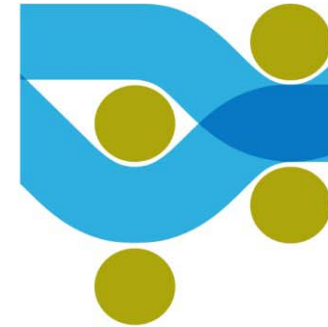


## Smart Decisions for a Smarter Planet

LEARN NEW IDEAS TO STAY AHEAD  
OF THE MARKET!



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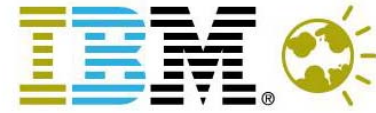
Human Productivity Improvement -  
The single biggest return on investment of  
Business Process Management

# Agenda

- Perspective in relation to IBM Global CIO Study 2009.
- Selecting the right IBM BPM solutions
- Scene setting on BPM and Processes including business examples
- Lombardi WebSphere Blueprint – screen shot demo.
- Lombardi WebSphere Teamworks – screen shot demo
- Working together and applying our ‘Know-How’ in your implementation
- Teamworks, WebSphere Process Server & ILOG – Working Together for Added Value
- Customer Success Stories – How Lombardi Teamworks helps to Improve Human Productivity



# CIO Study 2009 – Swiss Point of View

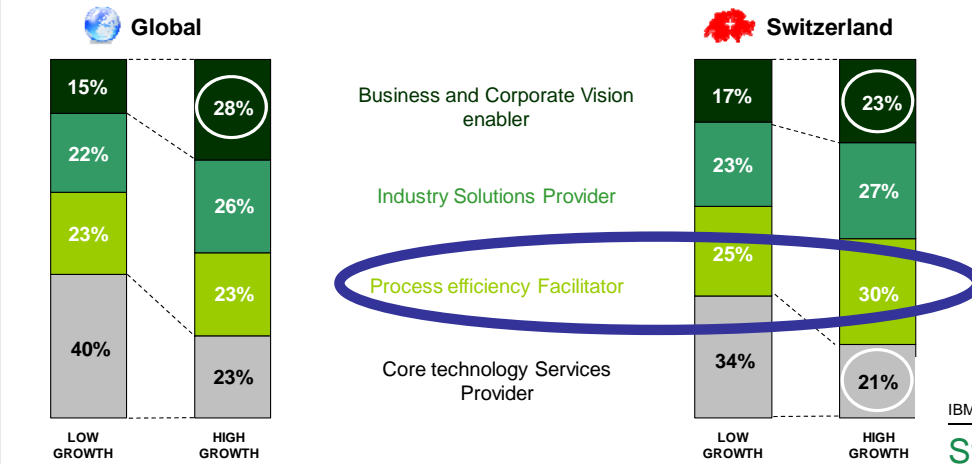


IBM Global CIO Study 2009 – Swiss Point of View



High Growth CIOs are likely to devote more time to enabling the corporate vision instead of being a technology services provider

How does your business look at the role of IT?



IBM Global CIO Study 2009 – Swiss Point of View

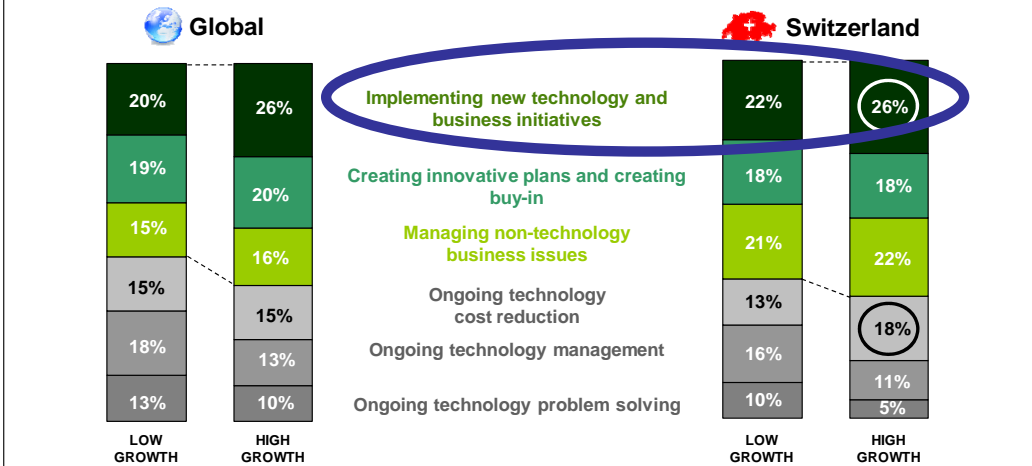


Swiss High Growth CIOs devote some extra time to creating and driving business initiatives but also to saving costs

14

© 2009 IBM

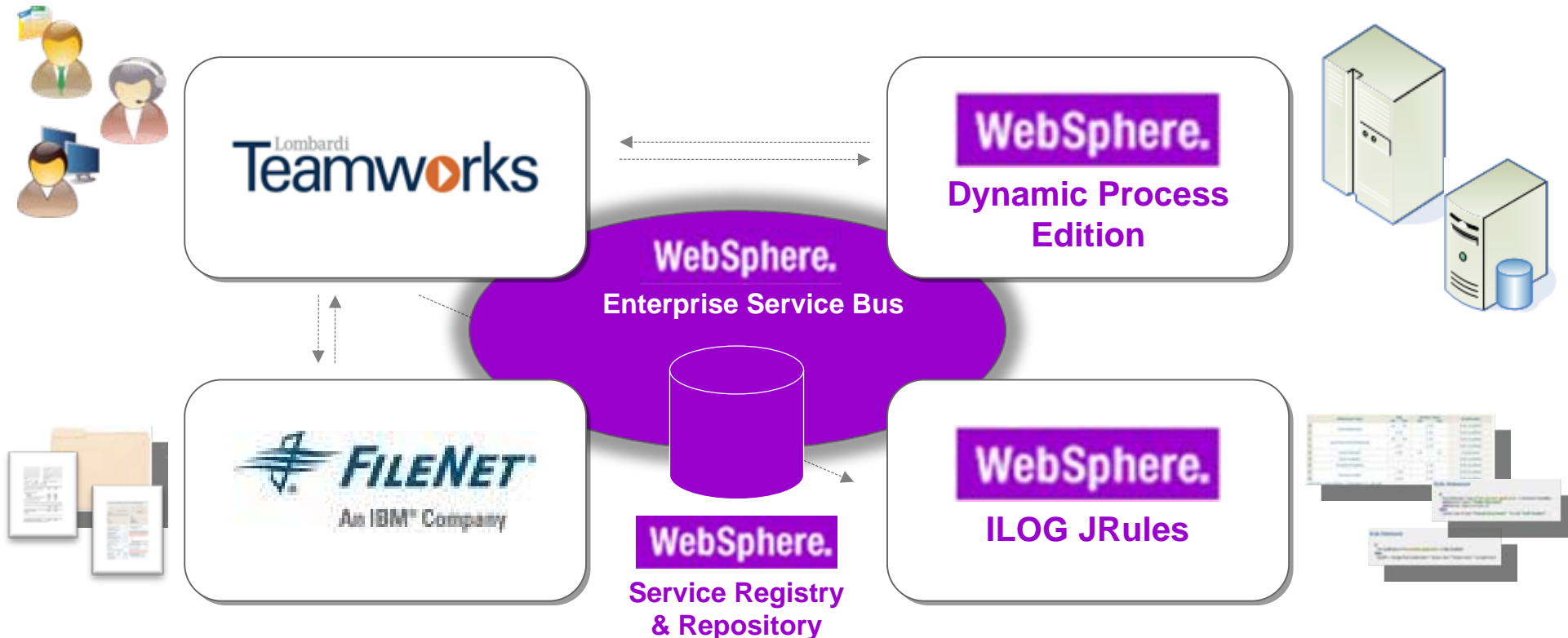
What percentage of your time is dedicated to the following activities?



