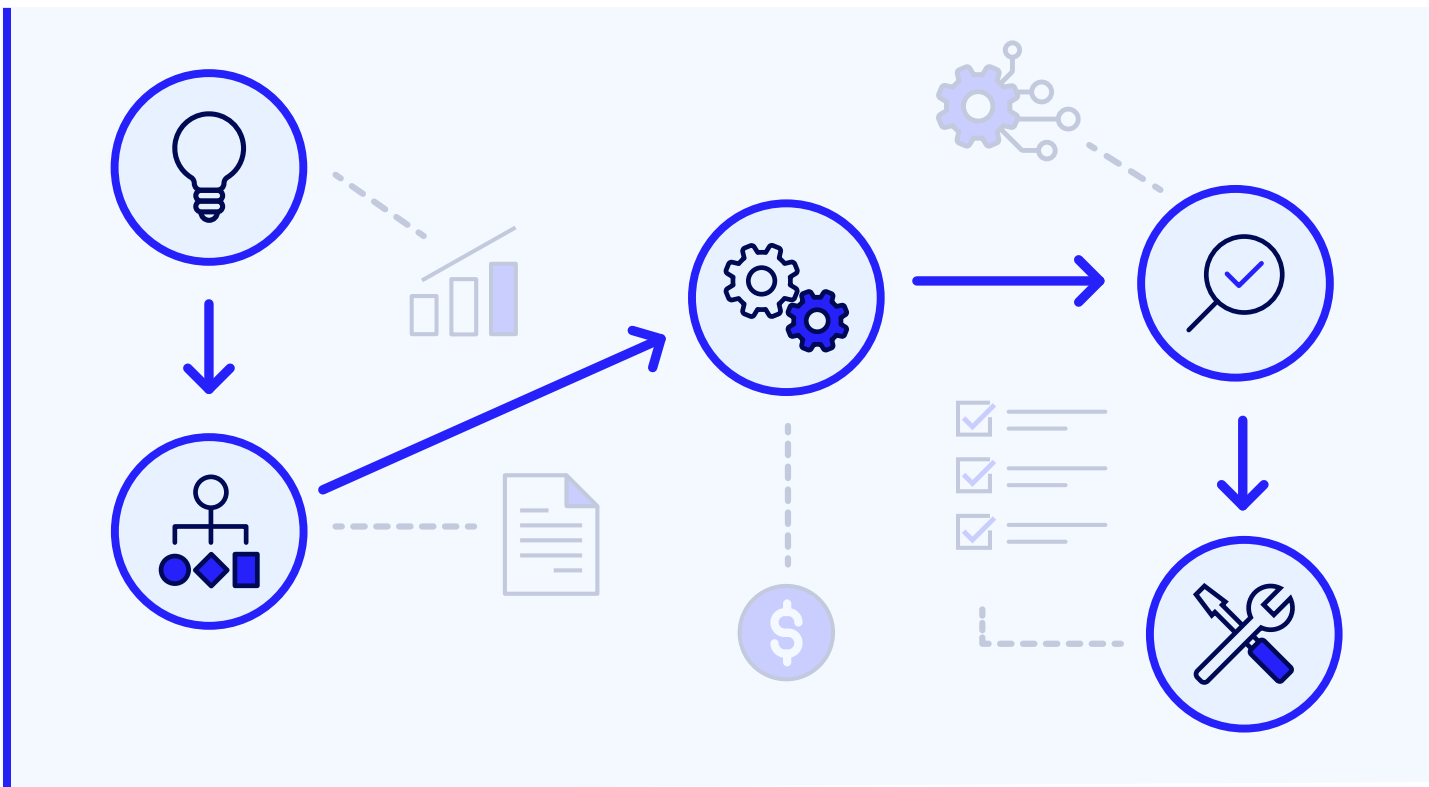# appian

Business Process Management Guide

The Key to Workflow Automation

Introduction.

The way we work has changed steadily over the last couple of decades and dramatically in the last couple of years.

