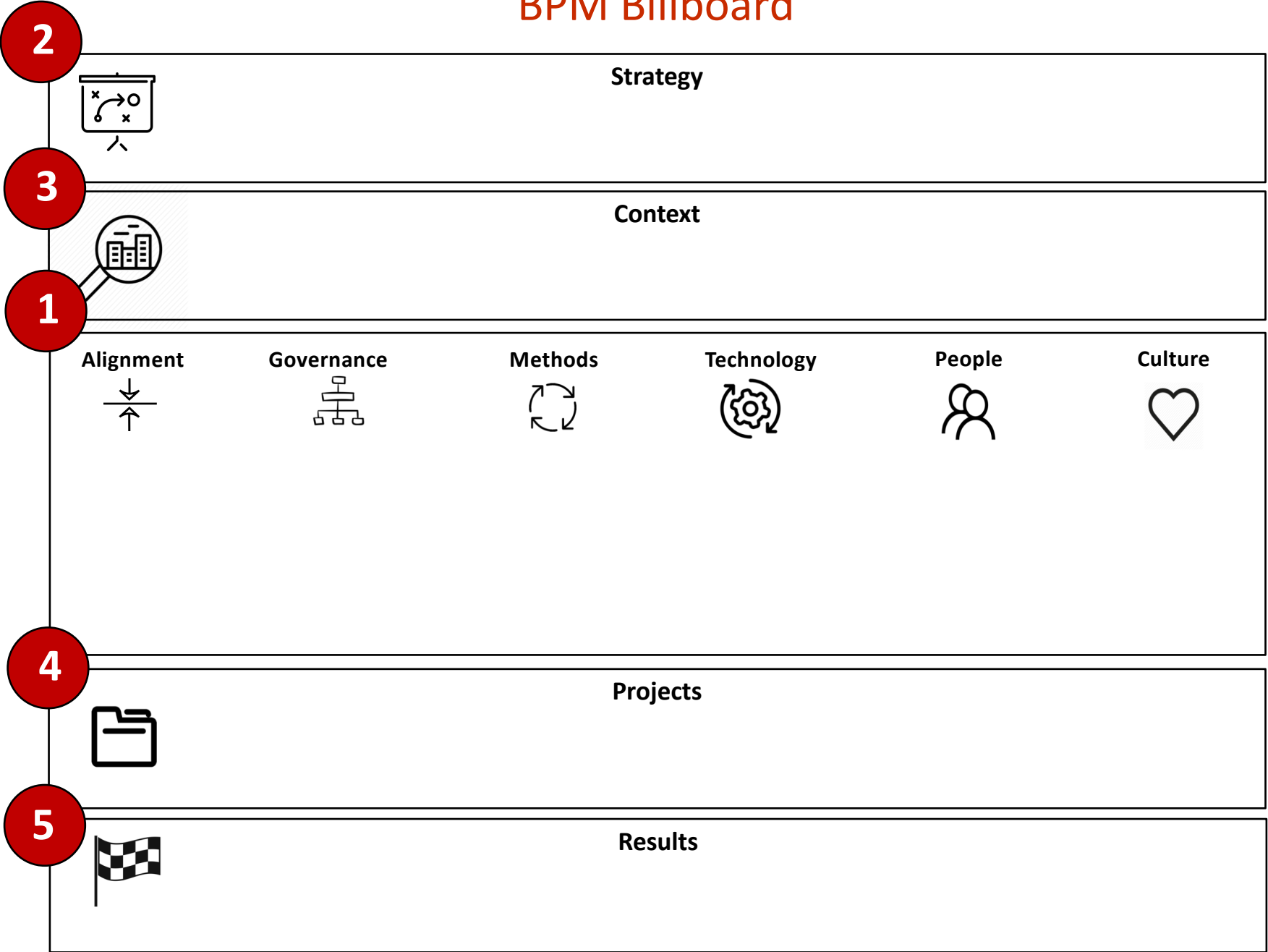
	Start	Intermediate	End
None: Untyped events, indicate start point, state changes or final states.			
Message: Receiving and sending messages.			
Timer: Cyclic timer events, points in time, time spans or timeouts.			
Escalation: Escalating to an higher level of responsibility.			
Conditional: Reacting to changed business conditions or integrating business rules.			
Link: Off-page connectors. Two corresponding link events equal a sequence flow.			
Error: Catching or throwing named errors.			
Cancel: Reacting to cancelled transactions or triggering cancellation.			
Compensation: Handling or triggering compensation.			
Signal: Signalling across different processes. A signal thrown can be caught multiple times.			
Multiple: Catching one out of a set of events. Throwing all events defined.			
Parallel Multiple: Catching all out of a set of parallel events.			
Terminate: Triggering the immediate termination of a process.			

Data

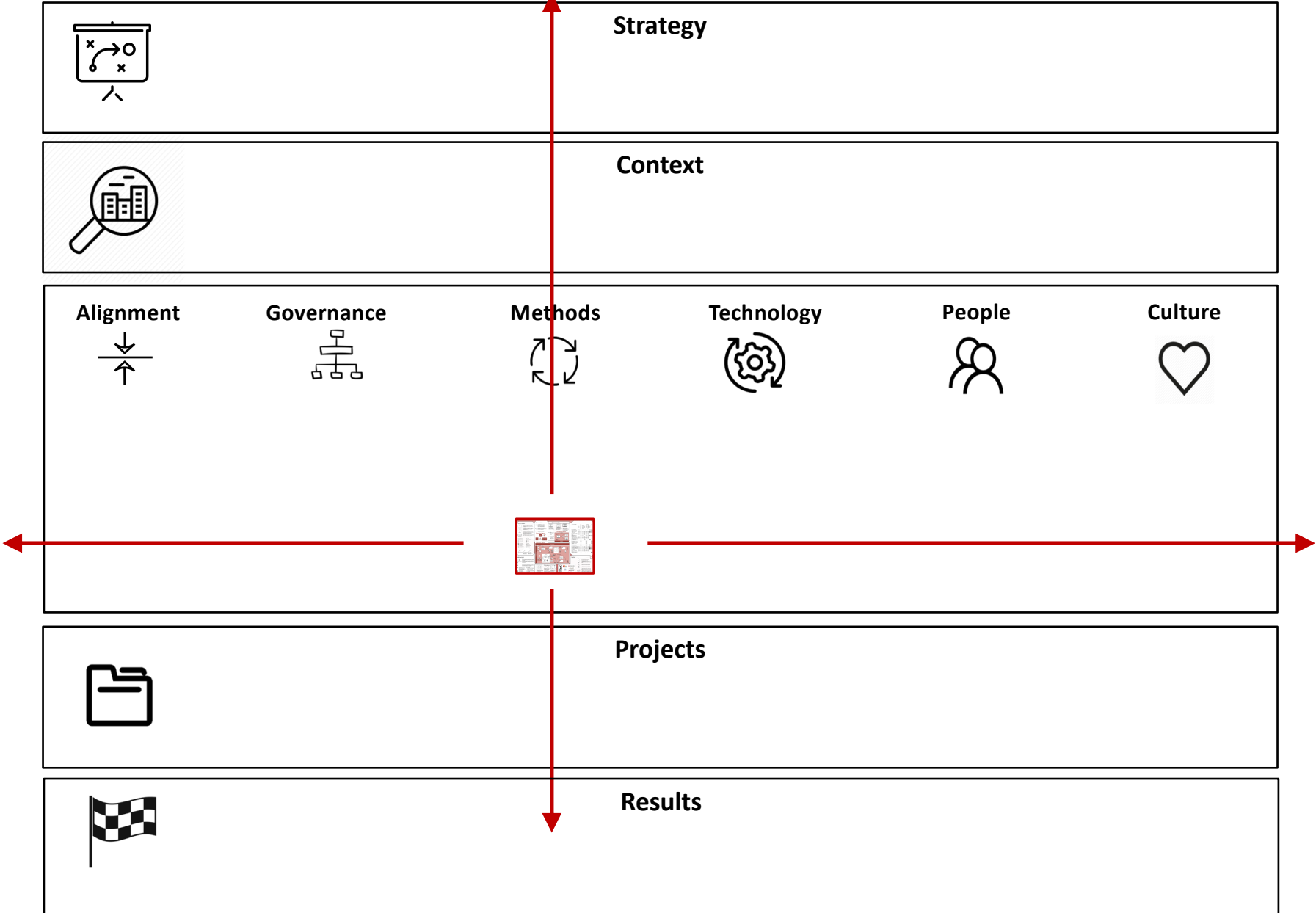
- Data Object**: represents information flowing through the process, such as business documents, e-mails, or letters.
- Collection Data Object**: represents a collection of information, e.g., a list of order items.
- Data Input**: is an external input for the entire process. A kind of input parameter.
- Data Output**: is data result of the entire process. A kind of output parameter.
- Data Association**: is used to associate data elements to Activities, Processes and Global Tasks.
- Data Store**: is a place where the process can read or write data, e.g., a database or a filing cabinet. It persists beyond the lifetime of the process instance.