# The Right Set of Platforms for Managing Your Business

The right platform for **business-led process collaboration and human productivity improvement.**

The right platform for **high-volume automated system integration and orchestration.**



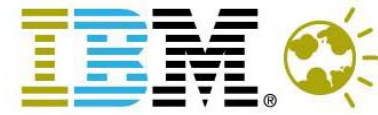
The right platform for **enterprise-wide sharing and management of critical business documents.**

The right platform for **business-led definition and management of strategic business policies and rules.**

... with interactions and management supported by the Service-Oriented Architecture.

## Scene setting.....'BPM'.....&.....'Processes'

- Business process management (BPM) is a management approach focused on aligning all aspects of an organisation with the wants and needs of clients.
- A business process is a collection of related, structured activities or tasks that serve particular goals & deliver results!
- Typically there are three types of business processes:
  - **Management processes**, govern the operation of a system, examples include Corporate Governance and Strategic Management.
  - **Operational processes** constitute the core business and create the primary value stream. examples include Purchasing, Manufacturing, Human Resources, Marketing and Sales.
  - **Supporting processes** support the core processes, examples include Accounting, Recruitment, Technical Support.



## Where do Lombardi WebSphere solutions and services fit?

- **Lombardi** excels at **Improving Human Productivity** in ‘Operational process’ environments, meaning long running, complex flows spanning organisational and system boundaries, characterised by the following examples:

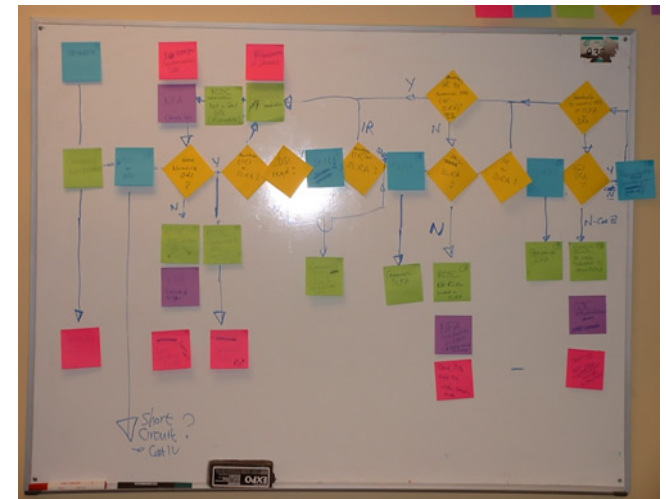


- Organisations typically change processes 4-8 times per year.
- We look for the ‘process pain’ that stop goals being delivered and prevents the value stream from working.

Lombardi  
**Blueprint**

# How is process discovery done today?

- Figure it out yourself?
- Contact or travel to remote parties?
- Lock team in a conference room for day(s)
- Capture and scribe it all down?
- Post-It notes, whiteboards, chart paper?
- Convert it to a diagram/drawing?
- Back and forth till you finally understand your process
- Publish final version....?
- Then.....start again....?

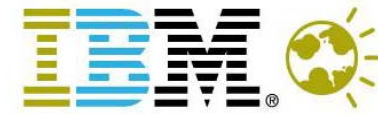






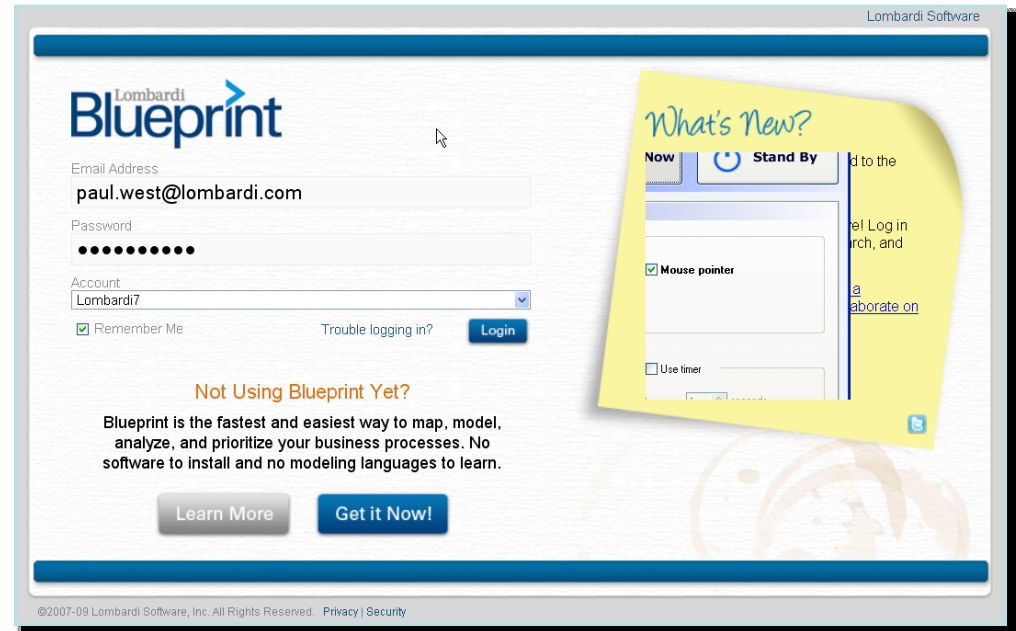
## Setting direction with Blueprint

- A browser based hosted model - no servers, no tools & no knowledge!
- 'SAS 70 certified' - fully secure, highly reliable and scalable
- A single source/repository for process discovery & modelling
- Agile, flexible & real-time multiparty collaboration
- Expose, capture and prioritise processes and problems in 3 different views;
  - Discovery Map, Process Diagram and Documentation
- Easy to import and export info (Visio, Word, PowerPoint, BPMN, WBM and XPD L formats)
- Competitive per user based pricing with 'master' account benefits
- Driving process improvement throughout the organisation...