Teams are looking for ways to ease the burden of complex operations, massive amounts of data, constantly changing environmental conditions, and increasing demand to do more in less time—and at a lower cost. Business process management (BPM) offers a means of addressing these challenges.

When people hear BPM, they often think of software. But BPM is much more than that; it's a discipline for discovering, designing, executing, measuring, and optimizing an organization's processes. BPM technologies can play a vital role in every step of your effort to make processes more efficient. And while it may seem complicated in principle, it doesn't have to be in practice. This document will walk you through the BPM fundamentals, address common questions, and provide the information you need to successfully complete your digital journey.

Contents

What do we mean by "process"?

A process is a series of repeatable steps, tasks, and decisions that achieves an organizational objective. Sometimes known as workflows, processes are everywhere in your organization and come in many forms:

- Simple, like fulfilling an order.

- Complex, like developing a new product.

- Short-term, like onboarding an employee, vendor, or partner.

- Ongoing, like regulatory compliance.

- Function-specific, like proposal management.

- Industry-specific, like energy procurement.

Some processes, such as billing, can exist within a single department. Other processes, such as strategic sourcing, run throughout an entire enterprise. They may even extend beyond the organization and across the value chain, as is the case with supply chain management.

So, what is business process management?

Business process management is a people-driven discipline organizations use to create and manage processes that continually improve business results. It focuses on the entire process rather than individual tasks, which helps strengthen performance, KPIs, and outcomes—and results in fewer errors, happier customers, and lower costs.

BPM comprises a series of steps, which, when combined, are highly effective in creating value for an organization:

Discover

Determine your process's current status, which will serve as a basis for comparison throughout the remaining steps.

Design/model

Starting from the "as-is" state, craft the "to-be" state of your processes, focusing on the desired areas of improvement. Introduce "what-if?" scenarios to the equation to see how individual changes will impact the process as a whole.

Execute

Put your process design into operation.

Measure/analyze

Track your process and gather statistics on its performance.

Enhance/optimize

Use your analysis to determine whether further improvement is possible.

Technology's role in BPM.

Every business process has both a human and a technology element. Certain tasks require human intervention, while others are much more efficient when automated. The BPM discipline can help you make sense of this segregation of duties, but from a much more holistic perspective than if you were to look at each task individually. This approach will also guide you in knowing when and how the various BPM technologies should be used to maximize value.

In this digitally driven business world, BPM technologies play a big role in workflow automation. They bring processes, data, and software together to orchestrate and coordinate actions across enterprises, whether those actions are steered by onsite or remote employees, virtual workers, or smart technologies, such as machine learning (ML), artificial

intelligence (AI), and robotic process automation (RPA). This allows work to be done faster, more precisely, and more effectively, while decreasing errors and costs.

From simple, department-level tasks to global workflows, the benefits of automation include higher business resiliency, increased productivity, greater reliability, improved availability, increased performance, and reduced operating costs. As the complexity and scale of processes requiring automation increase, so does the need for stronger and more comprehensive orchestration capabilities.

