

Avoiding The Pitfalls Of BPM

Finding the right workflow solution for your needs.

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Section 01

What is Business Process Management (BPM)?

Abstract

Are you looking for an elegant solution to a handful of workflow problems or a complex solution to manage all your organization's business processes? The solutions for these two scenarios are quite different.

What is BPM?

Everyone has their own definition of Business Process Management (BPM).

A general [definition](#) is:

Business process management (BPM) is a systematic approach to making an organization's workflow more effective, more efficient and more capable of adapting to an ever-changing environment.

That's a pretty broad definition. But basically, BPM is implementing a system that allows an organization to automate business processes, execute business rules and then pull audit and performance reports.

Any company that currently has manual, labor-intensive processes for managing requests, submitting information, routing approvals, etc. can benefit from employing some kind of process automation solution. The benefits fall into a few buckets:

- Faster, more efficient execution
- Accurate processing of information
- Improved accountability/visibility
- Better communication

These benefits vary across industries. For instance, companies who have strict compliance needs, such as finance and healthcare, highly value accountability. They look for solutions with detailed historical audit trails that will satisfy the needs of both internal and external auditors for activity histories of who did what and when. Meanwhile, companies handling thousands of requests a day, for instance a consumer-focused mobile phone company, value processing speed improvements.

Section 02

BPM Software as a Solution

The traditional business process management system is often referred to as a BPM Suite, BPMS (Business Process Management Software) or, more recently, iBPMS. BPM Suites provide a tool for business process automation, but also include a variety of additional features like process simulation, process modeling, process analysis, case management, document management, service catalogs and more. BPM suites are usually put in place as part of a larger re-organization within a company in search of a full-scale, enterprise wide overhaul seeking to centralize all departments and business units at once.

BPM Software Challenges

As you might imagine, approaching process management from a broad, enterprise-wide perspective is challenging. There are numerous departmental chasms to cross for one thing. For another, managing a project of such scale and complexity, involving so many people and viewpoints requires equally deep and complex software. This has caused BPM suites to evolve into ungainly, modular tools that try to solve every problem a BPM project team might encounter by adding additional components.

In addition, because of their complexity, most BPM Suites are not owned by business users, rather, administration is generally left in the hands of the IT department, requiring excellent interdepartmental coordination between business owners, IT/business analysts, project managers, enterprise application teams, etc.

Needs Mismatch

The problem for some companies is that they are looking for a simple solution to a handful of process problems and they don't need, nor do they want, an overwhelming set of options and tools that are intended to manage every process in the business.

When they research vendors that provide BPM Suites, they are typically finding these complex tool sets to build the most elaborate solution possible in the most complex way possible, rather than a straightforward, best-tool-for-the-job approach.

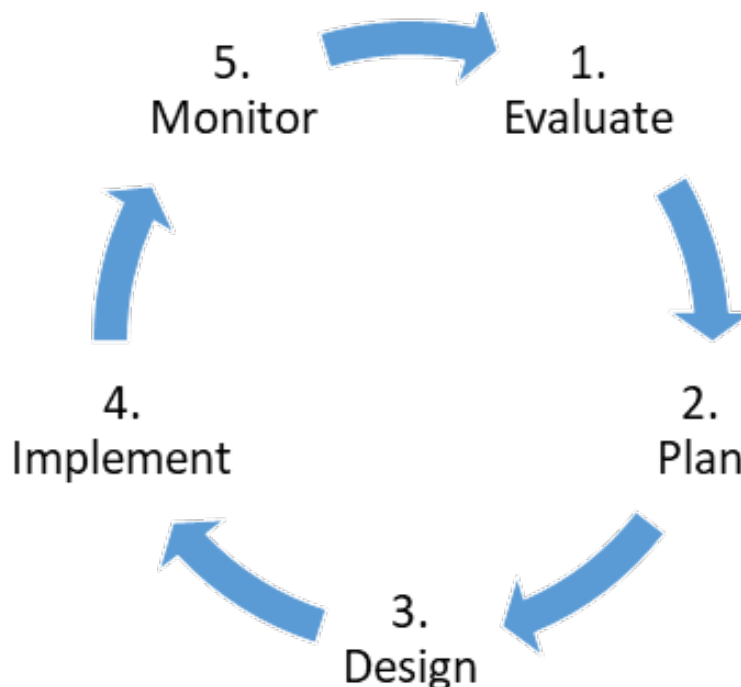
Rather than being able to tackle a critical, required process with a solution that can be up and running in a matter of days, organizations that invest in a full-scale BPM solution discover they're paying too much and spending months or years on a project implementing an enterprise-level BPM system **they simply don't need**. For these businesses, workflow management may be the better answer.

