

# Business Agility

Embrace complexity, adapt quickly  
and exceed expectations



## Dynamic BPM:

*Achieve Faster, More Profitable Results Through  
Improved Business Agility*

Jason Jameson

*Business Unit Executive, BPM, Growth Markets*

8 August 2011



# Our world has become vastly more complex

**\$488 billion**

Lost in process inefficiencies  
in Fortune 500 companies

**\$534 billion**

In mobile transactions by  
2015

**85%**

Of enterprises use  
external cloud services

**50%**

Of businesses plan to adopt more  
collaborative sourcing models

**70%**

Of businesses outsource one  
or more strategic activities

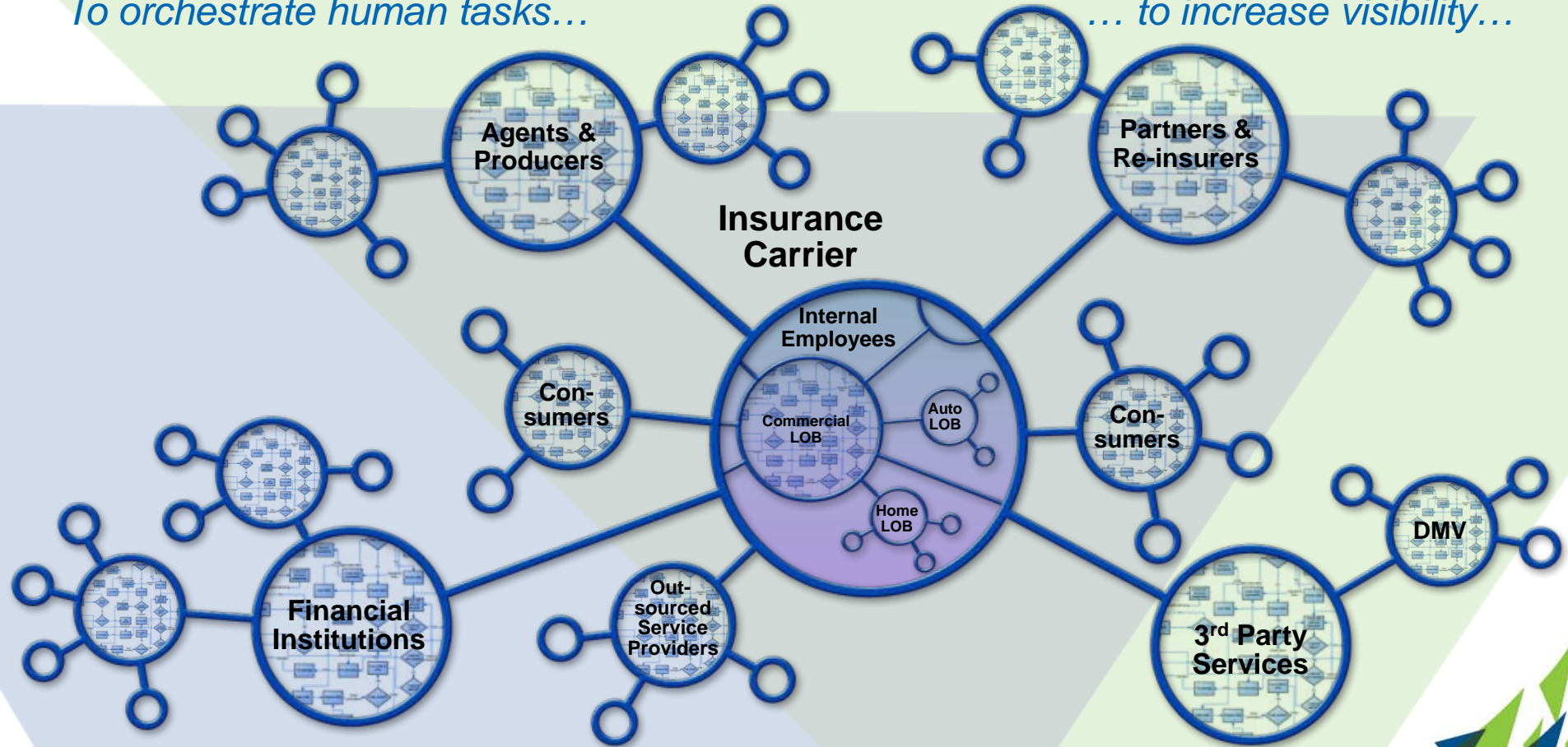
**50 billion**

Devices connected to  
the internet by 2020

....and externally within the broader business network  
*Companies need end-to-end process management*