In the remainder of this section, we'll look at the BPM steps outlined earlier and explore some of the technologies that will help you achieve your process automation and optimization goals.
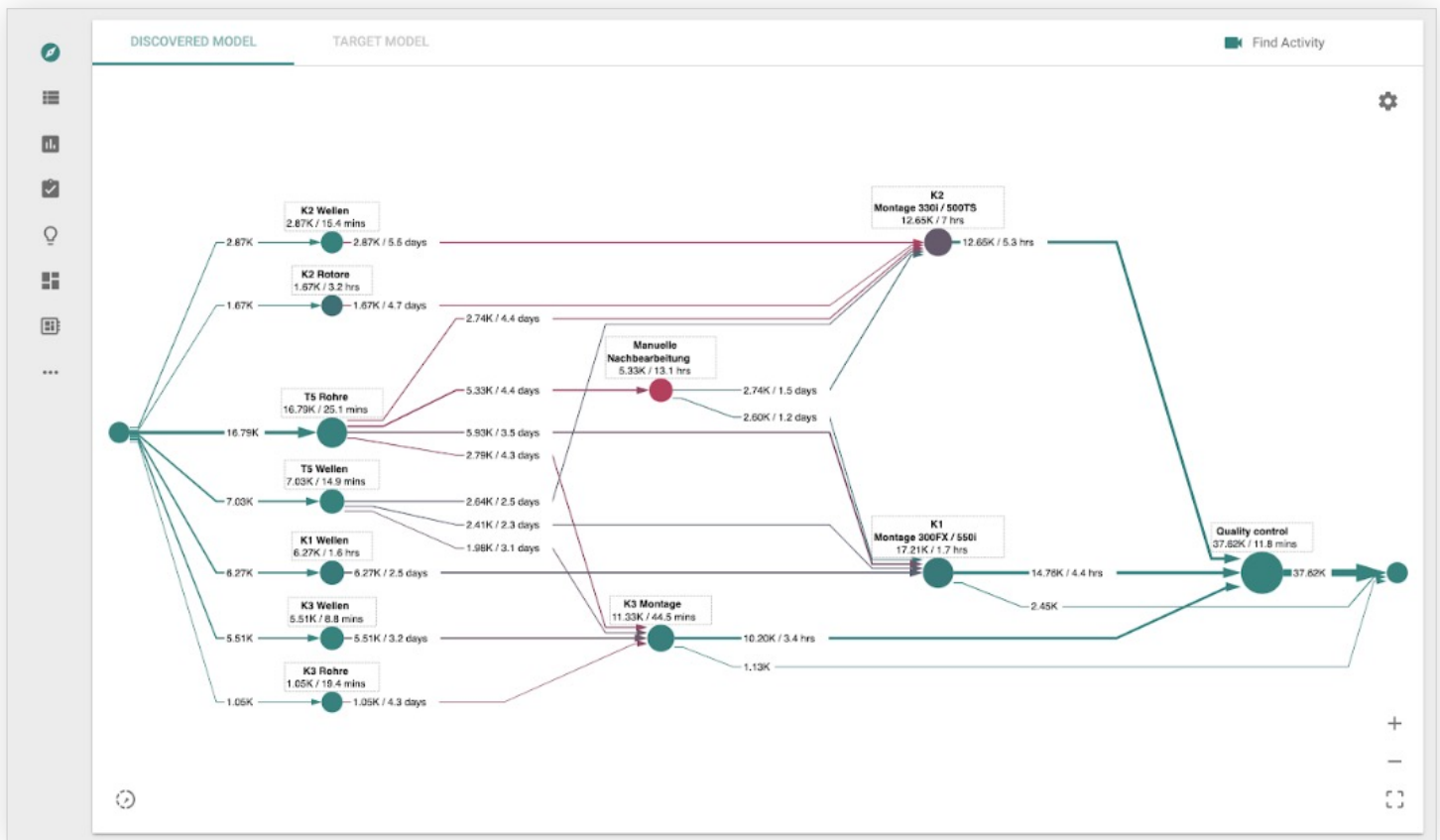
Sample process mining tool output

Discovering your processes.

A primary goal of many BPM initiatives is to automate tasks or activities within a workflow. This may be done, for example, to achieve greater efficiency, lower costs, or improve compliance. But, before you can automate an existing process, you need to identify it, define it, and document it—which is no trivial task. Traditionally, this has been done manually by collecting data, tracing the steps, and interviewing the people and groups involved. A more modern approach is to use process mining technologies.

Process mining uses data science and machine learning to analyze operational system log files and create clear and concise maps of your processes. It replaces the subjective and costly interviews with a data-led and fact-based approach to documenting how work actually happens. This data-driven approach provides insight into what people, systems, and organizations are actually doing, as opposed to what we think they're doing.

Process mining is a great complement to BPM. It provides insights you can rapidly translate into action to achieve positive business outcomes much faster.