Section 03

The Alternative: Workflow Management

Workflow Management can also be thought of as “Lean BPM” and is distinguished from traditional BPM suites in its focus on the quick deployment of process-driven applications (such as purpose-built forms and web apps) rather than broad-reaching enterprise-wide initiatives. The latter typically involves project lifecycles of several months, and often 100s or even 1,000s of vertically-integrated function points. In contrast, workflow management can be applied to targeted areas to realize immediate benefit, without imposing the deployment overhead and integration effort involved with those environments.

The goal of workflow management is to rapidly deliver horizontal, process-driven solutions that solve problems quickly and then iterate toward improvement. Solutions are built using an agile methodology:



This replaces the traditional “waterfall” approach taken when implementing enterprise-wide efforts that require significant upfront analysis, modeling and re-engineering deployment. Again, the goal is rapid design and implementation.

By cutting down on deployment time, businesses can realize process improvement benefits more quickly. This can mean hard dollars when the process is both critical and tied to revenue generating or revenue preservation activities.

For instance, an inefficient, manual capital (CapEx) or operational expenditure (OpEx) request process, is a common issue for many organizations. Approval cycle times can balloon to several months when the process is disjointed and easily bogged down. This can slow the growth of an organization in several different ways:

- Delays in the approval of replacement resources (e.g., replacement of faulty equipment)
- Delays in geographical expansion
- Improperly-approved expenditures
- Slowed innovation
- Unnecessary administrative overhead

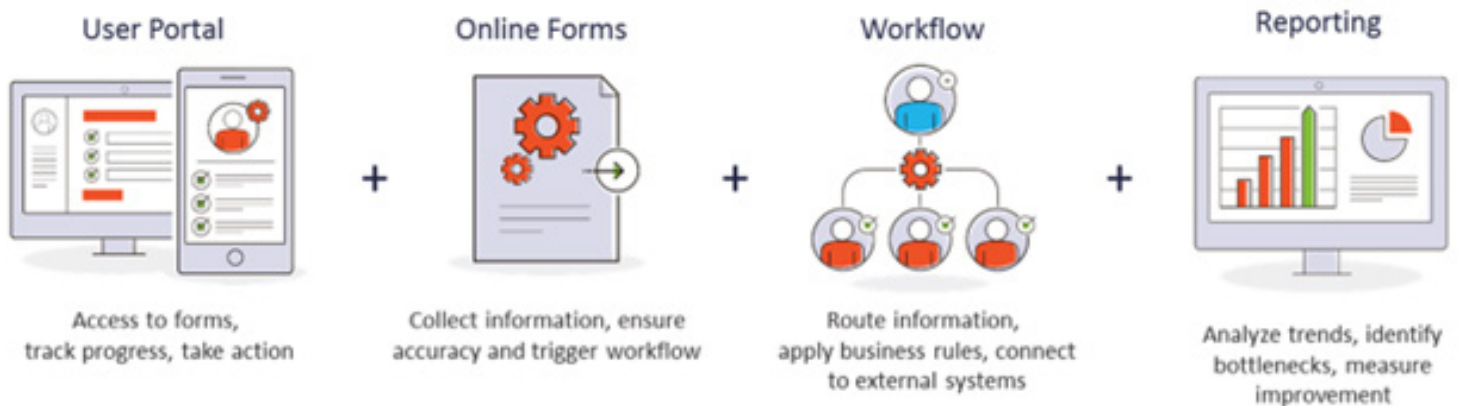
A workflow management system can be used to create a purpose-built, automated CapEx/OpEx Request Process within a few weeks (depending on the complexity) and the organization can quickly reduce approval cycle times and reducing risky spending.

For rapid development of process-driven applications, particularly by non-programmers, what will inevitably be more useful is the simpler flowchart metaphor combined with wizard-driven configuration ability of process attributes, such as routing, rules and task definition.

Section 04

Portal + Forms + Workflow + Reporting

A good way to illustrate most workflow management use cases is through the simple graphic below. There is a place for end-users to submit forms which are routed via pre-set business rules:



Using this model, nearly any process that requires user interaction (usually in the form of data collection) can be automated quickly in a repeatable framework.