BPM Billboard

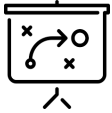


BPM Billboard



BPM Billboard

1



Strategy

Relate to strategically relevant matter.

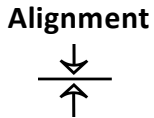
2



Context

Consider the relevant organizational context.

3



Alignment

Governance



Methods



Technology



People



Culture



Aim at developing capabilities inside the organization.

4



Projects

Derive specific and actionable projects.

5



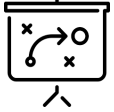
Results

Plan and measure tangible reesults.

BPM Billboard – SAP Case



Strategy









- produce innovative solutions faster and more simply
- Increase productivity of processes to support innovation
- Move away from complex and static project methods toward agile and simple processes

Context




- forty-four-year history of innovation and growth as a true industry leader
- SAP's innovations enable more than 300,000 customers in 190 countries to work together more efficiently and use business insights more effectively

Alignment	Governance	Methods	Technology	People	Culture
					
Measure the effect of process change (e.g. throughput time, customer satisfaction)	Organize for <u>digital transformation</u> ; set a symbol and provide support	Further develop a <u>joint process language</u> and methodology	Considered appropriate	Introduce activities to strengthen the <u>BPM community</u>	Establish a process infrastructure and a <u>process improvement culture</u> .

Projects					
Performance measurement system	<u>Productivity Consulting Group</u>	<u>SAP Process Map</u> and <u>SAP Maturity Model</u>	No specific projects taken at this time	<u>extensive training</u> both on- and off-line	<u>Process Excellence Newsletter, Summit & Award.</u>

Results



- typical result of 20:1 payback and a customer satisfaction that exceeds 75%
- BPM as a well-established and appreciated practice throughout the company

Why a BPM Billboard?

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One deep dive into the BPM Billboard

Using the BPM Billboard

Summary & Outlook



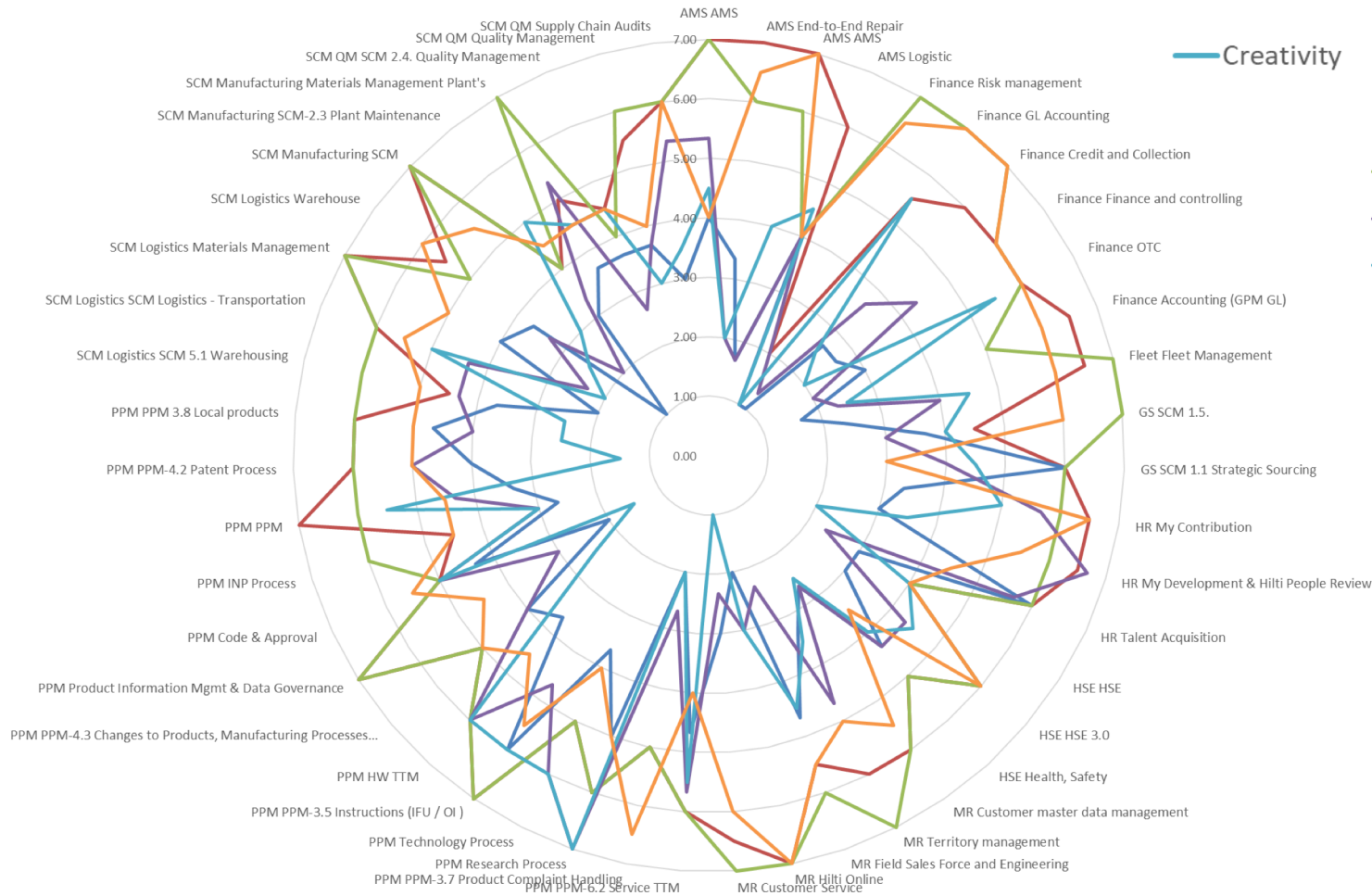
The BPM Context Framework

Contextual factors	Example characteristics		
Goal-dimension:			
Focus	Exploitation (Improvement, Compliance)	Exploration (Innovation)	
Process-dimension:			
Value contribution	Core process	Management process	Support process
Repetitiveness	Repetitive		Non-repetitive
Knowledge-intensity	Low knowledge-intensity	Medium knowledge-intensity	High knowledge-intensity
Creativity	Low creativity	Medium creativity	High creativity
Interdependence	Low interdependence	Medium interdependence	High interdependence
Variability	Low variability	Medium variability	High variability
Organization-dimension:			
Scope	Intra-organizational process		Inter-organizational process
Industry	Product industry	Service industry	Product & Service industry
Size	Start-up	Small and medium enterprise	Large organization
Culture	Culture highly supportive of BPM	Culture medium supportive of BPM	Culture non-supportive of BPM
Resources	Low organizational resources	Medium organizational resources	High organizational resources
Environment-dimension:			
Competitiveness	Low competitive environment	Medium competitive environment	High competitive environment
Uncertainty	Low environmental uncertainty	Medium environmental uncertainty	High environmental uncertainty

vom Brocke, J. v., Schmiedel, T., & Zelt, S. (2015). Considering the Context in Business Process Management: The BPM Context Framework: www.bptrends.com