Process mining provides insight into what people, systems, and organizations are actually doing, as opposed to what we think they're doing.

Designing and modeling better processes.

Once you've done the discovery work and have a clear picture of your "as-is" process, you can begin mapping out your "to-be" process. Much as process mining technology helped in the discovery phase, low-code application development can make process design and modeling much faster and more efficient, for example:

- **Model processes** with the visual functionality of low-code application development. Multidisciplinary teams including IT, citizen developers, and certain business users can use visual paradigms similar to a flow diagram to create process models for their applications. These process models can then be saved for reuse by other applications and faster design in the future.

- **Automate** wherever possible. The visual and modular nature of a low-code platform makes it easier to

orchestrate data, workers—people, AI, and RPA—and systems across the organization, greatly extending the reach and impact of automation.

- **Apply business rules** to identify, implement, and consistently replicate important policies and procedures, such as spend request thresholds, tax brackets, and approval chains, thereby driving improved governance and compliance.

- **Adapt to changing situations.** BPM enables organizations to quickly track, analyze, and adapt to evolving conditions, like changes to business events and regulations.

- **Embed workflow in apps.** Using low-code development, organizations can quickly build forms, intuitive user interfaces for web and mobile, and dashboards for employees, customers, and partners.
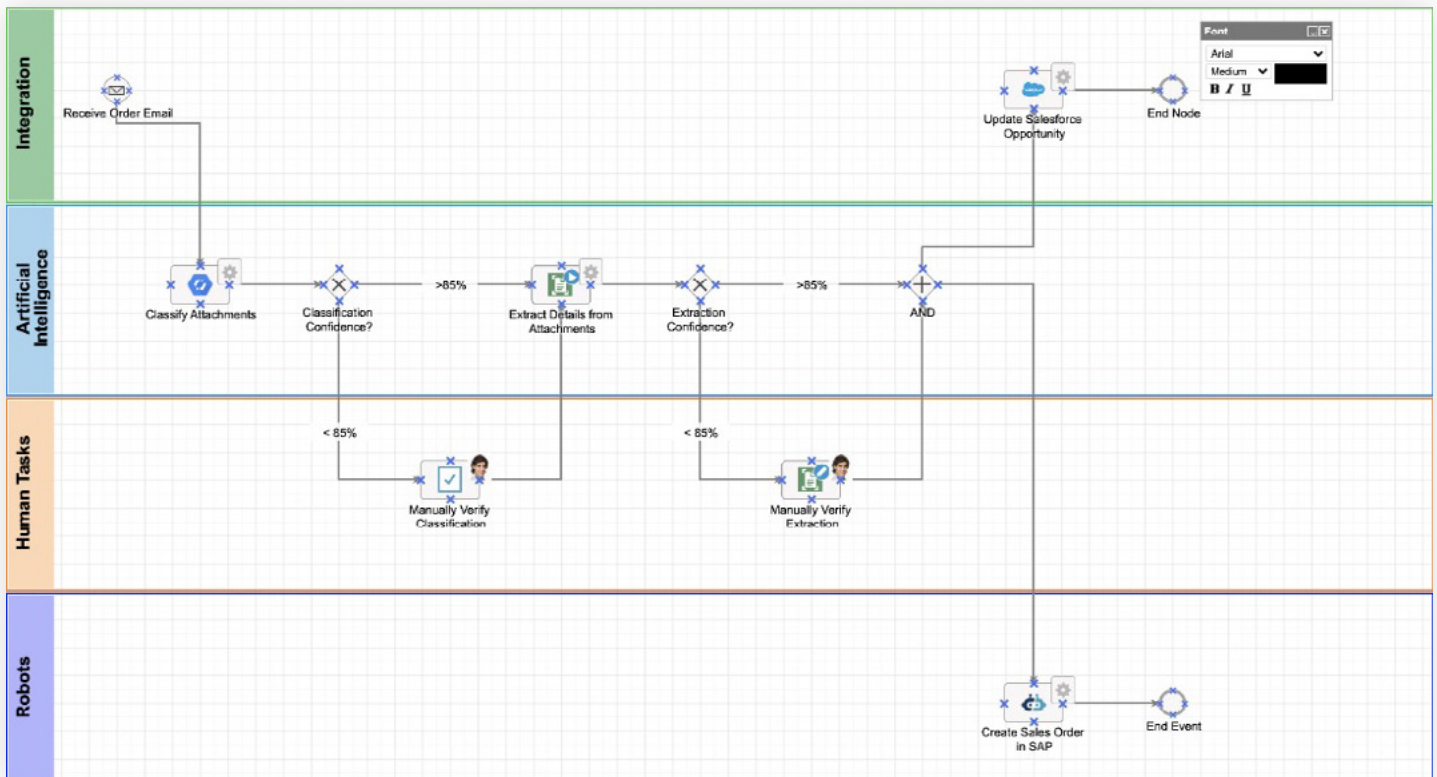
Executing your process workflows.