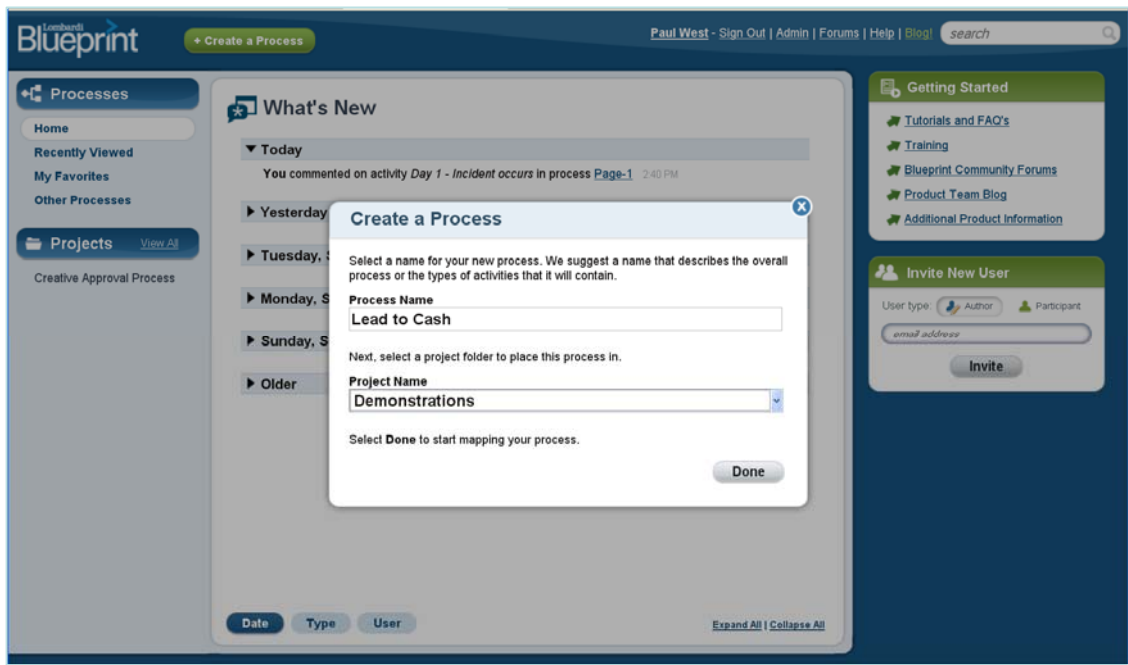
# Blueprint; Process improvement is everybody's business

1<sup>st</sup> 30 seconds.....open your landing page



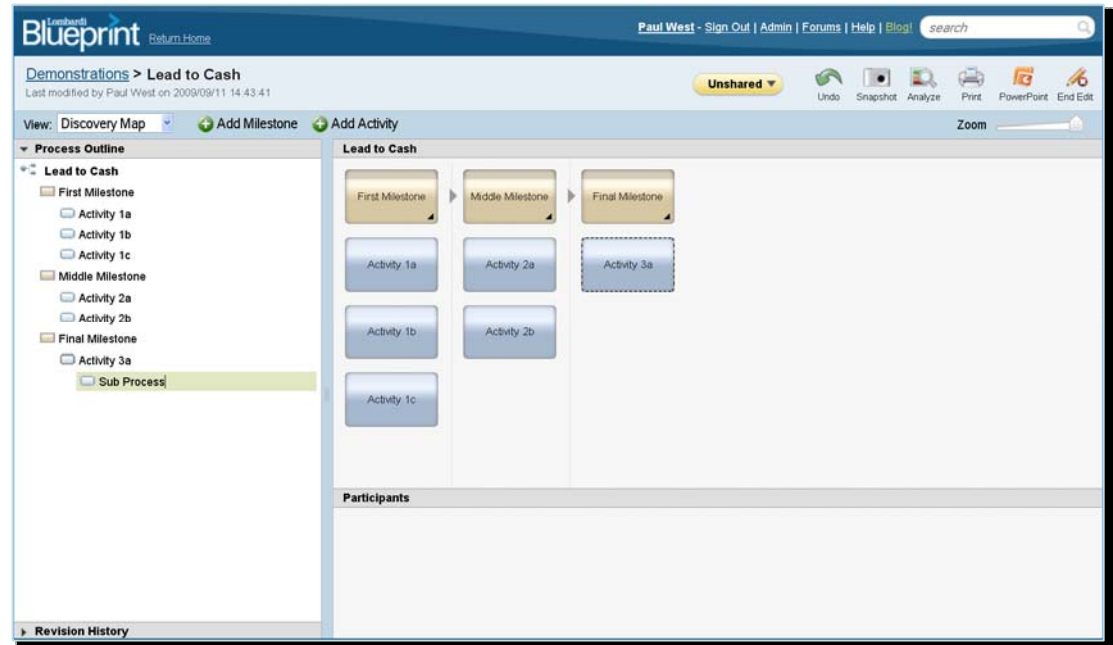
©2007-09 Lombardi Software, Inc. All Rights Reserved. [Privacy](#) | [Security](#)