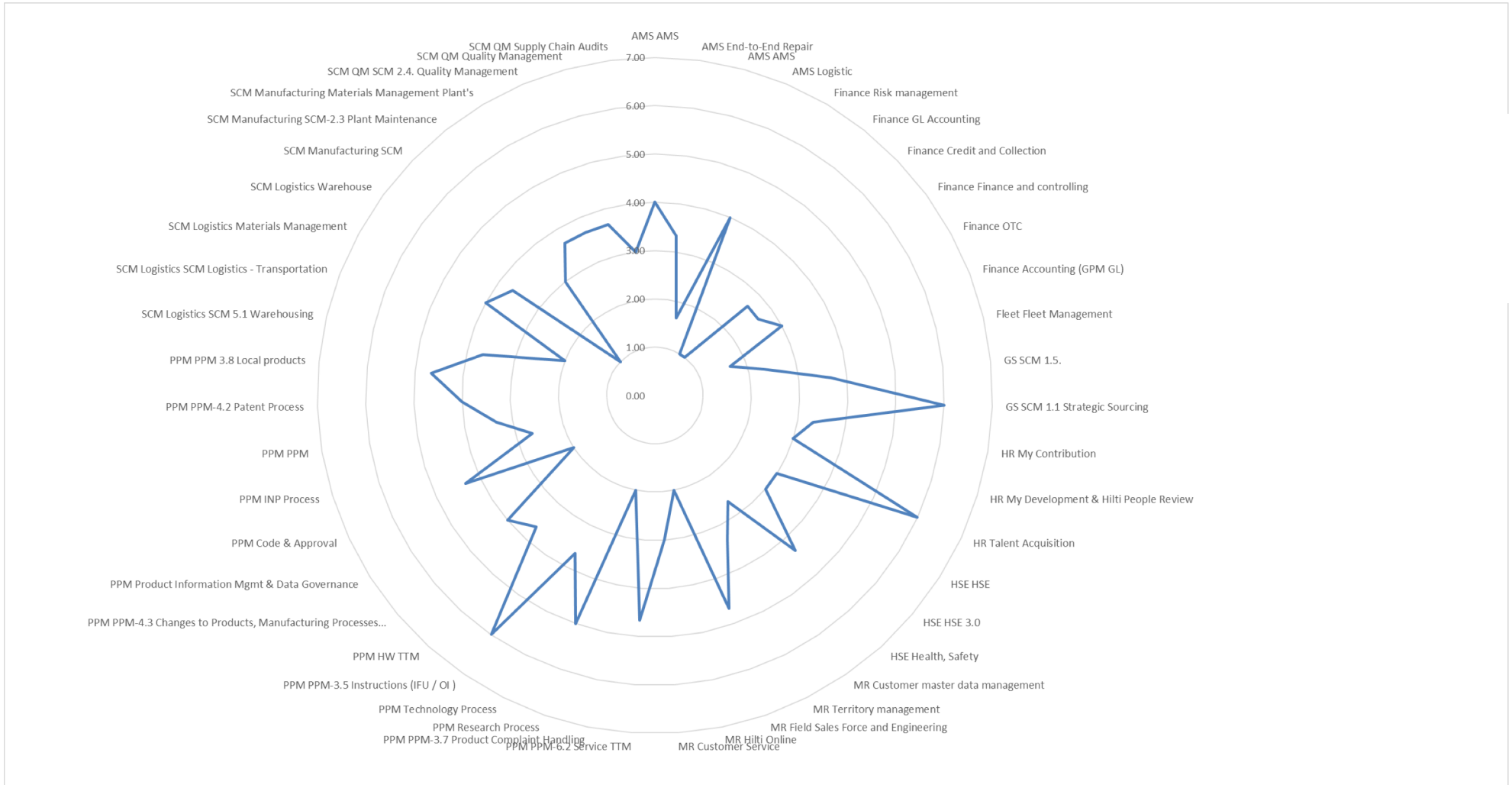
Overview – Concepts on Process Level

- Process Interdependence-Human interaction
- Process Variability
- Process Interdependence-Process Steps
- Process KnowledgeIntensity
- Creativity

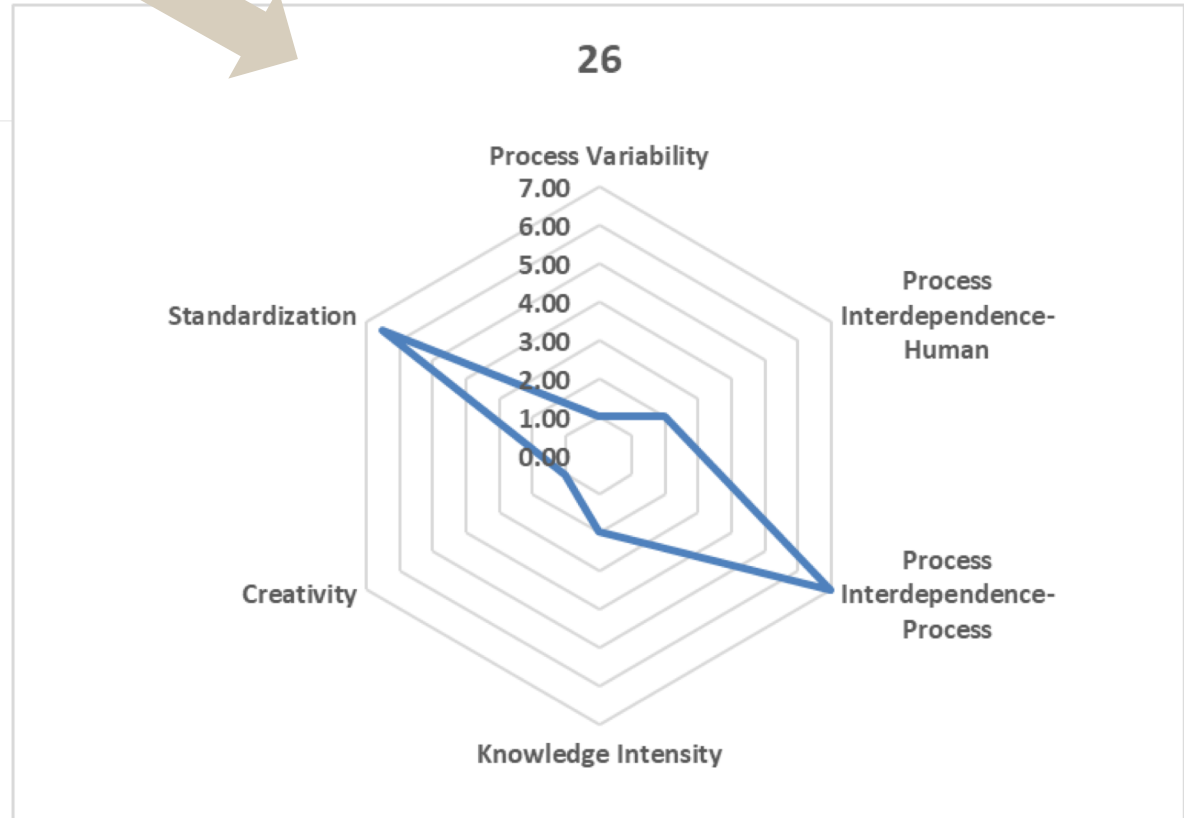
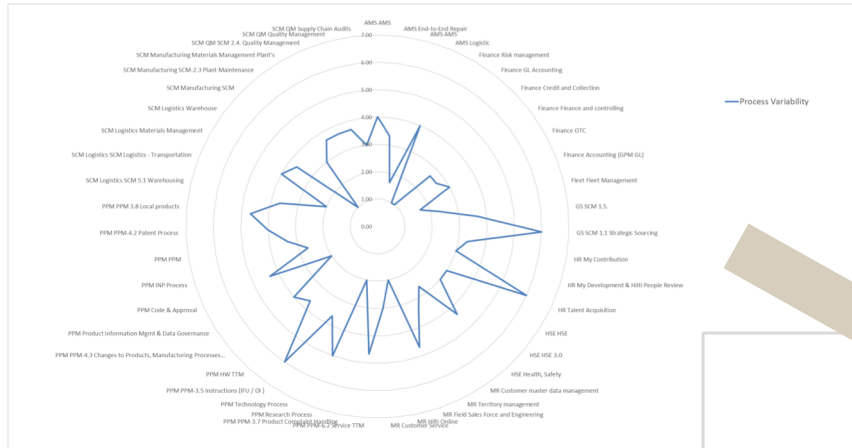