Once your design is complete and you're confident you've incorporated as much automation into the process as possible, it's time to put your workflow into action. Here too, low-code development delivers value above and beyond traditional application development.

When bringing your new workflow into production, there are three things both IT and business users will demand: speed, security, and integration. Satisfying these demands with the right technologies will greatly enhance the success of your BPM initiative.

- **Speed:** When using a platform for BPM that natively supports DevOps, you can build and deploy a workflow application as soon as the design is complete. And once you build the app, you can run it anywhere; the app will look and behave exactly as intended on any device,

including any kind of mobile device on any operating platform, with no extra work or cost. This saves time for both your developers and users, who need to access their workflows while on the go and require a seamless experience when doing so.

- **Security:** You don't need to swap speed for security. Enterprise-grade low-code BPM platforms are covered by robust security certifications that drive compliance in all areas you conduct business. Advanced business activity monitoring and other governance capabilities keep your applications running and ensure business continuity.

- **Integration:** When business data is scattered across databases and systems or in on-premises, cloud, and SaaS environments, low-code connectors and APIs bring everything together. Your workflow will deliver complete information and insights for more impactful decision-making, no matter where your data lives.

Build once and deploy anywhere, across all channels and mobile devices.

Measuring and analyzing process performance.

Executing your workflows is by no means the end of the road. An effective BPM discipline requires continuous monitoring. This is the phase where data is gathered and analyzed so you can assess how your process is performing. The technologies you use for these assessments will shine a light both on the successes from your orchestration and automation efforts as well as the areas where work is still needed.

Process mining can once again be a valuable asset during this phase. By mapping the new "as-is" process against the analysis conducted during the discovery phase, you'll have a one-to-one comparison of the "before" and "after" states. If you find certain areas of your process are not performing as well as hoped, you can dig deeper to get at the heart of the issue.

But rerunning new log files through a process mining tool isn't the only way to assess performance. This is where the power of automation comes in. You can leverage built-in, real-time management tools and analytics to monitor in-flight processes and performance, reassigning tasks as needed to increase efficiency. With this kind of visibility, you can quickly make changes that can have a significant, positive impact on your business.

Enhancing and optimizing processes.

It's likely your analysis in the measuring and analyzing step uncovered additional opportunities for improvement. But even after those opportunities are addressed, your BPM efforts will not be over and done with. BPM must be an ongoing practice to continuously enhance and optimize your processes as new technologies are introduced, your teams experience turnover, and your organization grows and evolves.

Needs and demands will change and unexpected events will occur, but BPM can be a significant help in overcoming new challenges.

BPM technologies can drive continuous optimization by helping you do the following:

- **Adapt to changing situations.** BPM enables organizations to quickly track, analyze, and adapt to evolving conditions, like changes to business events and regulations.

- **Continuously improve processes** with the insights to evolve business performance.

- **Aggregate process history and analysis** to proactively identify and address bottlenecks and inefficiencies.