*To orchestrate human tasks...*

*... to increase visibility...*



*... to manage exceptions and cases...*

*... and for scalable transactions.*

*... everything you need to manage end-to-end business networks*



# Business leaders must drive growth amidst complexity

**Capitalize** on complexity and  
**Outmaneuver** competitors



## Innovation

**81%** believe innovation is key to getting closer to their customers

## New Channels

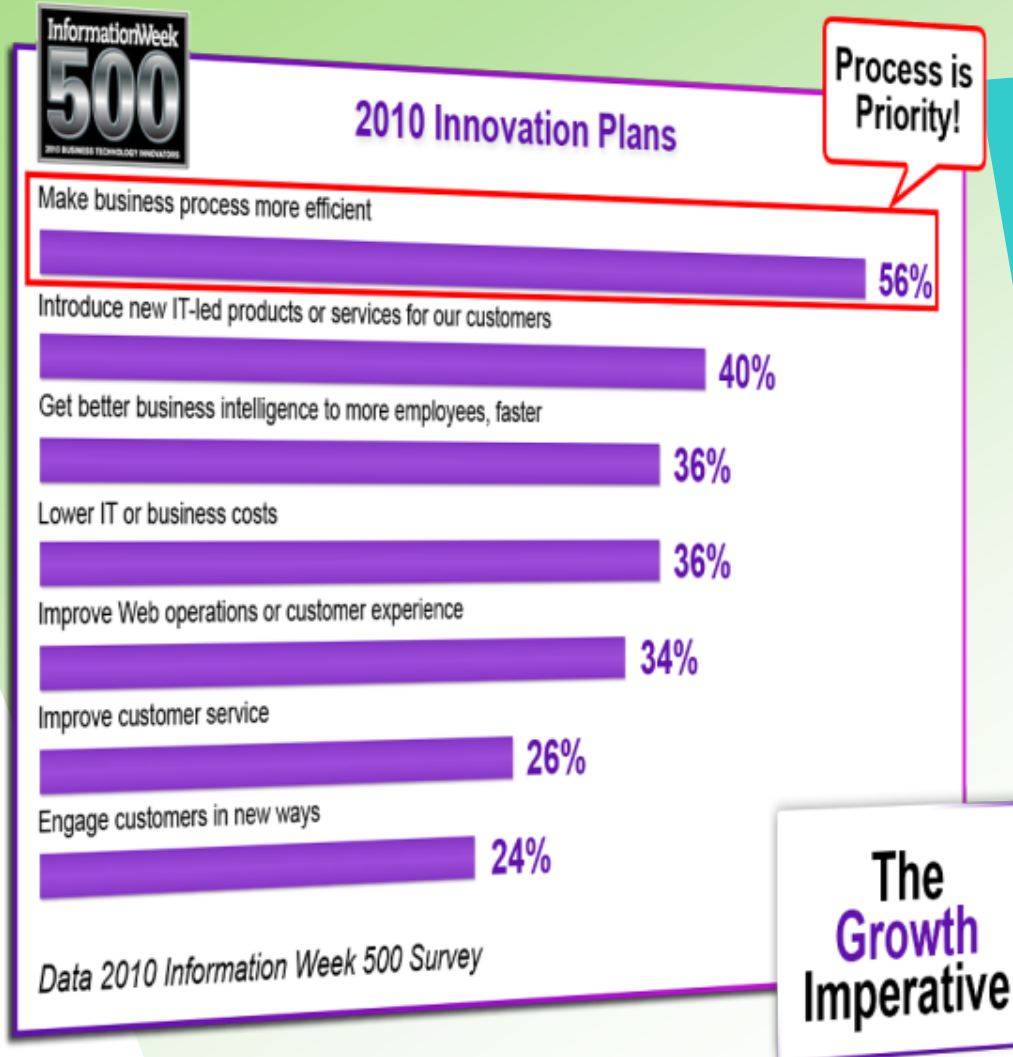
**70%** are focusing on new channels to deliver services to their customers

## Collaboration

**69%** are collaborating with customers to deliver better products and services

Source: IBM CEO Study, 2010

# Business process improvement is #1 priority



## Process optimization drives agility

### Agile Businesses Have:

- **7%** higher EPS growth
- **45%** higher ROI
- **10%** faster revenue growth
- **2.6X** higher return on capital
- **23%** lower valuation volatility than their industry peers

Source: 2010 Convergence Index, BTM Institute



Can you deliver new products and services rapidly?

Can you see what's  
happening across your  
business network?





Can you adapt your processes quickly to changing market conditions?





Can you enable access  
from new devices?

Can you deliver IT  
without boundaries?





Can you connect a smarter planet?

# Agile Business Processes are....



**Explicit:** *Documented, understood & agreed*

**Visible:** *Performance is available in real-time, measurable, and actionable*

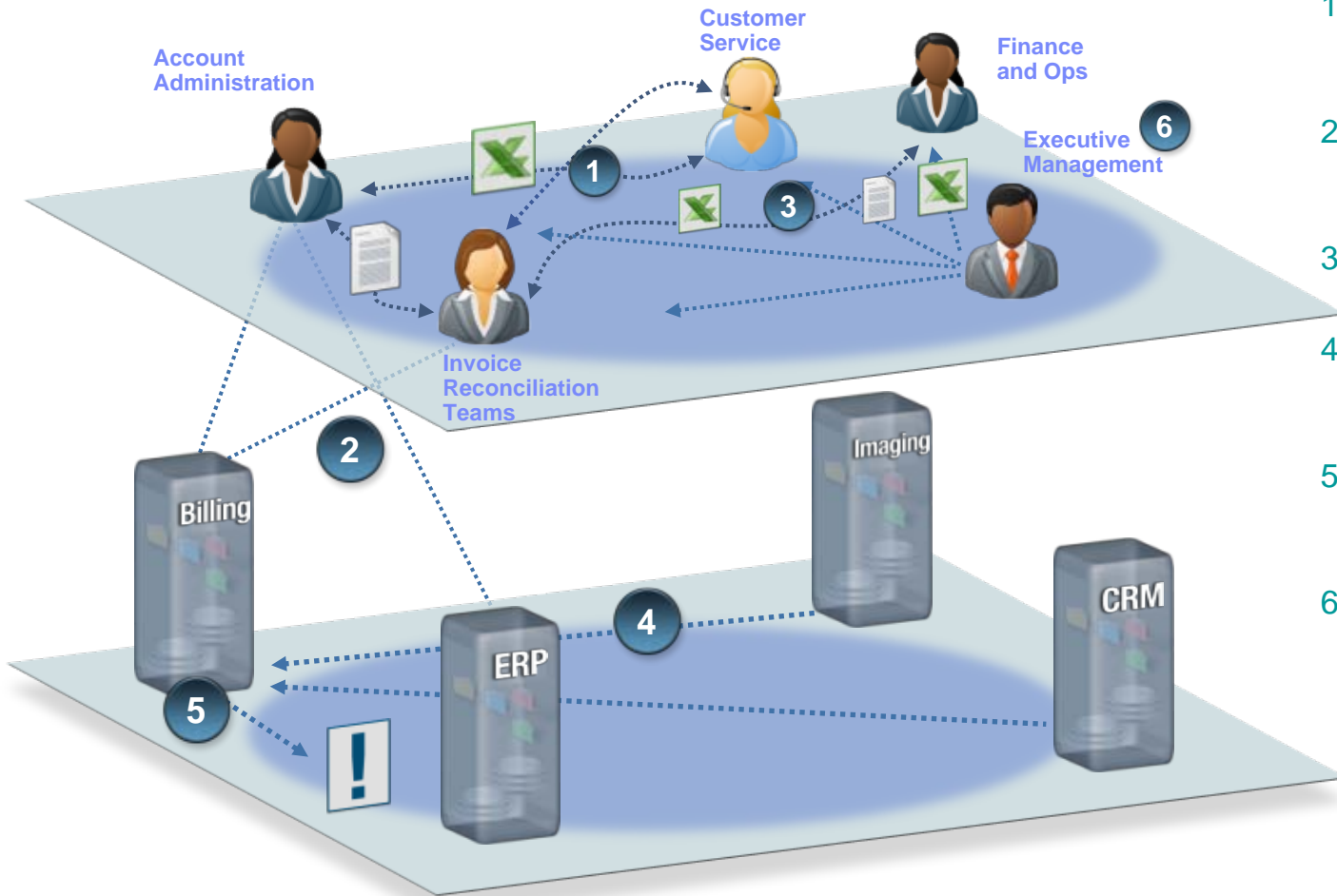
**Interconnected:** *Network-aware and well-connected to the right services at the right time*