Variability – Across all Processes

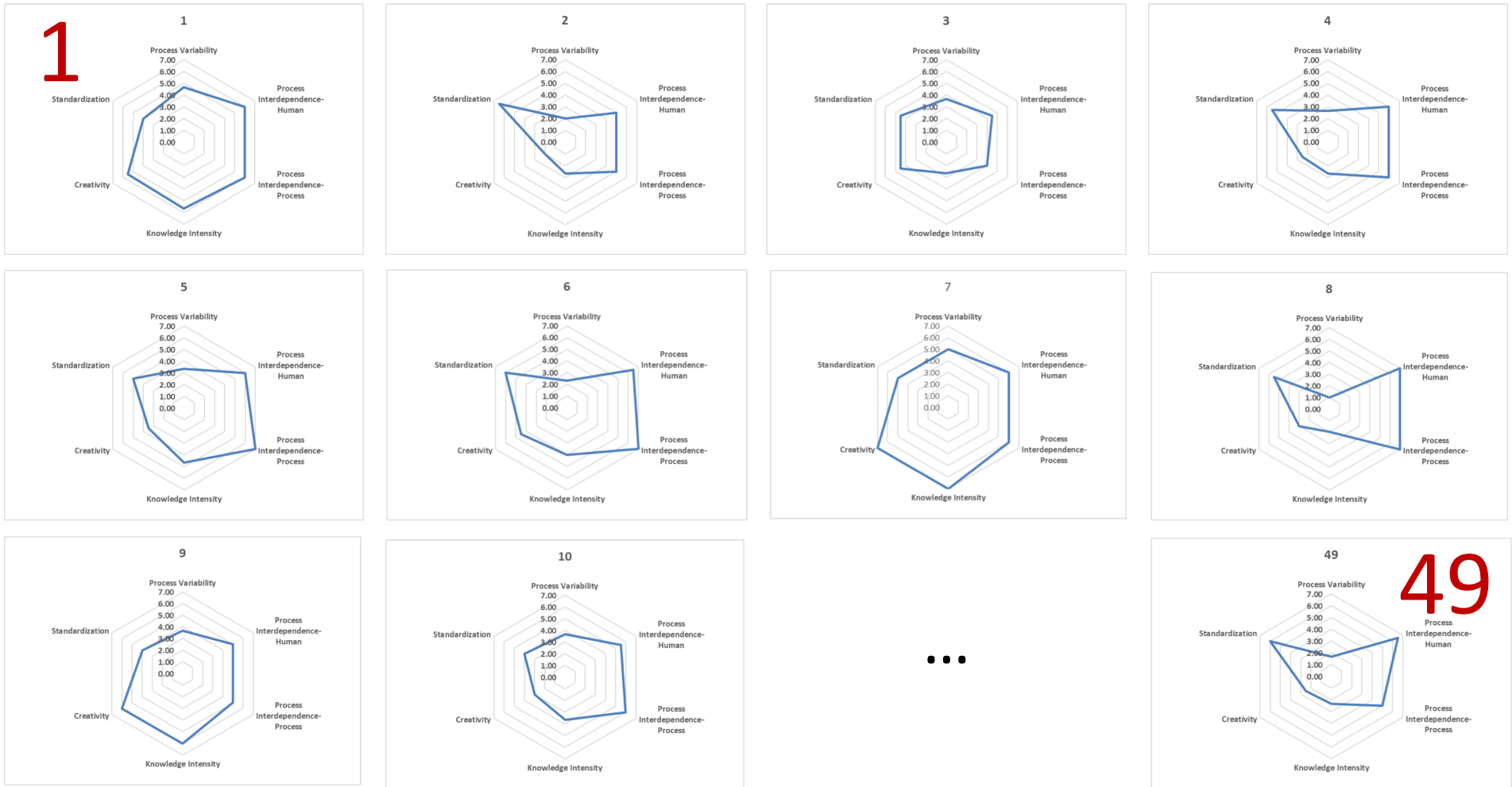
— Process Variability



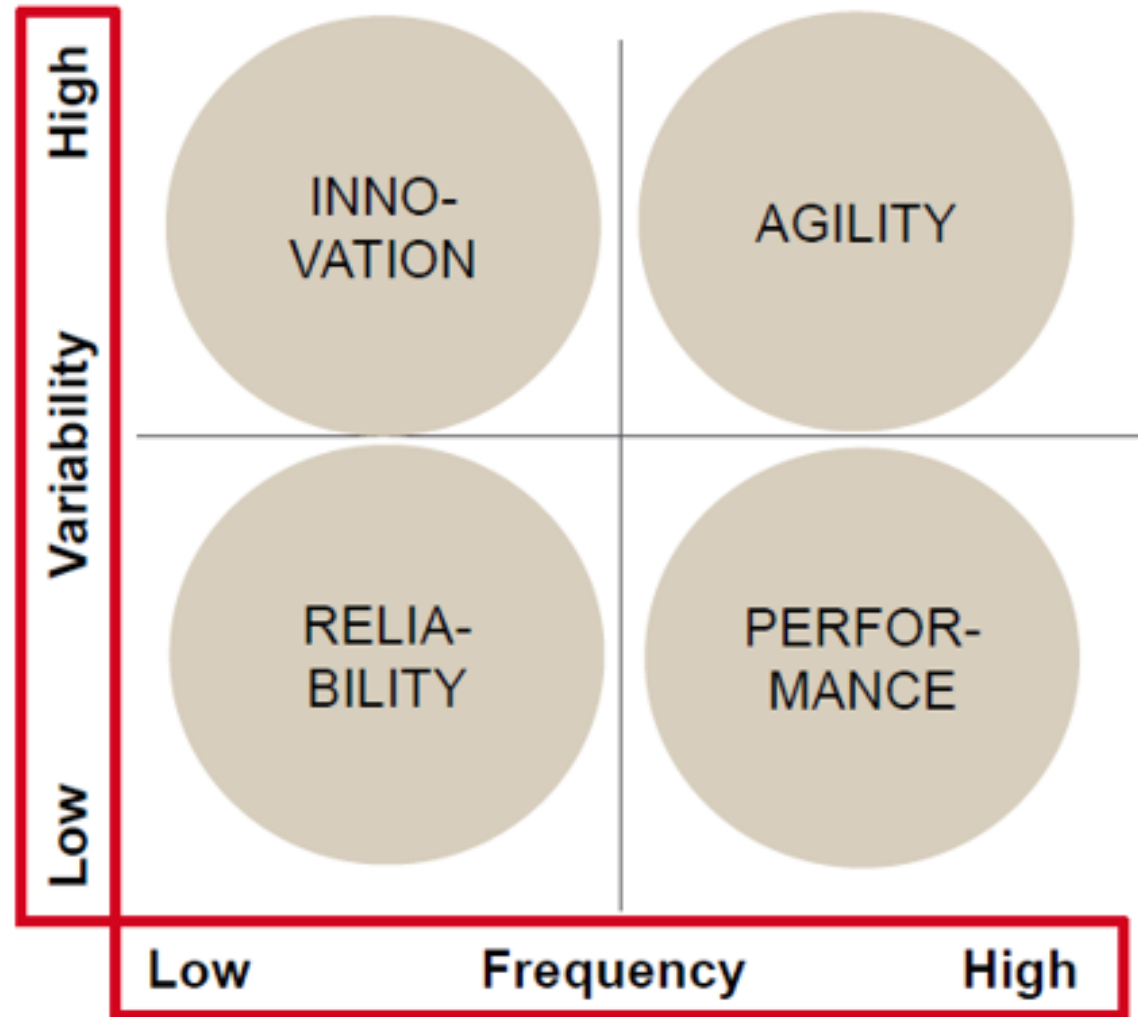
Towards Process Patterns



Process “Card Sorting” with GPOs



Result: 4 BPM Context Clusters



x Process cluster

Innovation

Strategic Alignment	<ul style="list-style-type: none"> - Uniqueness of the (new) solution - Energizing charisma of manager (to gain followers) - Result + influence oriented
Governance	<ul style="list-style-type: none"> - Collaboration spaces / opportunities to connect - Show and discuss results - Meet-ups, town hall meetings, "fuck-up meetings"
Methods	<ul style="list-style-type: none"> - Stage-gate-approach - Check box/cook book approach stating content/hints to be taken into account
IT	<ul style="list-style-type: none"> - Knowledge management systems - Networking + collaboration -> teams - Project management
People	<ul style="list-style-type: none"> - Problem solving capabilities - Collaboration - Courageous, agile - Out-of-box-thinking - Hilti academic initiatives (connections with universities, etc.)
Culture	<ul style="list-style-type: none"> - Giving + seeking feedback - Commitment to the extraordinary - Responsibility for result (not for steps) - Success and failure – learn and unlearn