Section 05

So, When is Workflow Management Enough?

How does an organization know if it needs a BPM suite vs. a workflow management system? The demands and intricacies of the processes that will be managed, as well as the time and resources a company can afford to commit to automating those processes, will dictate which solution is right.

Some indicators that Workflow Management may be the right answer:

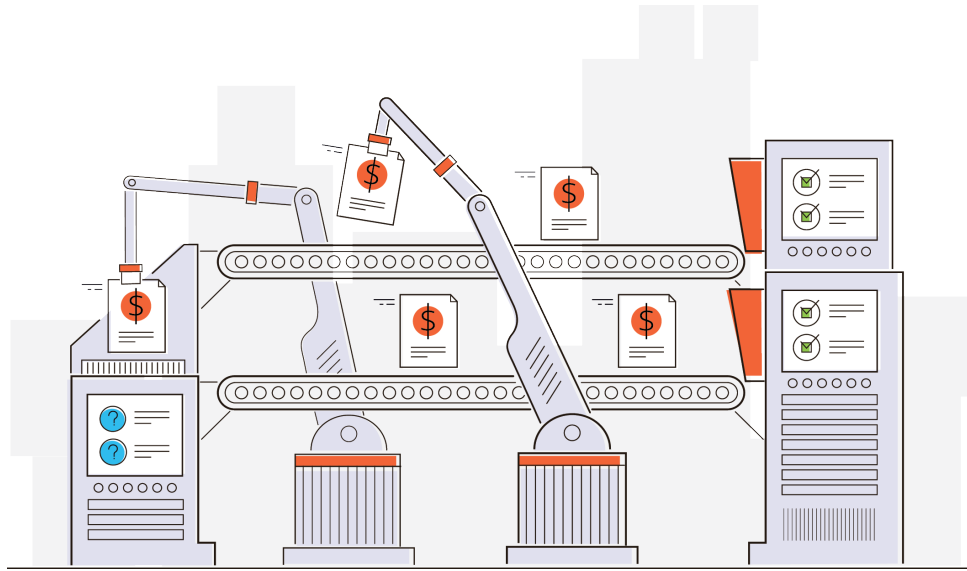
- **Scope:** List the processes in need of automation. Are they confined to only a few departments or business units?
- **Ownership:** Who should “own” workflow management for the processes being addressed? Should the business owners be able to administer it or IT? In some cases IT simply may support, rather than owning it.
- **Process Types:** Examine how processes begin—are most of the required processes started by an end-user making a request (a “request” could be anything from reporting an incident to requesting approval on a document)?
- **Timeframe:** Decide what the timeframe is for implementation—how soon does the system need to be launched? Can you wait for a long-term enterprise-wide effort?
- **Resources:** Next, decide what staff resources can be committed to the implementation—can some personnel spend the time building the workflow system from the bottom up, or is an out-of-the-box system that will only take a limited amount of staff hours to employ necessary?
- **Methodology:** Are process owners comfortable with an agile method of building automated processes? This means building a viable solution and then iterating and improving over time.

Every company has large number of manual processes, but about 80 percent of them are fairly simple in nature—the impetus being a request from an end-user— User A needs this, the request needs to go to User B for approval, and once it’s approved it’s sent to User C to fulfill. These requests can be handled quickly and easily with a workflow management system while also allowing processes to scale from simple to complex.

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Quickly automate **any form**
or process without code and
improve your workflow.





Section 06 Summary

For companies who want to rapidly and simply automate manual tasks in the fastest, easiest manner, workflow management may be just the right fit. The benefit of going with an off-the-shelf workflow management solution for these organizations is that they can be managing their processes within a few weeks rather than several months to a year.

A workflow management system allows companies to distribute process management to business users within the organizations rather than relying on one person in the IT department to handle additions and changes because it's easy to use.

[Examples of processes](#) that can benefit from optimization using workflow automation software can be found on the next page.