**Easily Changed:** *Process tasks, activities, and end-points are flexible and quickly adjusted*

**Driven by the Business:** *Process management is contextual, governed and extended to all stakeholders*

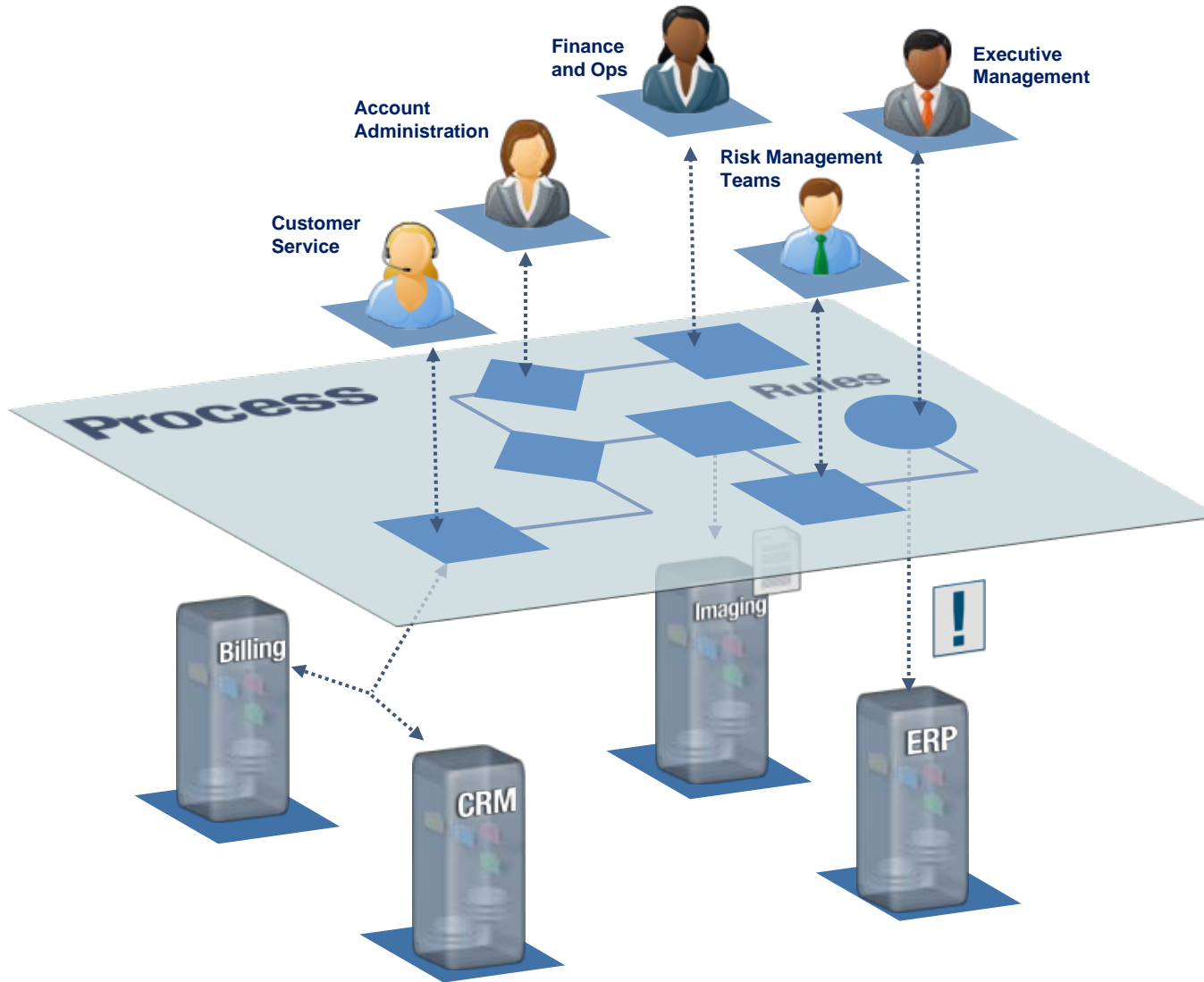


# Typical process problems



1. Unstructured Tasks and Communication (ex Paper or email)
2. Inefficient Working Environment Spans Systems
3. Inconsistent Prioritization
4. Incomplete or Inaccurate Data Flow Between Systems
5. Lack of Control Over System and Business Events (Exceptions)
6. Poor Visibility Into Process Performance

# BPM brings order to the chaos



- 1 Automate workflow & decision making
- 2 Reduce errors and improve consistency
- 3 Standardize resolution across geographies
- 4 Leverage existing systems and data
- 5 Monitor for business events and initiate actions
- 6 Real-time visibility and process control

### Organization Benefits:

- Huge Reduction in Manual Work, Errors
- Faster, More Consistent Issue Resolution
- Easier to Manage the Business
- Consistent Case Handling

# Types of Business Processes



A **business process** is a collection of interrelated **tasks**, which accomplish a particular goal, usually decomposed into several sub-processes.