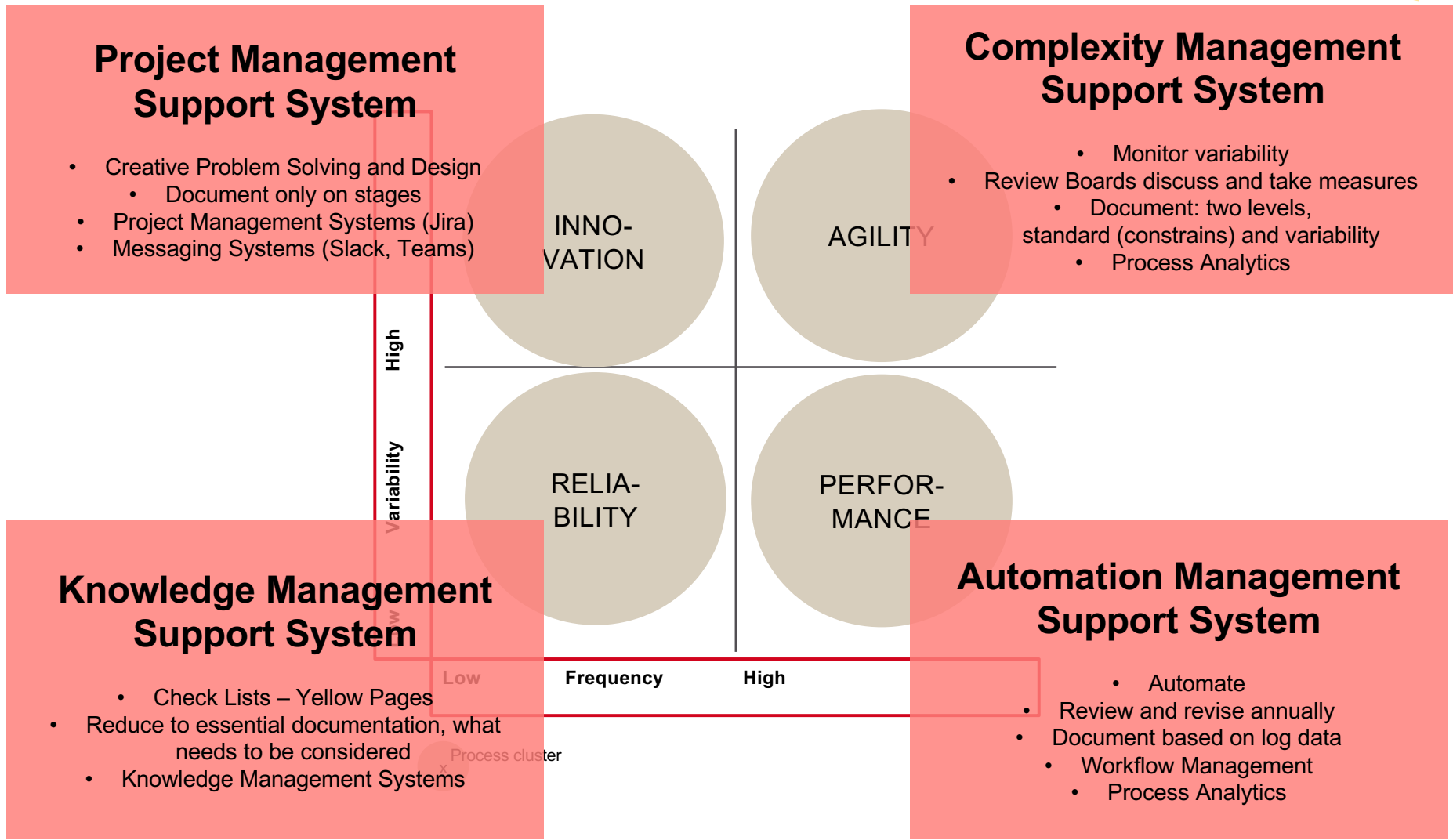
Performance

Example

Strategic Alignment	<ul style="list-style-type: none"> - Efficiency KPIs: Time, cost and quality
Governance	<ul style="list-style-type: none"> - Instant countermeasures - Constant monitoring - Tight ties + carrot & stick approach
Methods	<ul style="list-style-type: none"> - Standardize process steps - Process models, standardized processes, less variants - Process redesign + rapid implementation - Lean + quality management + CIP
IT	<ul style="list-style-type: none"> - Standard ERP - Workflow - Automation, e.g. RPA
People	<ul style="list-style-type: none"> - Reliable, hard-working, well trained people
Culture	<ul style="list-style-type: none"> - Stick to standard - Reliability & Discipline - Improvement

4 Different Process Logics

Work in Progress



Why a BPM Billboard?

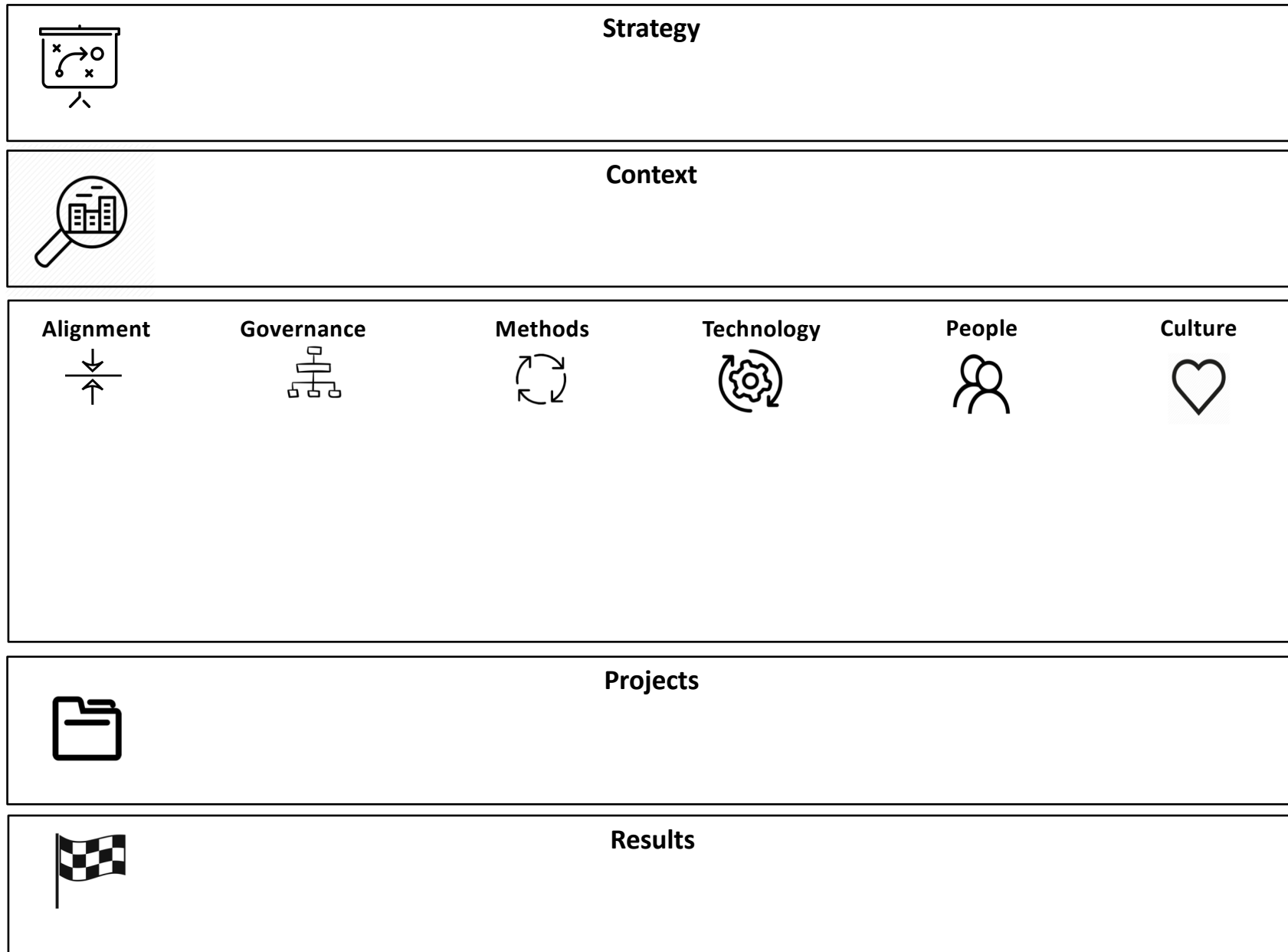
What is the BPM Billboard?