- **Leverage predictive analytics** using past performance data to create smart, self-optimizing processes.

- **Report dynamically,** with real-time visibility into how business operations are performing.

Does your organization need BPM?

Whether you're just getting started with BPM or already have a practice in place, you may be wondering if you will really see any significant impact from considering/reconsidering your approach. Below are some common "symptoms" from businesses, non-profit organizations, and government agencies around the world that indicate a need for new or improved BPM:

- Processes still leave a paper trail—an actual paper trail.

- Employees spend a large portion of their time looking or finding rather than doing.

- System users suffer from "copy-and-paste syndrome," inputting the same information multiple times across many systems.

- Employees' efficiency is throttled—and their patience tested—by silos and a general lack of visibility.

- Customers are delivering redundant information to different business teams—over and over again.

- Customers depend on a single stakeholder for communication, leading to massive bottlenecks.

- Support reps wait hours to get the data needed to complete a customer interaction.

- Different business units or departments have different systems for the same purpose.

Other symptoms that indicate a need for BPM relate to risk, compliance, and customer experience:

- Old systems aren't keeping up with customers' expectations.

- Customers encounter different experiences across different devices.

- Some customer experiences aren't supported on certain devices or channels at all.

- Each operating location has a unique regulatory environment that's continually evolving.

- Compliance systems operate in silos.

- Information has become "needles within multiple haystacks" in your organization.

- By the time employees get the information they need, things have changed again.

- Software doesn't support the latest security and privacy protocols.

And it's definitely time to consider BPM if you're building and deploying apps and seeing these issues:

- Multiple projects focus on problems your IT team is already working to solve.

- No commercial product seems capable of solving your challenges completely and cost effectively.

- Your organization still has hundreds of apps in its backlog, despite having spent huge sums of money on ERP software.

- Your "enterprise automation platform" has turned out to be merely a sales automation tool.

Workflow automation and optimization are just the beginning.

Organizations today must concurrently streamline their workflows, build data into everyday processes, create a positive user experience across devices, and deploy apps and services as quickly as possible.

Modern BPM platforms support all of these digital transformation goals by:

- Helping organizations become more responsive to customer demands.

- Facilitating the integration of data into business processes so users have the right information when they need it.

- Enabling the use of modern technologies—such as robotic process automation, machine learning, and artificial intelligence—in processes.

- Serving as a hub for data and apps to break down barriers between devices and channels.

- Accelerating app delivery using low-code platforms that help development teams keep up with shifting business demands.

- Addressing and reducing technical debt instead of adding to it.

- Connecting workflows across devices and business channels to allow disparate teams to work with each other without disruption.