Automated, Straight Through Processing

(Payments, Trade Settlement)

Coordinated, Scheduled

(Integrated Supply-Chain, Case Management)

Content Intensive

(Paper processes, Account Origination, Claims)



People



Systems



Information

*Structured*

*Unstructured*

## Processes

Compliance

(Automated Records & Process Management)

Non-Deterministic, Event-Driven

(Fraud Detection, Merchandising)

Collaborative, Artful, Ad-hoc

(Contract Negotiation, Collateral Creation)

# BPM: Where are we?



## LOB and IT efforts are separate

*Can we find an easier way to collaborate?*

## Process Optimisation is difficult

*How can we get better visibility?*

## Improvements come one project at a time

*How can we scale up from a project to a program?*

## Rapid change is difficult to manage

*How can we make changes quickly, while maintaining control?*

## Lack leverage between projects

*How can we maximise reuse?*







# A New Solution to a Complex Problem

## *Simplicity*

**Simplifies** operations and **improves** entire experience

**Easy** enough to engage all process participants



## *Power*

**Powerful, dependable** enough for mission critical processes

**Scales smoothly and easily** from initial project to enterprise-wide program

## *Visibility*

Centralises **visibility and control**

Empowers knowledge workers with built-in **real time** analytics to optimise business processes

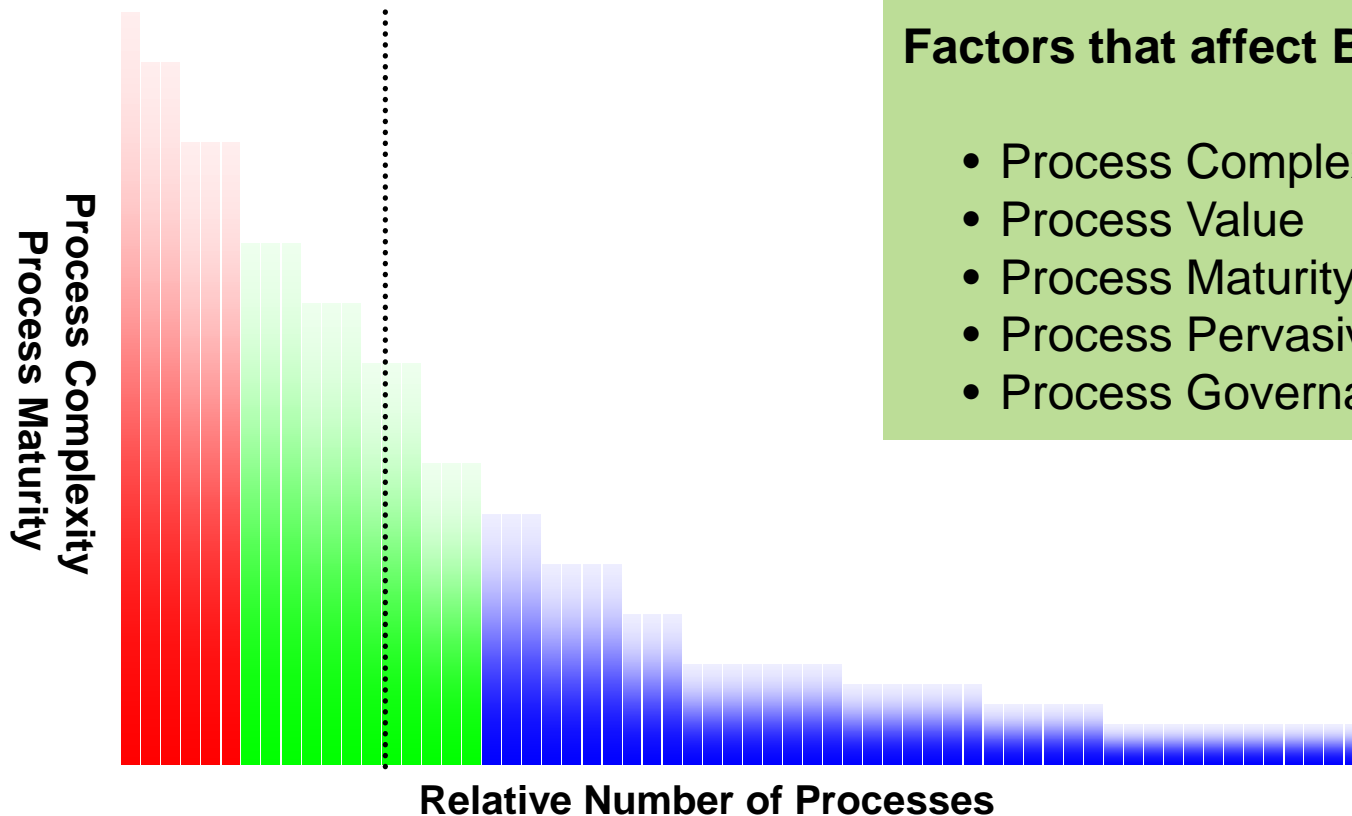
## *Governance*

Achieve **consistency and repeatability** to ensure processes execute as designed

Simplify life-cycle management of process applications **across 1000s of projects**



# Characterizing Processes is Critical for BPM Success



## Factors that affect BPM approach:

- Process Complexity
- Process Value
- Process Maturity
- Process Pervasiveness
- Process Governance

### All processes are not the same:

- Identify the type of processes you are looking to improve.
- Tailor the solution to meet your objectives
- Ensuring success on initial project will lead to further successes

# Golden Rule: Process Improvement Is Everyone's Business



- Stay as **high level** or go as **deep** as you want when it comes to capturing and changing processes
- Built in **update mechanism** for those who need to be kept up to date
- Start by leveraging a comprehensive **template library** of industry best practices in process documentation
- **Take control** over simple processes currently run over email by automating and monitoring them in the cloud



www.blueworkslive.com



# BPM in the Cloud



The screenshot shows a Firefox browser window with the URL <https://www.blueworkslive.com/login>. The page features the BlueworksLive logo at the top left. The main content area is divided into two columns. The left column is titled "Log in to Blueworks Live" and contains a form with fields for "Email Address:" and "Password:". Below the password field is a checkbox labeled "Remember my email address on this computer" and a blue "Log In" button. The right column is titled "Latest News..." and contains three news items, each with a blue circular icon and a link to more information. At the bottom of the page, there are three links: "Don't have an account? Sign up now >>", "Trouble logging in? Find help here >>", and "New to Blueworks Live? Learn More >>". The footer includes the IBM logo and copyright information: "Copyright © 2011 IBM Corporation. All Rights Reserved. Privacy | Security".