One deep dive into the BPM Billboard

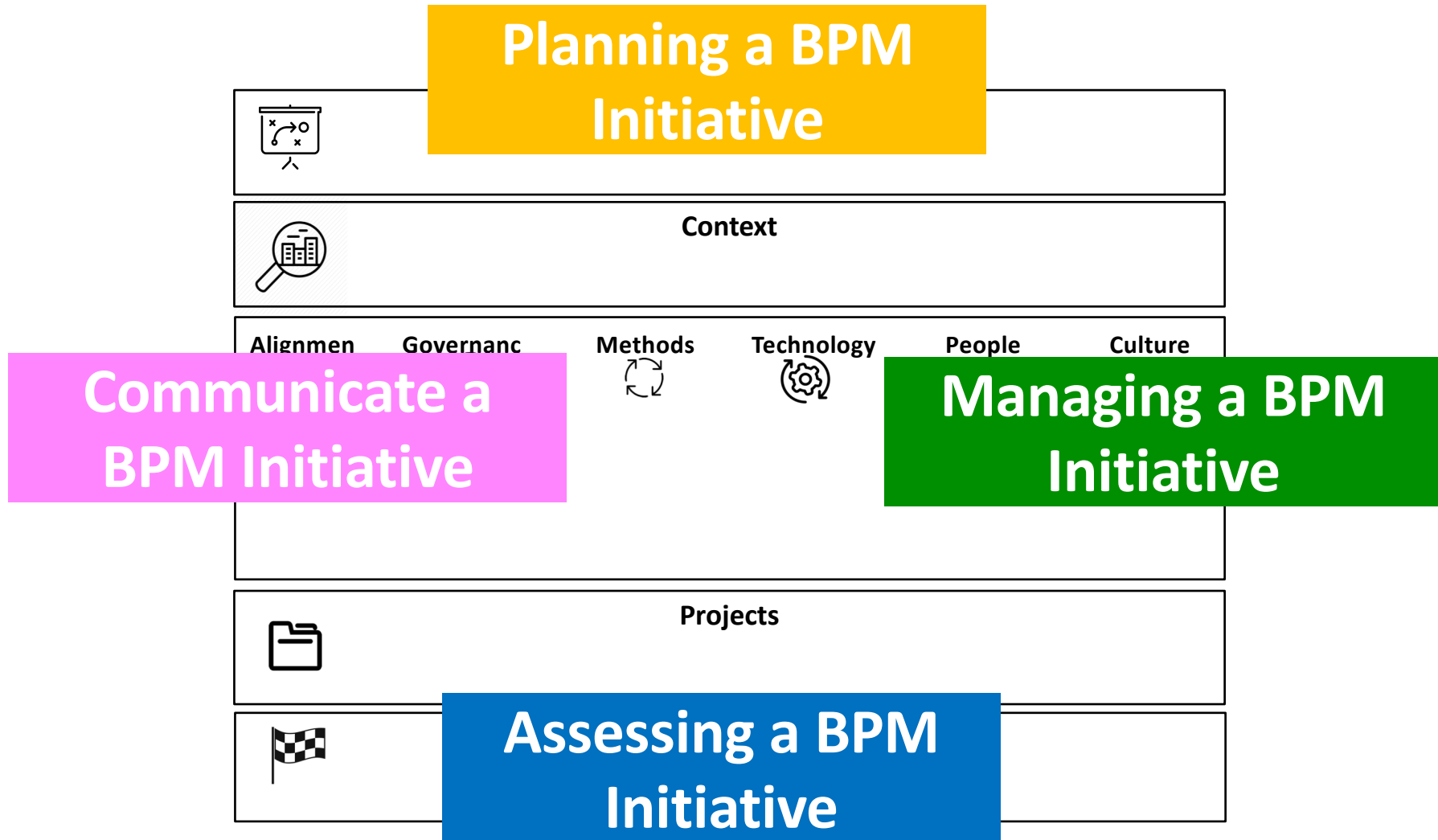
Using the BPM Billboard

Summary & Outlook

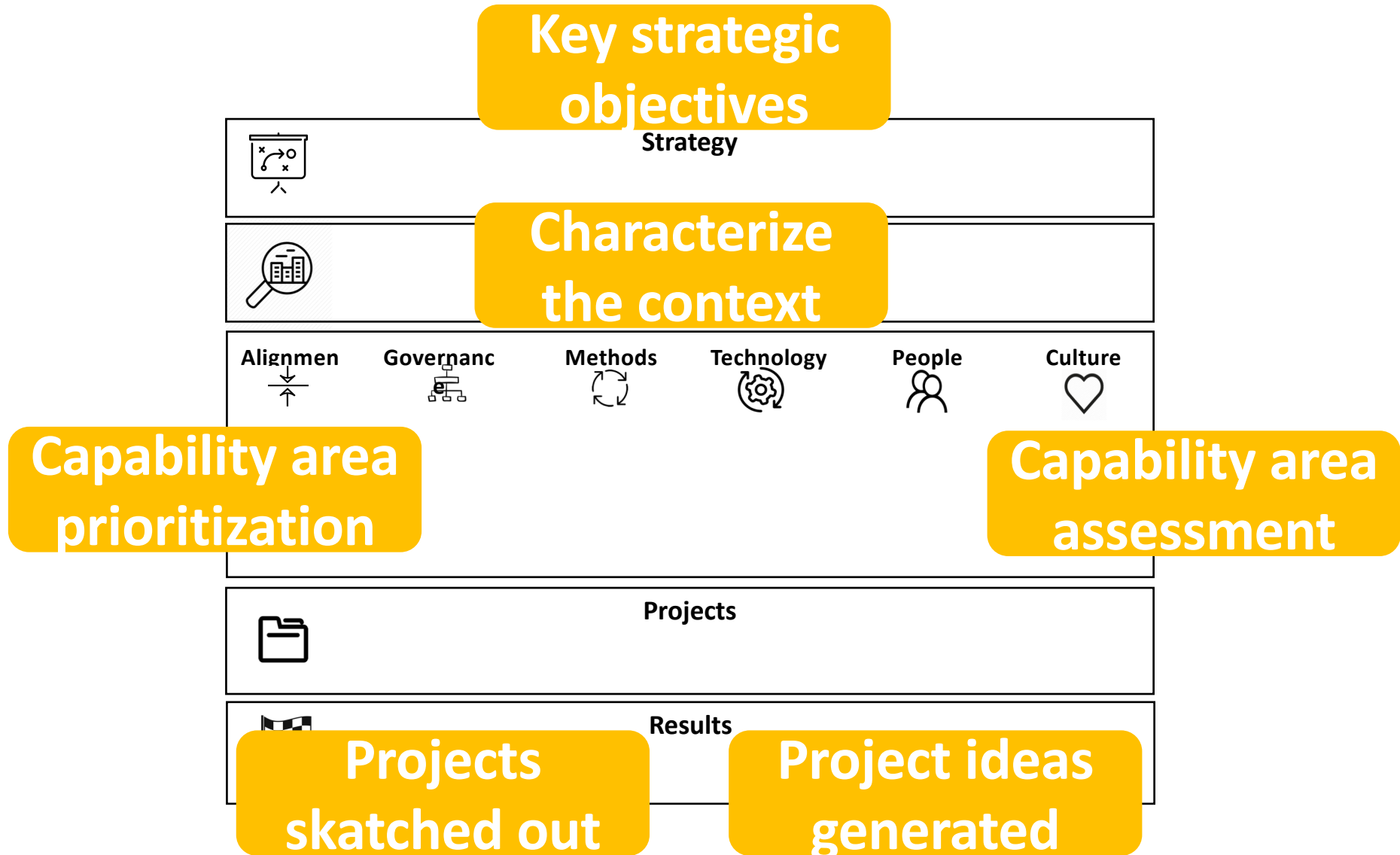
How to work with the BPM Billboard?