1<sup>st</sup> minute .....create a project and process name

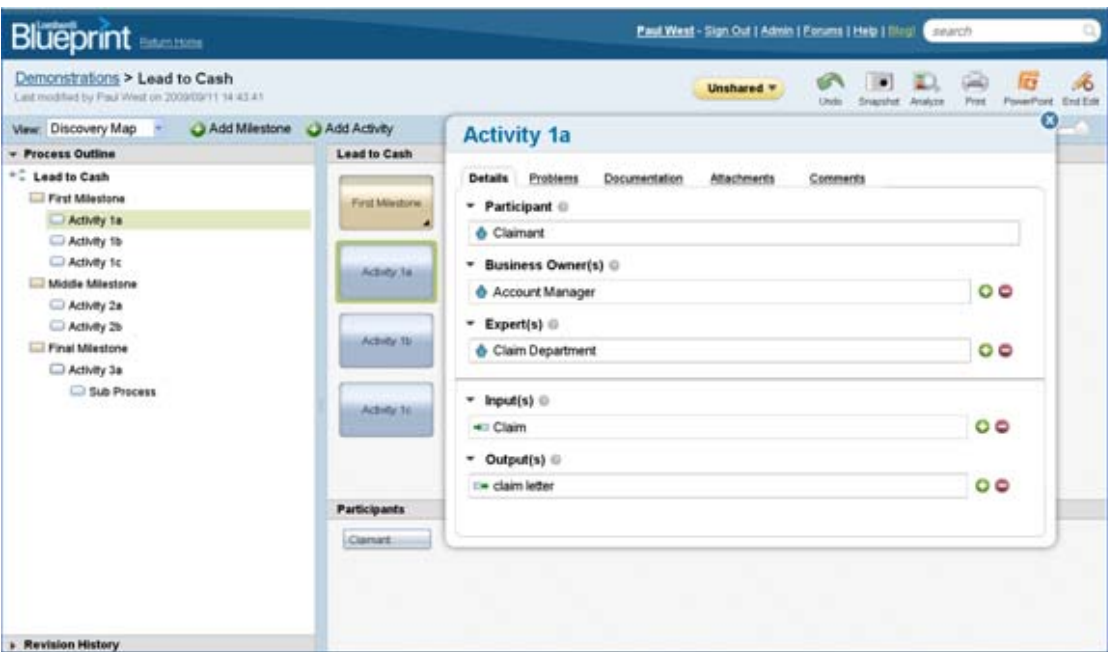


# Blueprint; Process improvement is everybody's business

2<sup>nd</sup> minute.....begin capturing activities, milestones, issues



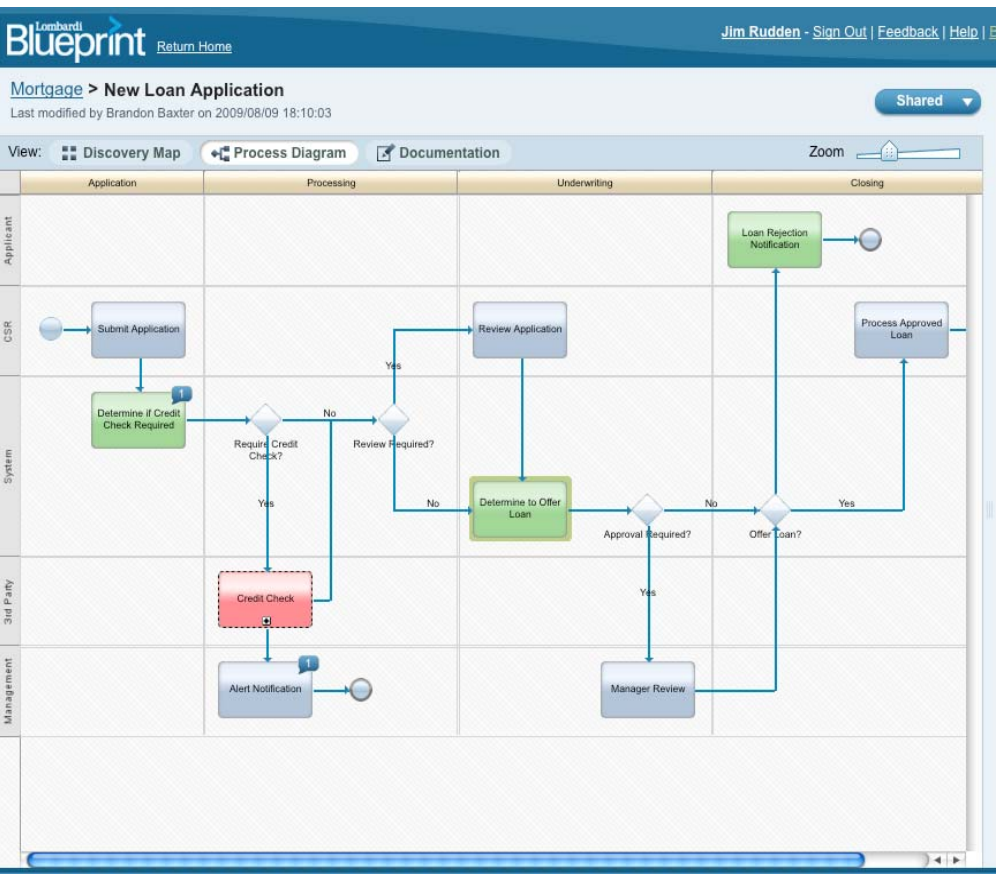
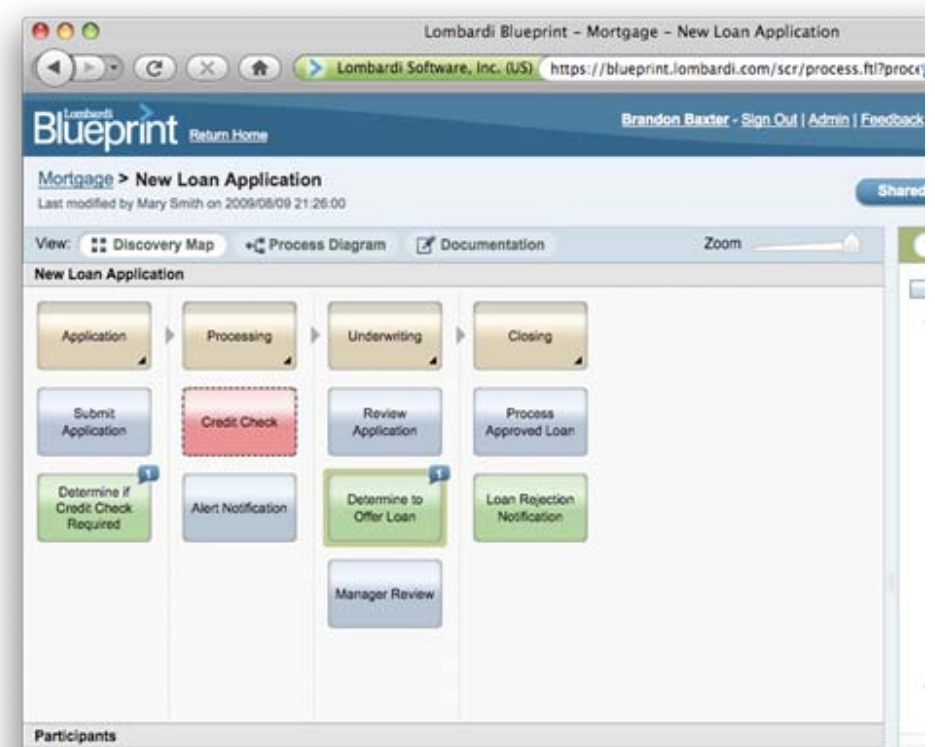
3<sup>rd</sup> – 5<sup>th</sup> minutes.....add more detail, participants, owners, experts and documents





# Blueprint; Process improvement is everybody's business

5<sup>th</sup> – 6<sup>th</sup> minutes....add colleagues & change views – 3 different interpretations of process – all the same and all version consistent



6<sup>th</sup> – 10<sup>th</sup> minutes.....add colleagues, change events, gateways, sequence flows, associations, pools and lanes

# Blueprint; Process improvement is everybody's business

10<sup>th</sup> – 20<sup>th</sup> minutes.....capture more details and analyse process improvement opportunities

Example [HR] Hiring > Exam  
Last modified by Paul West on 2009/09/07 14:53:14

Outputs

- Participants
- Business Owners
- Experts
- Systems
- Cycle Time
- Cost
- Suppliers
- Inputs
- Outputs
- Customers
- Risk
- Value Add
- Problems
- File Attachments

Background Check

You are viewing the Analysis Mode. Click the "X" or Analyze button to return to the process view

Example [HR] Hiring > Example [HR] Hiring - Onboarding  
Last modified by Paul West on 2009/09/07 14:53:14

View: Discovery Map Process Diagram

**Example [HR] Hiring - Onboarding**

Output	# Occurrences
Access Badge	2
Summary Review for Hiring Manager	2
Toxicology Report	2
Accepted Offer	1
Approval of Hiring Manager to hire	1
Approval of Human Resources	1
Background Check Forms	1
Cleared Criminal Record Check	1
Cleared Drug Screen	1
Compensation package	1
Completed Benefits Enrollments Forms	1
Completed Benefits Forms	1

1 Select Candidate → 3 Background Check → 1 Offer → 1 Add Candidate To HR Records → 2 Orientation → Begin Work

1 Inform Recruiter → 2 Criminal Record Check → 1 Create Offer Letter → 1 Input Employee Information into Database → New Hire Orientation Class → Meet Manager

1 Establish Compensation Package → 1 Drug Screen → Transmit Offer Letter → 1 Request Equipment → Benefits Overview Class → 1 Obtain Access Badge

1 Establish Start Date → 1 Review Results → 1 Accept Offer → 1 Request Workspace → 1 Provide Orientation CD → Obtain Equipment