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**Latest News...**

- The May release of Blueworks Live is [here](#). Check out how to organize with tags, space stats and more. [#wlive](#)
- The April 11 release of Blueworks Live is [here](#). Check out glossary, playback, automation, and much more [#wlive](#)
- The Jan release of Blueworks Live is now available. See here for more [info](#) [#wlive](#). Happy New Year!
- The Dec release of Blueworks Live is now available. See here for more [info](#) [#wlive](#). Happy Posting & holidays!

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# Blueprinting a Process

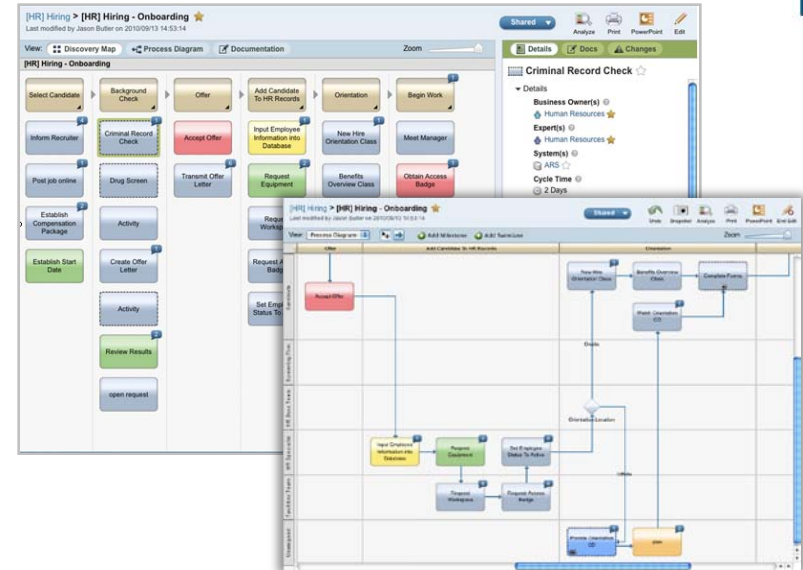


## What It Offers

- Insight into processes
- Evergreen documentation
- Rich template library

## Benefits

- Easy for novices, rich for experts
- Keeps everyone current and engaged
- Participation of Business and IT



**Items I'm Following**

This is the list of all the items you are following. You can add and remove items from the list, as well as view the recent activity for each item.

Processes 4 Projects 3 Activities Values

All Changed

- Account Payable** Recent Changes  
Last modified by Chaz Ripoll on 2009/11/19 14:22:50
- Develop business strategy** Recent Changes  
Last modified by Jasmine Basrai on 2010/09/01 15:09
- Expense Reimbursement**   
Last modified by Jason Butler on 2009/05/28 10:35:48
- Manage change**   
Last modified by KC Williams on 2010/09/01 18:19:42

**Add Comment**

**Jason Butler:** Make sure to consult with the candidate and Manager the date will work.  
2010/09/13 14:53:14 - Reply

All Spaces >  
**Kevin Finn - Sandbox Space** ★ ⓘ  
 Add Tags

- Overview
- Users
- Stats **NEW**

▼ Space Details

Description

This is a Blueworks Live Space

Goals

Goal Description (e.g. Increase process efficiency by 10%) Weight


To demonstrate BlueWorks Live! Medium + -

ACTIVITY STREAM

- Date
- User

+ New Post ☰ ★ 💬

▼ Tue, May 31

 **Maxime Cenatiempo** added a comment to *Fulfill and Activate* milestone in ★ **New Account Opening (FST)** process 3:11 PM









This process looks complete. Let's finish the edit - Reply

▼ Older

-  You imported ★ **New Account Opening (FST)** process template May 26, 2011
-  **Lorenzo Trichardt** made 2 changes to ★ **GE** process May 17, 2011
-  You created ★ **GE** process May 6, 2011

- ▶ Blueprint a Process
- ⚙ Automate a Process
- 📄 Import

Active ▼ **Processes (24)** Name Date Tag

-  **Claims Payment** ✱  
Last modified by Craig Wall on Jun 2, 2011
-  **DEEDI** 1  
Last modified by Chris O'Connor on Dec 13, 2010
-  **Deleteme** ★  
Last modified by kevin finn on Mar 29, 2011
-  **DIIRD - Personal Expense Claim** ▼  
Last modified by kevin finn on Nov 29, 2010
-  **Finance Enquiry** ▼  
Last modified by kevin finn on Dec 15, 2010
-  **First Blueworks Live blueprint process** ▼  
Last modified by kevin finn on Nov 23, 2010
-  **GE** ✱ ★  
Last modified by Lorenzo Trichardt on May 17, 2011
-  **Hiring - Onboarding** ▼

Firefox - IBM Blueworks Live - Kevin Finn - Sandb... +

INTERNATIONAL BUSINESS MAC... (US) https://www.blueworkslive.com/scr/processes/7a3ca964b6#map

IBM A/NZ Intranet Ho... IBM Lotus iNotes Login Administration IBM sites BPM Sites WLE How To BlueWorks Live! IBM BPM

kevin finn - Admin Help Logout

# BlueworksLive

Work Community Library

Kevin Finn - Sandbox Space > New Account Opening (FST) ☆ i

Unshared

Undo Snapshot Analyze Print PowerPoint End Edit

View: Discovery Map + Add Milestone + Add Activity

## Process Outline

### New Account Opening (FST)

- Propose
  - Search for Customer
  - Generate Application Form
  - Select Products
  - Determine Recommended Products
  - Gather Customer Information
  - Establish Customer
    - OFAC Check
    - Generate Risk Score
    - Manual Review
    - Record Customer in AR
    - Reject Customer and Notify
  - Retrieve Full Customer Details
    - Retrieve Customer Profile
    - Retrieve AR Relationship Details
- Verify
  - Evaluate Risk
    - Generate Risk Score
    - Update AR Status to Pending
    - Notify Customer
    - Manual Risk Review
  - Reject New Account
    - Update AR Status to Rejected
    - Notify Customer
  - Fill and Sign