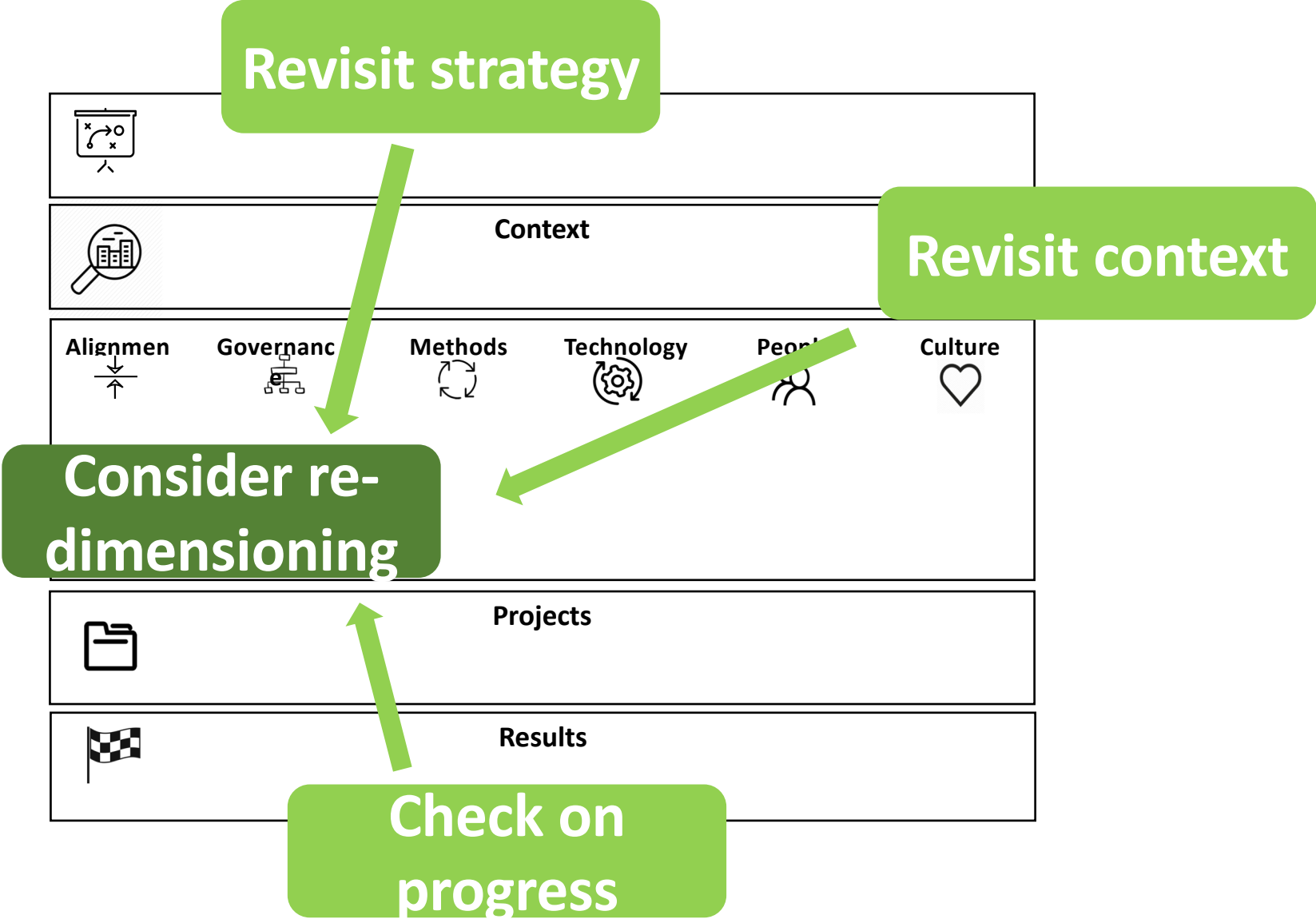
Using the BPM Billboard



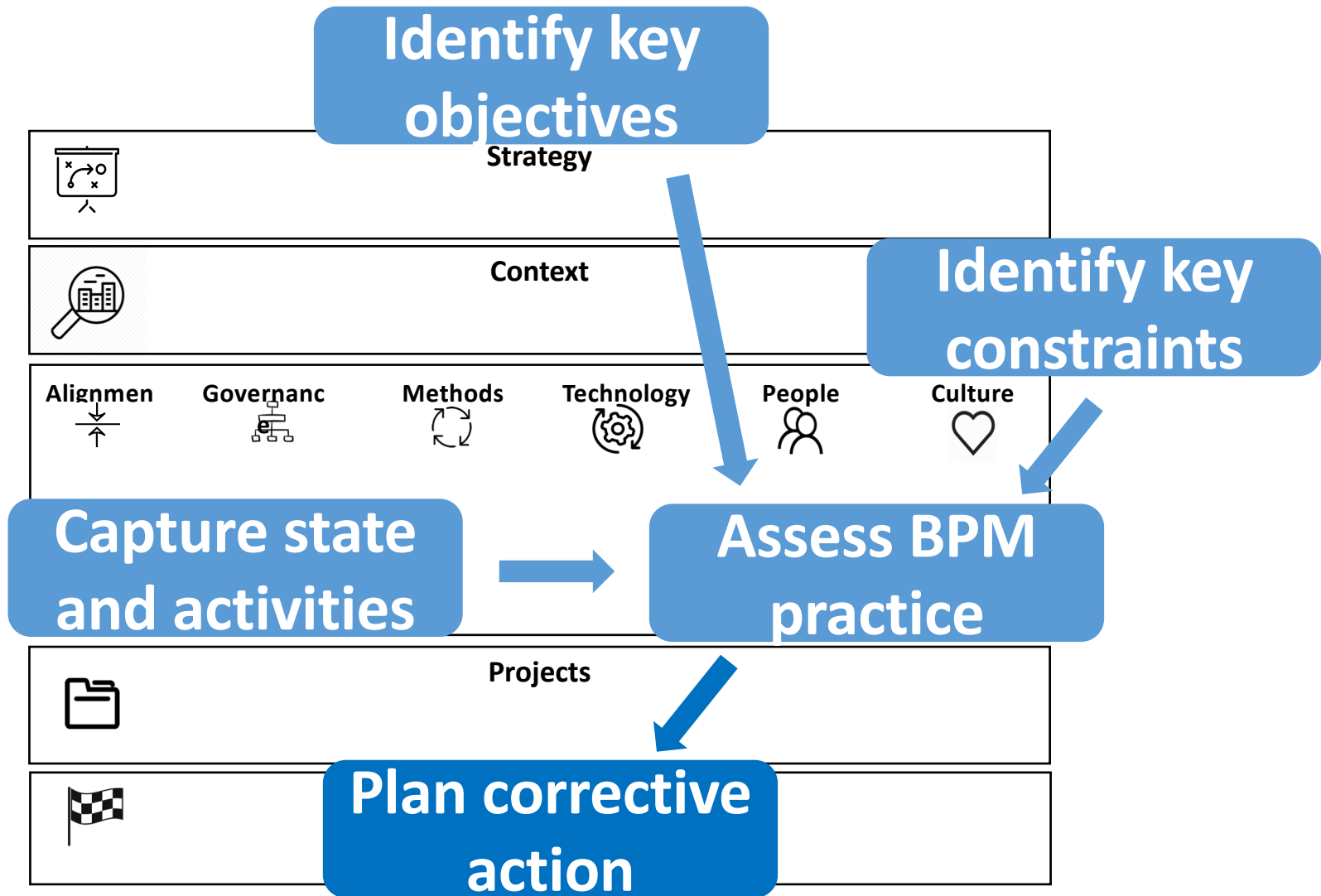
Planning a BPM Initiative



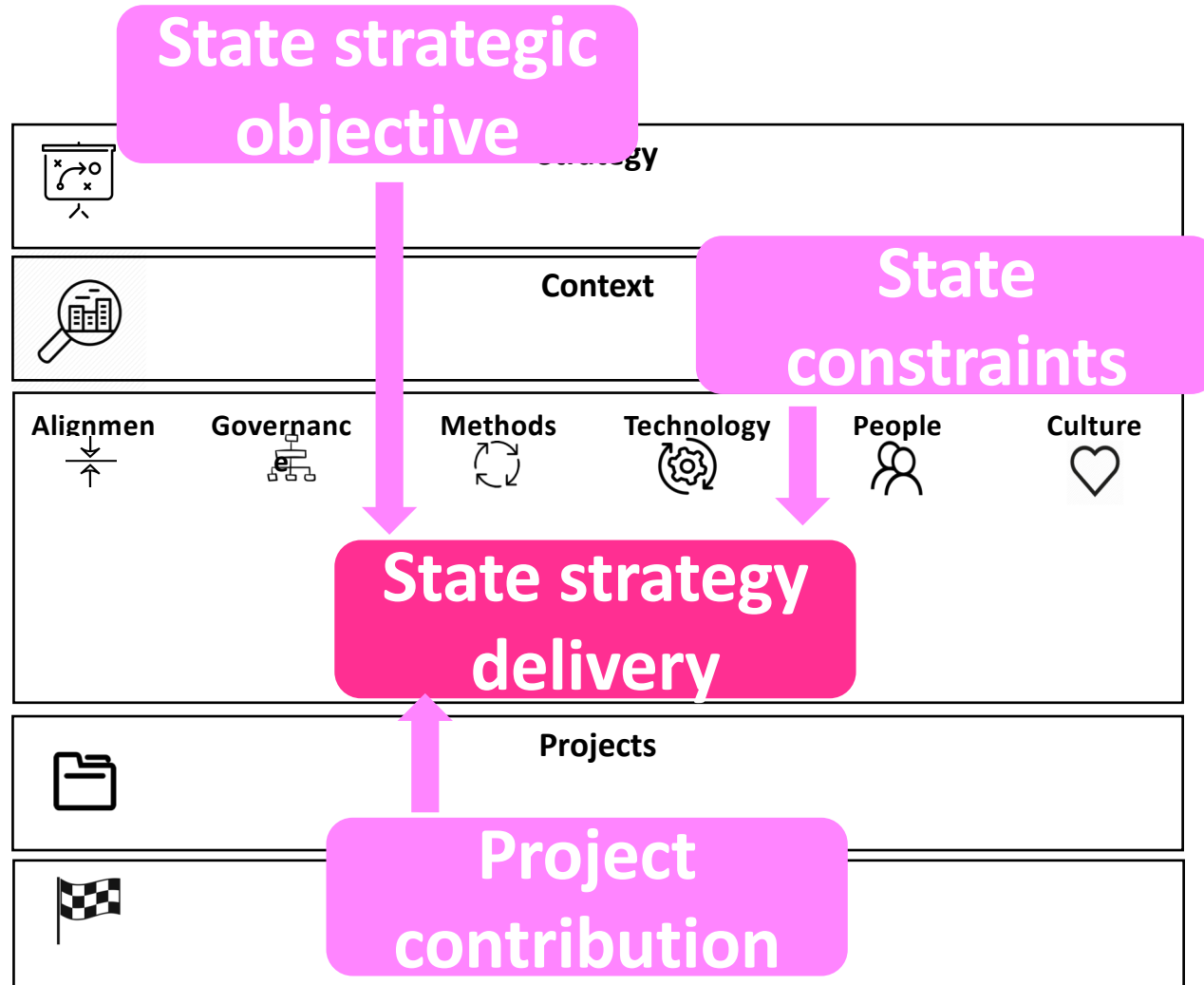
Managing a BPM Initiative



Assessing a BPM Initiative



Communicating a BPM Initiative



BPM Billboard

Successful process management using the BPM billboard

What's the BPM billboard and why should you use it for your organization?

The BPM billboard is a tool to plan and scope your BPM initiatives. It is a one-page representation of the most important aspects for you to consider. The billboard is essential to better plan, communicate and coordinate your BPM initiatives. Its structure assures your BPM initiative (1) is aligned with your strategy, (2) considers the relevant organizational context, (3) is focused on developing capabilities inside your organization, and (4) defines specific and feasible projects to get there.

How to use the BPM billboard

Use the BPM Billboard and the separate worksheet to outline your BPM strategy. Refer to the instructions and hints. Capture relevant objectives and define constraints by writing them down on the Billboard. Plan your measures step-by-step and communicate results. Update the Billboard continuously to improve your BPM initiative. You can further develop the Billboard of your initiative in the Signavio Transformation Suite. In this way, you facilitate planning and implementation of your BPM initiative.

Analyze to what extent you have contributed to the achievement of your strategic goals:

1. What contribution has BPM made to implementing the strategy?
2. Which improvements can be substantiated based on key performance indicators?
3. What are your learning experiences and where should you readjust?

Refer for example to your assessment of the key success factors.

Characterize the main competitive forces affecting your organization:

1. What are the constraints and opportunities of your organization?
2. Who are your suppliers?
3. Who are your buyers?
4. Who might potentially substitute your offerings?
5. Who are new entrants into your markets?
6. Who are your competitors?

Refer for example to Porter's Five Forces and the BPM Content Framework by vom Brocke, Zett and Schneider.



Assess and plan how to further develop your BPM-related governance:

1. Who are the process owners, process managers, and process analysts?
2. Which procedures are defined for managing and conducting BPM?

Refer for example to BPM Maturity by Roseman and De Bruin.



Which methods are suitable for your BPM initiative?

1. Which methods do you use for process discovery?
2. Which methods do you use for process modeling?
3. Which methods do you use for process analysis?
4. Which methods do you use for process implementation?
5. Which methods do you use for process monitoring?
6. Which other technologies have potential for you?

Refer for example to the Fundamentals of Business Process Management by Dumais, La Ross, Mendling and Reijers.



Outline your organization's current key strategic directives:

1. What are the goals of your organization?
2. What is the board currently most concerned about?