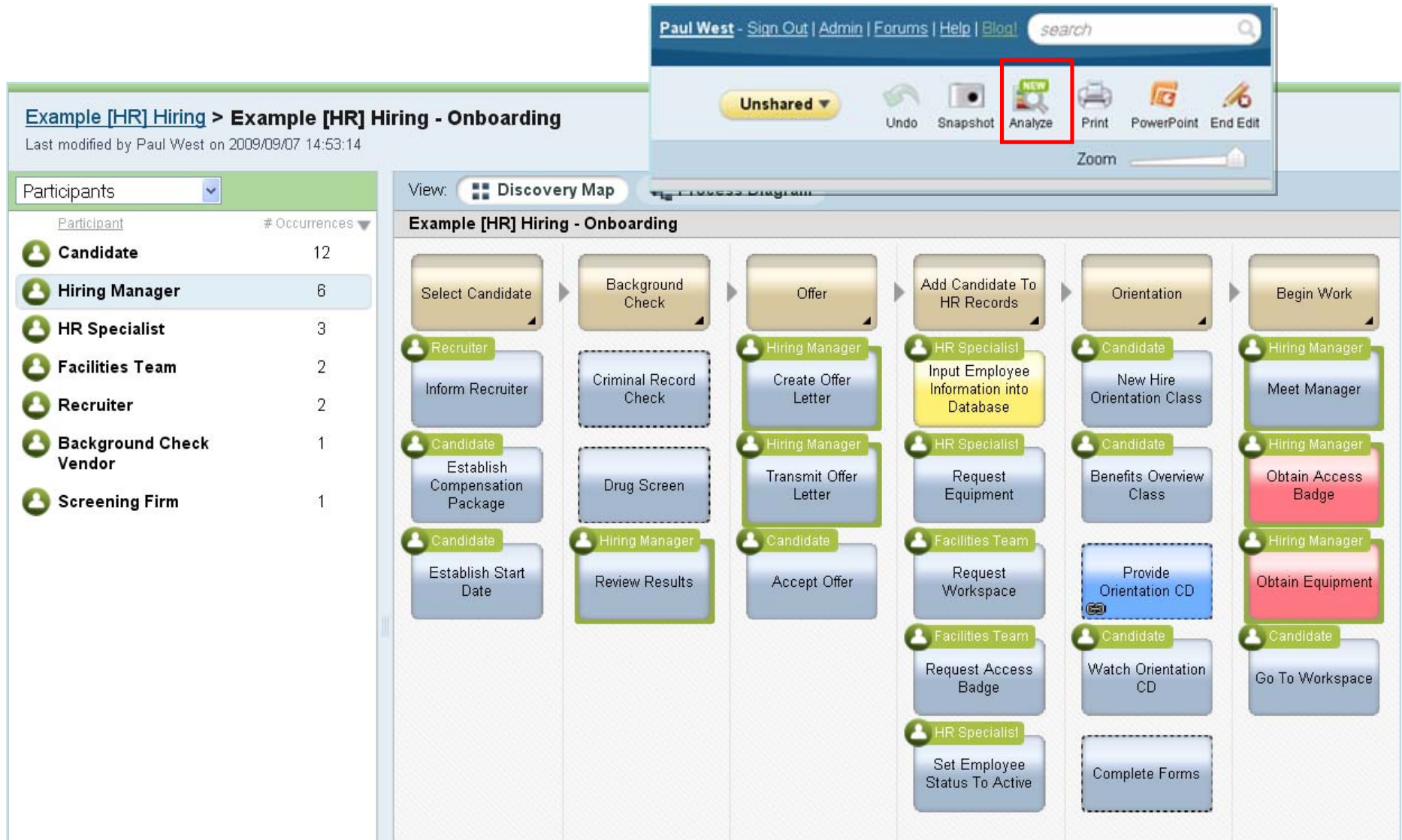
1 Request Access Badge → Watch Orientation CD → Go To Workspace

1 Set Employee Status To Active → 3 Complete Forms



# Blueprint; Process improvement is everybody's business

In less than 30<sup>th</sup> minutes.....you'll have captured the details and analysed process improvement opportunities



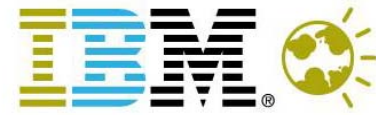
The screenshot displays the IBM Business Process Manager (BPM) interface. At the top, a navigation bar includes the user name 'Paul West' and links for 'Sign Out', 'Admin', 'Forums', 'Help', and 'Blog'. A search bar is also present. Below the navigation bar, a toolbar contains icons for 'Unshared', 'Undo', 'Snapshot', 'Analyze' (highlighted with a red box), 'Print', 'PowerPoint', and 'End Edit'. A 'Zoom' slider is located at the bottom right of the toolbar.

The main content area shows a process map titled 'Example [HR] Hiring - Onboarding'. The process is viewed in 'Discovery Map' mode. The process flow consists of six main steps: 'Select Candidate', 'Background Check', 'Offer', 'Add Candidate To HR Records', 'Orientation', and 'Begin Work'. Each step is represented by a yellow box with a dropdown arrow. Below each step, there are smaller boxes representing tasks, each associated with a participant role. The participants are listed in a sidebar on the left:

- Candidate: 12 occurrences
- Hiring Manager: 6 occurrences
- HR Specialist: 3 occurrences
- Facilities Team: 2 occurrences
- Recruiter: 2 occurrences
- Background Check Vendor: 1 occurrence
- Screening Firm: 1 occurrence

The tasks for each step are as follows:

- Select Candidate:** Inform Recruiter (Recruiter), Establish Compensation Package (Candidate), Establish Start Date (Candidate).
- Background Check:** Criminal Record Check (dashed box), Drug Screen (dashed box), Review Results (Hiring Manager).
- Offer:** Create Offer Letter (Hiring Manager), Transmit Offer Letter (Hiring Manager), Accept Offer (Candidate).
- Add Candidate To HR Records:** Input Employee Information into Database (HR Specialist), Request Equipment (HR Specialist), Request Workspace (Facilities Team), Request Access Badge (Facilities Team), Set Employee Status To Active (HR Specialist).
- Orientation:** New Hire Orientation Class (Candidate), Benefits Overview Class (Candidate), Provide Orientation CD (dashed box, Candidate), Watch Orientation CD (Candidate), Complete Forms (dashed box).
- Begin Work:** Meet Manager (Hiring Manager), Obtain Access Badge (Hiring Manager), Obtain Equipment (Hiring Manager), Go To Workspace (Candidate).