## New Account Opening (FST)

```

graph LR
    subgraph Propose
        P1[Search for Customer]
        P2[Generate Application Form]
        P3[Select Products]
        P4[Determine Recommended Products]
        P5[Gather Customer Information]
        P6[Establish Customer]
        P7[Retrieve Full Customer Details]
    end
    subgraph Verify
        V1[Evaluate Risk]
        V2[Reject New Account]
        V3[Fill and Sign]
    end
    subgraph Fulfill_and_Activate
        F1[Fulfill New Account]
    end
    P1 --> V1
    P2 --> V1
    P3 --> V1
    P4 --> V1
    P5 --> V1
    P6 --> V1
    P7 --> V1
    V1 --> F1
    V2 --> V1
    V3 --> V1
  
```

Propose

Verify

Fulfill and Activate

Search for Customer

Evaluate Risk

Fulfill New Account

Generate Application Form

Reject New Account

Select Products

Fill and Sign

Determine Recommended Products

Apply Policies

Gather Customer Information

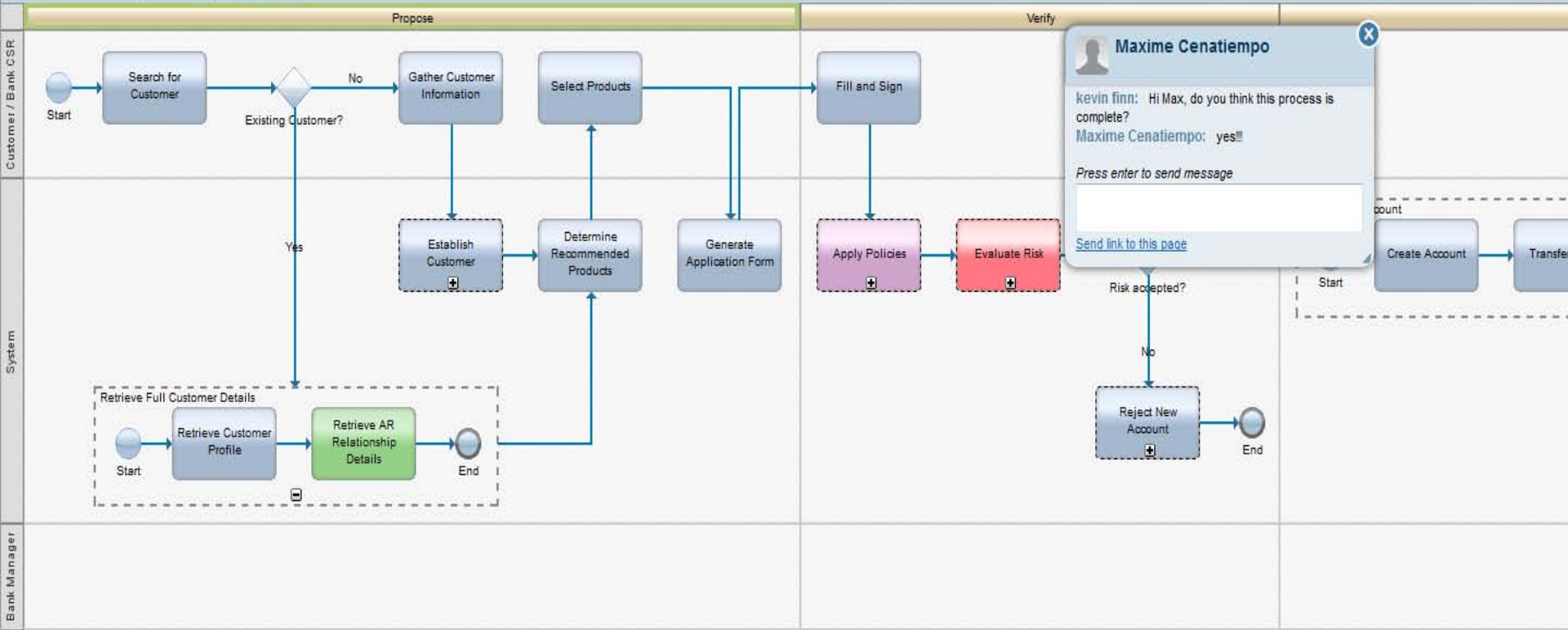
Establish Customer

Retrieve Full Customer Details

Revision History

IBM Terms of Use

Invite New Users



**Maxime Cenatiempo**

kevin finn: Hi Max, do you think this process is complete?  
Maxime Cenatiempo: yes!!!

Press enter to send message

[Send link to this page](#)



Spaces Processes Blogs Templates

Featured (13 Processes)

Parallel Flow with a Simple Split. Flowchart showing a process starting with 'Take customer order', leading to a decision 'Customer orders all 3 items?'. If 'Yes', it goes to 'Prepare fresh files' and 'Prepare shares target'. If 'No', it goes to 'Pay on account'.

Perform revenue accounting. A grid of process steps including: Process customer credit, Invoice customer, Process accounts receivable (AR), Establish credit policy, Maintain customer/credit reader files, Establish AR policy, and Review billing accounts.

Process Blueprint Review. NEW. Workflow Tasks: 1 Subject matter expert review, 2 Update process based on feedback, 3 Final review and approval, 4 Share process with Participants.

Purchase Order Planning. Flowchart showing 'Enter purchase request' leading to 'Check amount', then a decision 'Under budget?'. If 'Yes', it goes to 'Approve'. If 'No', it goes to 'Request'.

Accounting Services. Flowchart showing 'Submit request' leading to 'Add data', then a decision 'New data?'. If 'Yes', it goes to 'Approve'. If 'No', it goes to 'Request'.

Template Library (106 Processes)

All

Accounting Services. Flowchart showing 'Submit request' leading to 'Add data', then a decision 'New data?'. If 'Yes', it goes to 'Approve'. If 'No', it goes to 'Request'.