IT/IS

[IT Service Requests](#)

[Security Access Requests](#)

New Account Setup

[Change Requests](#)

[New Project Requests](#)

[Security Incidents](#)

Finance

[CapEx/AFE Requests](#)

Expense Approvals

Salary/Wage Changes

[AP Automation](#)

[Grant Management](#)

Marketing

Campaign Approvals

[Collateral Approvals](#)

Brand Management

Facilities

Office Relocations

Resource Scheduling

Facility Access

Move Requests

Sales

Quote Approvals

Pricing Discounts

Proposal Approvals

Product Discounts

Legal

Legal Holds

[Contract Reviews](#)

[Client Intake](#)

HR

Benefits Changes

[Timesheet Approvals](#)

[New Hire Management](#)

[Employee Onboarding](#)

[Employee Offboarding](#)

Vacation Requests

Purchasing

[Procurement Process](#)

[Capital Approvals](#)

[Vendor Management](#)

[Invoice Approvals](#)

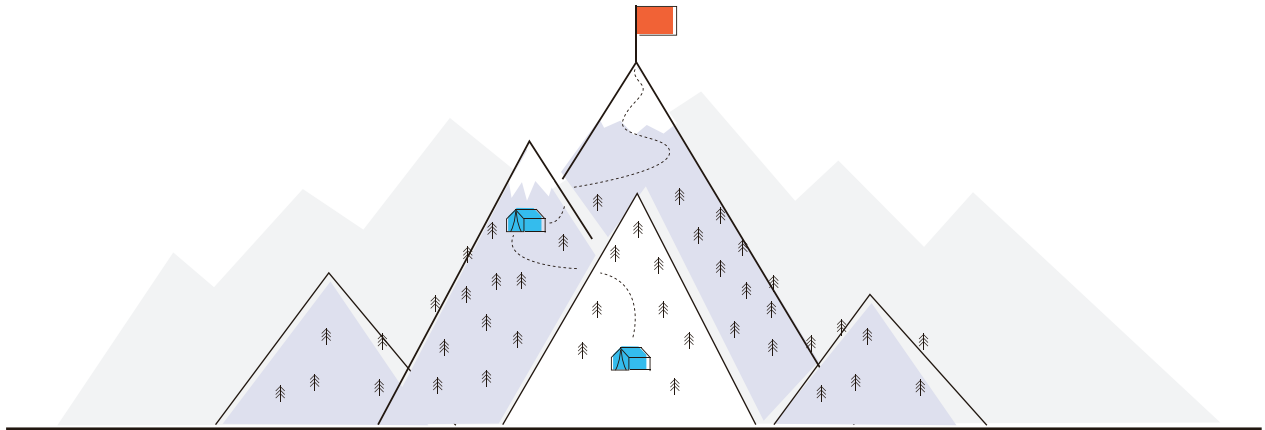
Product Pricing

Operations

[Complaint Management](#)

Maintenance Request

New Product Request



Section 07

The Integrify Advantage

- Costs are reduced and employee productivity is increased by reducing approval cycles, minimizing processing errors and streamlining business processes.
- Business processes can be created and modified without programming in a matter of hours, and there is no client software installation required.
- An intuitive Web-based interface reduces the learning curve and extends the administrative capabilities to any area within a company.
- Minimal training is required for using the system so employees can begin using the processes immediately, and business analysts can quickly deploy and modify business processes without understanding programming or database systems.
- Integrify leverages existing systems, extending their reach to provide error-free data collection, tracking, reporting and visibility.
- Integrify can handle many types of workflow processes at either the department or enterprise level, and will manage requests and approvals in HR, IT, Finance or any other area within a company.

About Integrify



Our Story

Integrify has been a leader in request and approval workflow management for over twenty years. Launched in 2001, with headquarters in Chicago, we've built a reputation for creating software with the customer in mind.

Users value simplicity and integration. That has always been the focus of our product. Rapid distribution, broad scalability, and high ROI are goals that we are constantly reaching, only to set the bar again even higher.

Our Mission

Our job is to ensure customer success by helping them do more efficiently. We are constantly innovating to provide compelling, simple, and adaptable solutions. We believe we can work with customers to build solutions to buck the status quo and make organizations more productive.

Interested in Automating Your Workflow?

We have a variety of resources to help you on your journey to an automated workflow.

- [Request a Demo](#)
- [Workflow Tools and other eBooks](#)
- [Workflow Ideas Weekly email Newsletter](#)
- [Recorded Demos of our Workflow Automation Software](#)
- [2-Minute Quick Demo](#)
- [Why Choose Integrify](#)
- [Building an Automated Process in Under 5 Minutes](#)