## Blueprint; Process improvement is everybody's business

Next steps?.....export to IBM WebSphere Process Modeller or export to Lombardi WebSphere Teamworks for process improvement programmes





**Blueprint is well-suited to ‘practical people’ who are focused on solving process problems.**



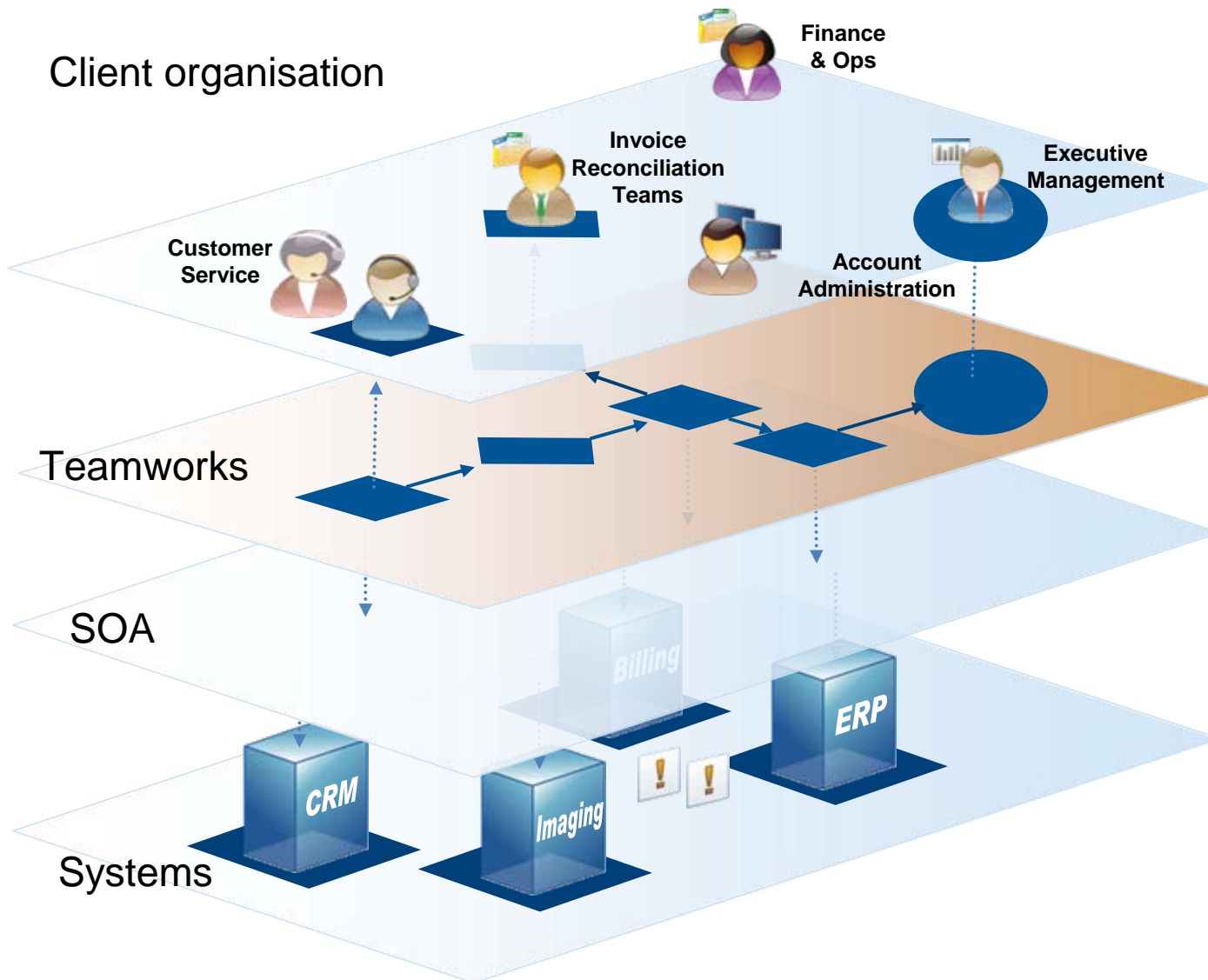
**Michael van den Brandt - Director Group Operations & SOKE Project,  
Mondial Assistance Group**

March 2009



Lombardi  
**Teamworks**

# Where does Lombardi WebSphere Teamworks fit?



**A Business Environment**  
Teamworks provides a business-facing operational layer that increases productivity. **The right users are given the right information at the right time, all through a unified interface.**

**Providing Visibility**  
Teamworks tracks the KPIs and exposes key metrics to stakeholders and management. Areas in need of optimisation are readily identified.

**With High Leverage**  
Leverage existing investments in systems and services in the IT landscape.

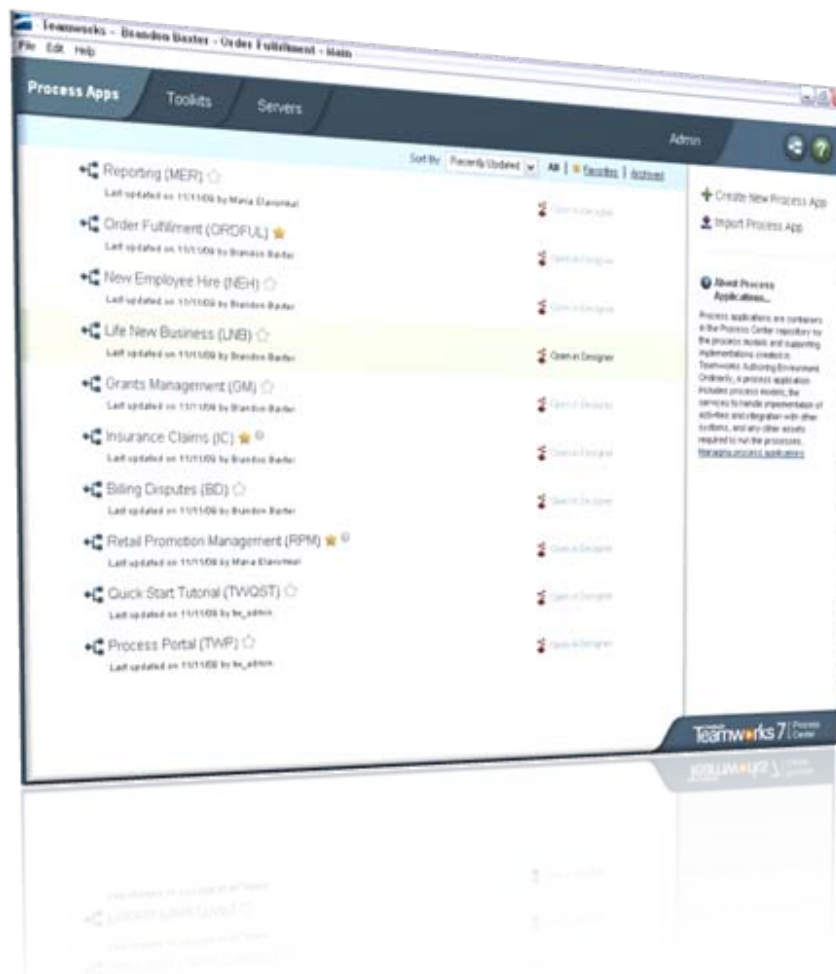
# Lombardi WebSphere Teamworks – Unique Benefits



- **Runtime executable** process improvement platform – imports ‘**Blueprinted**’ processes
- **Shared Model Architecture** – instead of lots of different tools and repositories shared architecture means you build everything – diagrams, forms, rules, and services – in just one place!
- **Coaches** – teach, step and ‘coach’ users through the process, presenting consistent, dynamic and relevant data to specific and variable user communities
- **Playbacks** – ability to run a business process application anytime to make sure you capture the true business needs



# Lombardi WebSphere Teamworks – Unique Benefits



- **Toolkits** – process applications and common components facilitate reuse.
- **Optimiser** – allows you to visualise historical performance so you can easily identify ways in which to improve your business processes
- **Consistent and Scalable management** – 100's of authors, 1,000's thousands of processes & 10,000's of assets are all 'harmonised' with an 'IT Governance Wrapper'
- **Ease of Integration** - built-in support for defining adapters to external applications and for exposing process applications as web services.