APQC Classification - Management. Grid of process steps including: Create and manage the Capital, Manage Information Technology, Manage Financials & Risks, and Establish management processes.

APQC Classification - Operating P... Grid of process steps including: Develop Vision and Strategy, Create and manage the core business, and Market and Sell.

Benchmark performance. Grid of process steps including: Conduct performance benchmarking, Create benchmarking register, and Conduct process benchmarking.

Benefits Administration - Ongoing. Flowchart showing 'Establish benefits framework' leading to 'Conduct employee registration'.

Build investor relationships. Grid of process steps including: Plan, build and manage investor relations, and Communicate with stakeholders.

Claims Payment. Flowchart showing 'Check availability of funds' leading to 'Pay claim'.

Create and manage organizations... Grid of process steps including: Create and manage organization, Manage process, and Manage performance.

Define the business concept and ... Grid of process steps including: Assess the external environment, Select/define and define the business model, and Define the business model.

Deliver and support information t... Grid of process steps including: Develop IT services and support delivery strategy, Develop IT support, and Manage IT resources.

Deliver service to customer. Grid of process steps including: Collaborate with customer to understand their needs, Identify and define service, and Deliver service.

Deploy information technology s... Grid of process steps including: Develop IT solution, Plan and manage change, and Plan and manage release.

PRIVATE ACTIVITY STREAM

Date User Process Space

+ New Post Expand All | Collapse All

All Activity

Followed Items

Posts

QUICK LINKS

All Processes

All Spaces

Items I'm Following

My Tasks

POPULAR TAGS

- getting started
- apqc
- bpm
- customer success
- enterprise architecture
- blueprinting
- insurance
- brms
- coe
- telecom
- banking
- bpmn

Today

Maxime Cenatiempo added a comment to *Fulfill and Activate* milestone in **New Account Opening (FST)** process 3:11 PM

This process looks complete. Let's finish the edit - Reply

Thu, May 26

You imported **New Account Opening (FST)** process template into **Kevin Finn - Sandbox Space** space 11:24 AM

Older

Chris O'Connor created a post May 23, 2011

**May Release of Blueworks**  
Although I think the fact that we now have credit card payments enabled for A/NZ customers is the biggest thing of this release, I'd be interested to hear other people's opinions. The enhancement to... [read more](#)

archived invited user *themarse@au1.ibm.com* on your account May 23, 2011

archived invited user *susan.bishop@au1.ibm.com* on your account May 23, 2011

archived invited user *dritchard@au1.ibm.com* on your account May 23, 2011

Lorenzo Trichardt made 2 changes to **GE** process in **Kevin Finn - Sandbox Space** space May 17, 2011

unshared *Test Demo* process in **EDLM** space May 17, 2011

shared *Test Demo* process in **EDLM** space May 17, 2011

Chris O'Connor changed Chris OConnor Participant to be a contributor on your account May 12, 2011

added Blueprint Processes capability to Chris OConnor Participant in **Chris O'Connor Test Area** space May 11, 2011

Chris OConnor Participant added a comment to *Validate* activity in **Claim Processing** process May 11, 2011

I don't understand this process - Reply

Chris O'Connor changed Chris OConnor Participant to be an editor on your account May 11, 2011

Blueprint a Process

Automate a Process

PUBLIC BPM STREAM

Today

**ibmssoftware\_in** RT @invhariharan: WebSphere MQ tracks in IBM Impact 2011 - India: t.co/LFojF1M #ibmimpact #websphereindia 2:55 PM

RT @invhariharan: RT @namasevi: Blog on IMPACT India 2011 here, goo.gl/FjuMu #websphereindia #ibmimpact #impactindia 2:55 PM

**Gartner\_inc** Gov 2.0: It Takes a Crisis to Take Off, Much Less to Stall - Gartner's Andrea Di Maio on his blog bit.ly/lqw6LX #gov20 #opengov 2:43 PM

**yaha\_questetra** RT @imamuragenichi: 【BPM入門動画】『たけお君の業務フロー改善ものがたり』(零細企業に勤める営業マンが「BPM山人」の教えを得ながら業務フローをカイゼンして行くマンガ) youtu.be/mLfjrQnz9Sc #Questetra #sn2011 #BPMN 1:44 PM

**ron\_nakazawa** RT @imamuragenichi: 【BPM入門動画】『たけお君の業務フロー改善ものがたり』(零細企業に勤める営業マンが「BPM山人」の教えを得ながら業務フローをカイゼンして行くマンガ) youtu.be/mLfjrQnz9Sc #Questetra #sn2011 #BPMN 12:28 PM