3. What is your strategic agenda?
4. What is the vision for your organization in 3 years?
5. How should BPM help to achieve this vision?
6. What is your source of competitive advantage?
7. Do you strive for leadership on cost or quality?

Refer for example to Porter's Generic Strategies.

How well does your current organizational culture fit with the BPM philosophy? How can you develop your culture accordingly?

1. How strong is your orientation towards external and internal customers?
2. How widespread is thinking in terms of improvements and innovation?
3. How committed and diligent is your organization?
4. How team-oriented are formal and informal structures?

Refer for example to the BPM cultural dimensions by Schmedel, vom Brocke and Recker.

What is the potential of the following technologies for your organisation?

1. Do you use cloud, blockchain, process mining, RPA or IoT?
2. Which other technologies have potential for you?

Refer for example to Gartner Hype Cycle.

Define standards to manage your BPM project portfolio:

1. How do you involve people?
2. How do you organize your projects?
3. How do you communicate results?
4. How do you coordinate multiple projects?
5. How do you deal with change?

Refer for example to project management standards.

9 comments

PAGE 2 9

vivecca.frank 5. Nov Highlighted Text

vivecca.frank 5. Nov @Miguel: Aktuell doppelt sich die Überschrift noch. Ich denke, wir sollten uns auf "Successful process management using the BPM billboard" konzentrieren und "BPM billboard" nochmal extra hervorheben.

vivecca.frank 5. Nov @Miguel: Das Grau des Hintergrunds wirkt etwas müde. Haben wir noch eine andere Alternative? Ich überlege, ob auch die grauen Textboxen eine andere Farbe brauchen. Das Thema BPM braucht natürlich eine gewisse Ernsthaftigkeit, aktuell wirken die Farben des Boards aber noch etwas müde und fahl.

vivecca.frank 5. Nov @Miguel: Sollten wir noch etwas klarer darstellen, dass man das Billboard im Uhrzeigersinn ausfüllen sollte?

vivecca.frank 5. Nov @Miguel: Bitte in Klammern setzen



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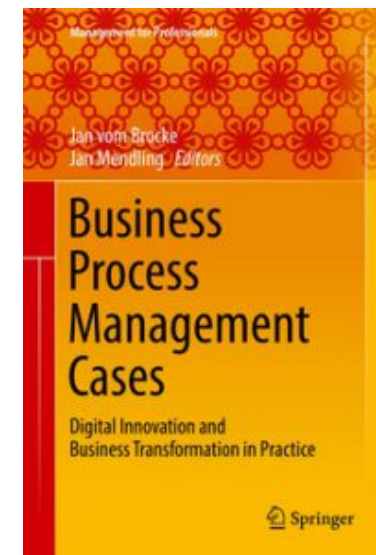
Summary

- The BPM Billboard is a tool to plan and scope your BPM initiatives.
- It is a one-page representation of the most important aspects for you to consider.
- The Billboard is essential to better plan, communicate and coordinate BPM initiatives.
- Its structure assures your BPM initiative (1) is aligned with your strategy, (2) considers the relevant organizational context, (3) is focused on developing capabilities inside your organization, and (4) defines specific and feasible projects to get there.

Outlook

- **Students:** Conceptual model to **structure** the various inputs from classes, talks and papers
- **Practitioners:** Tool to assess your BPM approach and further **develop** BPM strategically
- **Researcher:** Agenda to further drive BPM **research** towards the most exciting and useful direction

Watch out



Thank you!



Prof. Dr. Jan vom Brocke

The article



Web



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References (1(2))

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