- Streamlining the flow of information to connect customers and companies and transform your business in the digital world.
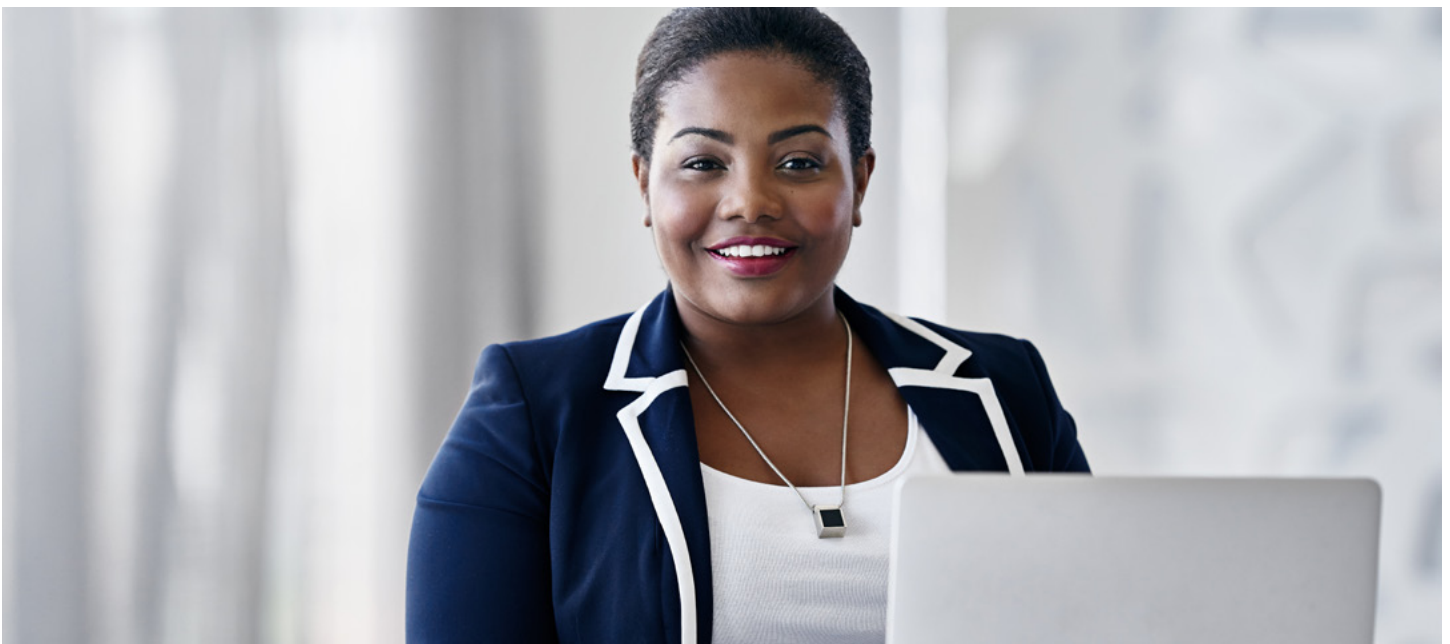
Plan big, start small, and iterate.

The benefits of process improvement can be applied to just about any facet of an organization. But where you start can have a big effect on how successful your BPM initiatives are over time.

The key is to "plan big, start small, and iterate." This means selecting an initial project that can be delivered quickly while having a high impact on the business, promoting your early successes, and pushing BPM best practices out to other areas of the business.

However, there are two key issues to consider before getting started with BPM: the impact that optimizing the process will have on the business (processes that directly impact revenue, cost, or customers, for example), and the complexity of the process (number of process steps, integration points, people involved, etc.).

Ideally you would start with a high-impact, low-complexity process to realize quick and substantial wins. Your BPM technology vendor likely offers services to get you up and running in no time. Promoting this early success (and best practices during that initial deployment) will help drive new BPM projects across your organization.

If your BPM technology is part of a low-code platform, you are in a much better position to take on more complex processes, while also delivering on the promise of rapid and significant impact. Delivering these kinds of results can spark interest in other areas of the organization, driving new automation projects and thereby creating digital transformation as a by-product of organizational innovation.

Modern BPM is ready for today's challenges.

Work today is tough enough, with complex operations, massive amounts of information to navigate, and a workforce powered by humans, AI, robots, and smart machines. Without disciplined BPM, it can be difficult—if not impossible—to achieve and replicate positive results.

Modern BPM technology is up to the challenge. By using BPM to connect process mining and automation, you can discover, design, and automate processes across your organization. IT staff and business process owners get automation, contextual awareness, and instant access to the information they need to take the most impactful action. Organizations of all sizes in all industries can use its speed and power to solve their unique challenges.

Looking for more information on BPM and the technologies that support it? BPM Basics will get you started. You can also see how easy it is to build, use, and change applications that help you stand out in the market by requesting a demo of the Appian Low-Code Platform.

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Appian helps organizations build apps and workflows rapidly, with a low-code platform. Combining people, technologies, and data in a single workflow, Appian can help companies maximize their resources and improve business results. Many of the world's largest organizations use Appian applications to improve customer experience, achieve operational excellence, and simplify global risk management and compliance. For more information, visit **appian.com**.