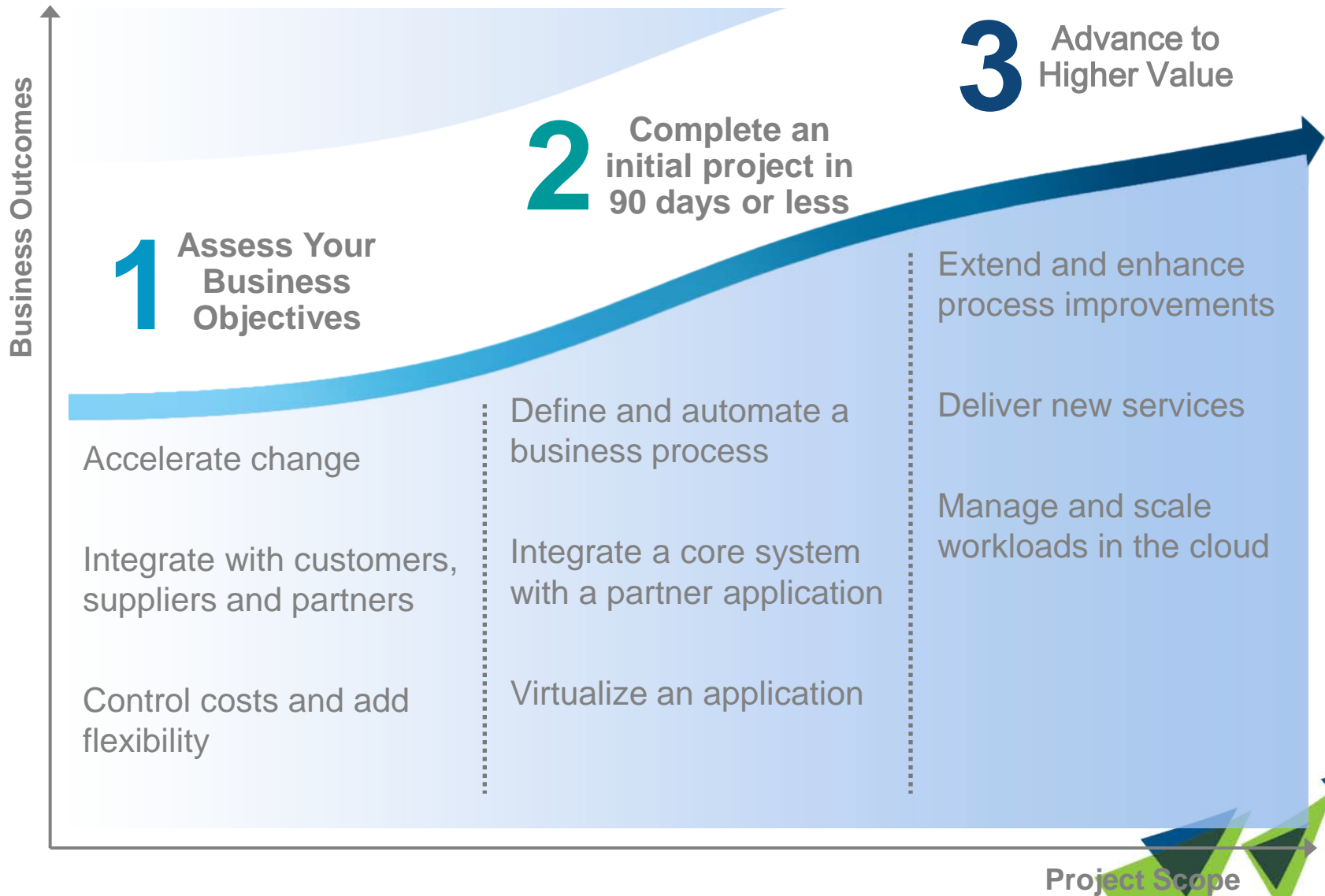
# IBM Offers a Broad Portfolio of Capabilities to Support BPM Adoption

## BPM Adoption Entry Points

- Process discovery and compliance
- Process automation and integration
- Business monitoring
- Decision management
- Advanced case management



# Build Your Roadmap to Business Agility



Get started today



Visit [IBM Blueworks Live](#) to learn more about BPM and capture business designs

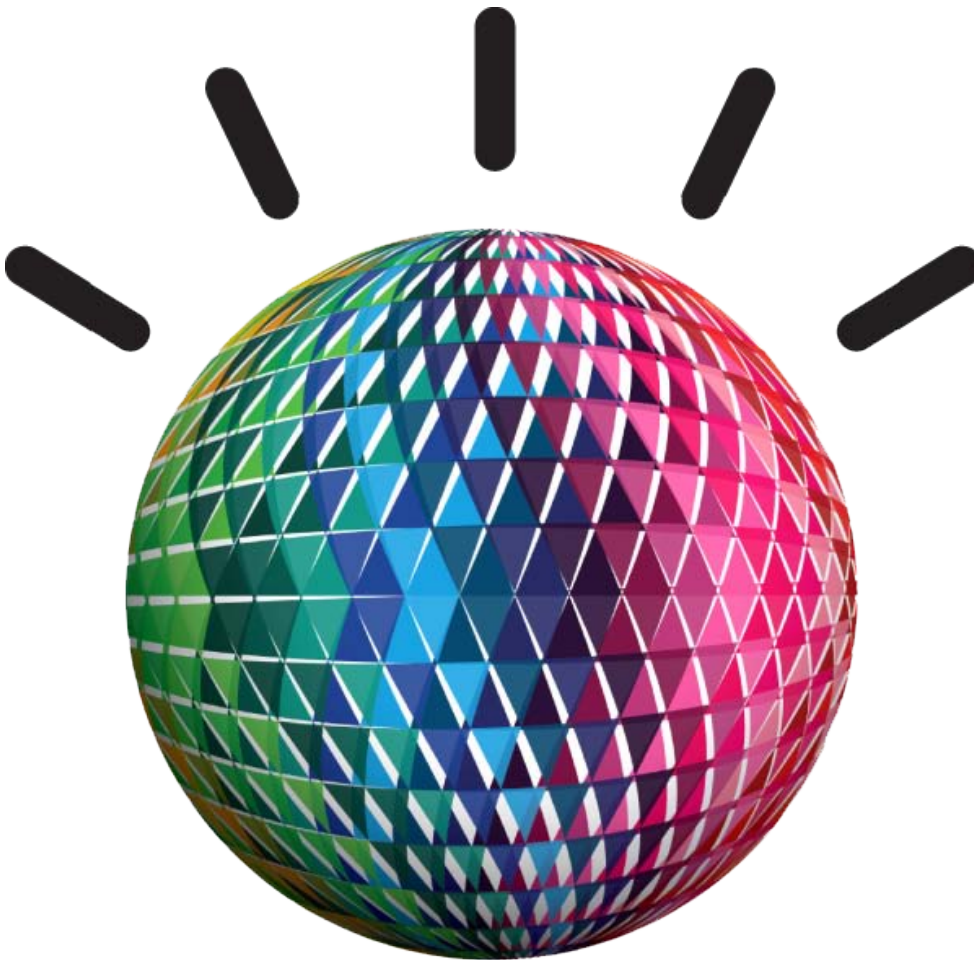
Measure your business agility with the [Business Agility Index](#)

Contact IBM for a [Business Process Improvement Workshop](#)

Ask IBM about a Quick Win Pilot

**[ibm.com/bpm](http://ibm.com/bpm)**





# Transform to Grow with Business Agility





[www.ibm.com/ibm100](http://www.ibm.com/ibm100)