# Traditional Process Application Lifecycle

(Ex. Typical stack vendors)

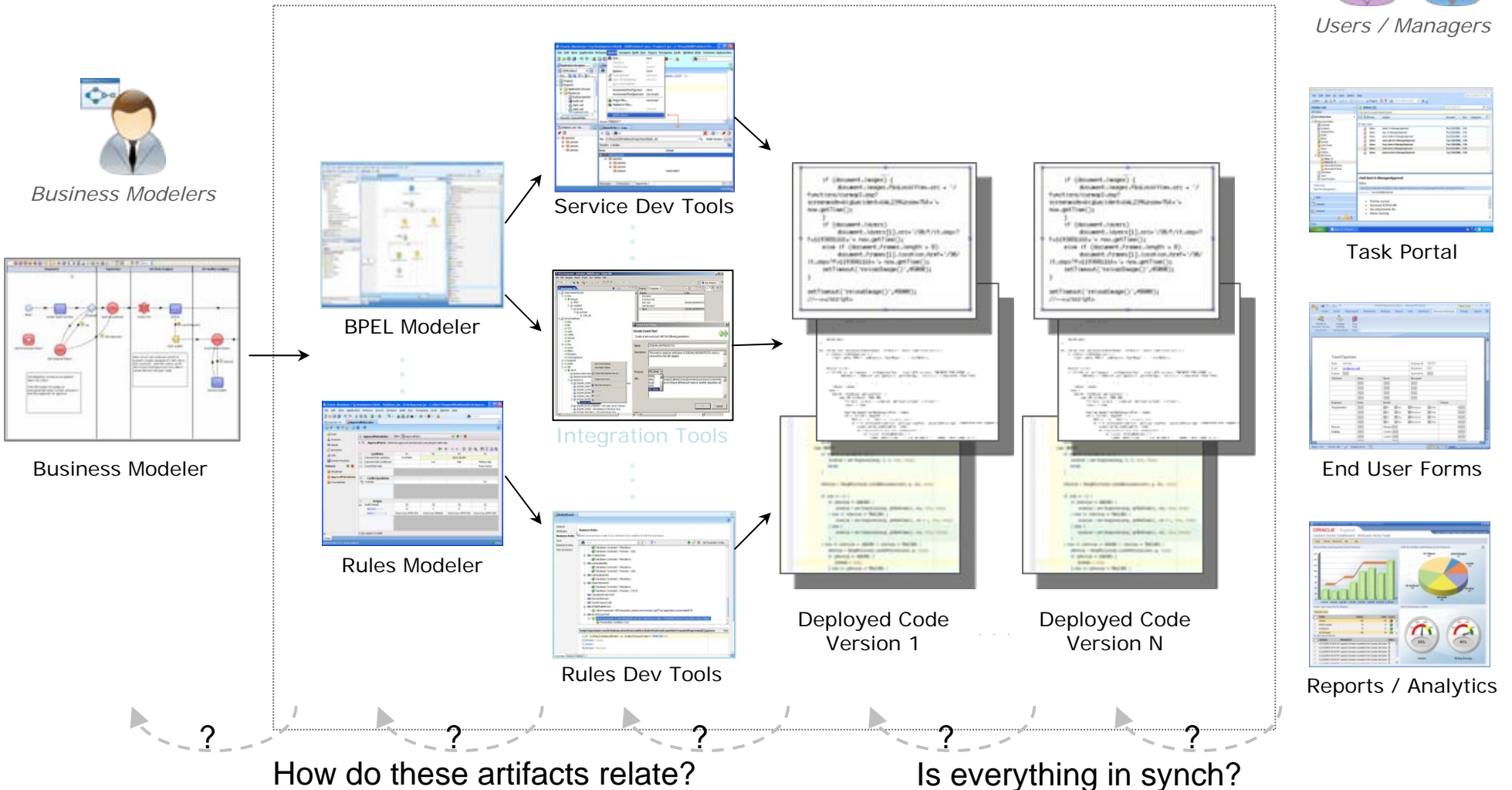
Java Developers



Technical Experts

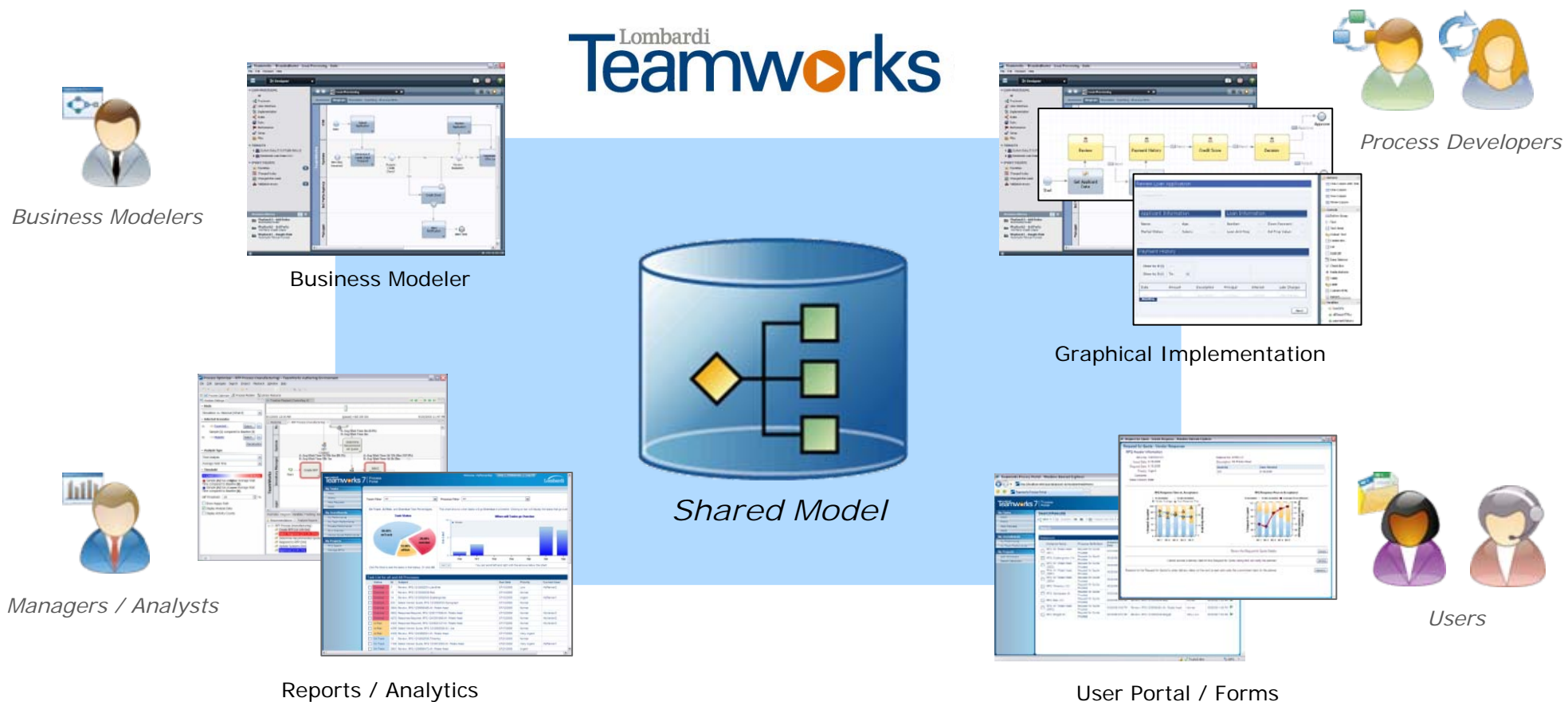


Users / Managers





# The Lombardi Difference: 'Shared Model' Architecture



- Single integrated platform – everything you need in one product
- Single shared process model – assets are always in synch
- Lower technical effort – less development time, cost, risk
- Repeatable & iterative development cycle
- What you model is what is executed
- Decrease maintenance workload
- More consistent execution



# Lombardi WebSphere Teamworks – Unique Benefits

## Process improvement portal

Teamworks Process Portal - Mozilla Firefox

File Edit View Go Bookmarks Tools Help

http://msmith2:8081/portal/jsp/viewScoreboard.do?id=1078

Getting Started Latest Headlines

Welcome, insMgr1 Help | Preferences | Log Off

**Lombardi**

**My Tasks**

- Inbox
- History
- Help Requests
- Alerts

**My ScoreBoards**

- My Performance
- My Team Performance
- Process Performance
- SLA Overview
- Life Policy Performance
- Life Product Dashboard

**Process Tools**

- Manage EPVs

**PM My Team Performance**

Team Filter: All Process Filter: All

**On Track, At Risk, and Overdue Task Percentages.**

Click Pie Slice to see the tasks in that status. Or click All.

**When will Tasks go Overdue**

This chart shows when tasks will go Overdue in a timeline. Clicking on bar will display the tasks that go overdue on that day.

You can scroll left and right with the arrows below the chart

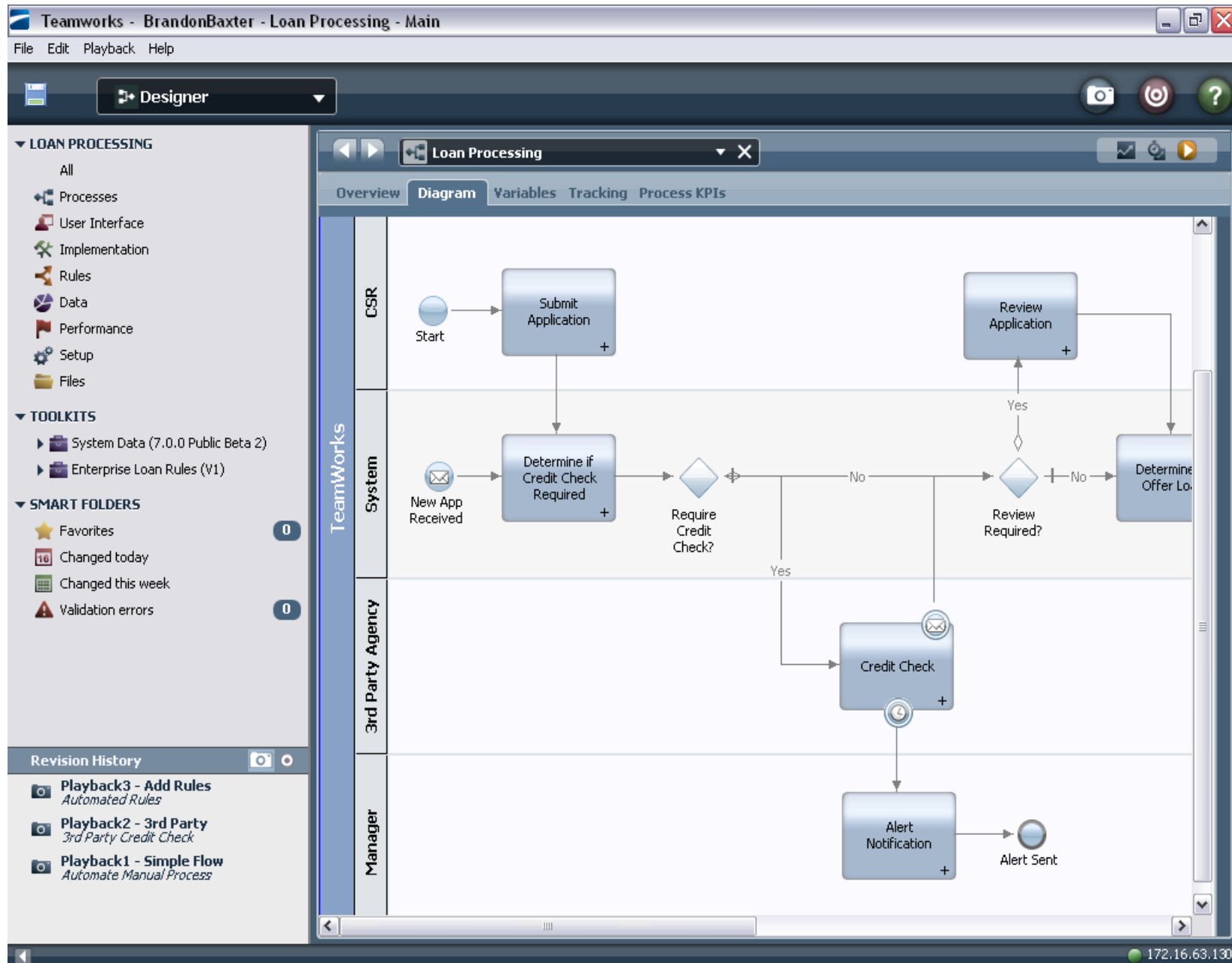
**Task List for all and All Processes**

Status	Id	Subject	Due Date	Priority	Current User	Team
<input type="checkbox"/> Overdue	176	Medical Requirement	07/22/2007	Normal	insMedical1	
<input checked="" type="checkbox"/> At Risk	177	Credit Requirement	08/18/2007	Normal	insCredit1	
<input checked="" type="checkbox"/> At Risk	187	Step: Review Policy (HomeR)	08/18/2007	Normal		insUnderwriters
<input checked="" type="checkbox"/> At Risk	188	Step: Review Policy (HomeN)	08/18/2007	Normal		insUnderwriters
<input type="checkbox"/> At Risk	190	Step: Add and Review Requirements	08/18/2007	Normal	insUnderwriter2	insUnderwriters
<input type="checkbox"/> At Risk	201	Task: Escalate Research	09/01/2007	Normal		insPartnerMgrs
<input type="checkbox"/> At Risk	251	Task: Complete Application	08/19/2007	Normal	insAgent1	
<input type="checkbox"/> At Risk	2052	Step: Add and Review Requirements	08/19/2007	Normal	insUnderwriter1	insUnderwriters
<input type="checkbox"/> On Track	182	Step: Renewal Review	08/18/2007	Normal	insUnderwriter2	insUnderwriters
<input type="checkbox"/> On Track	184	Step: Renewal Review	08/18/2007	Normal		insUnderwriters

Done

# Lombardi WebSphere Teamworks – Unique Benefits

## ‘The Picture IS the Process’



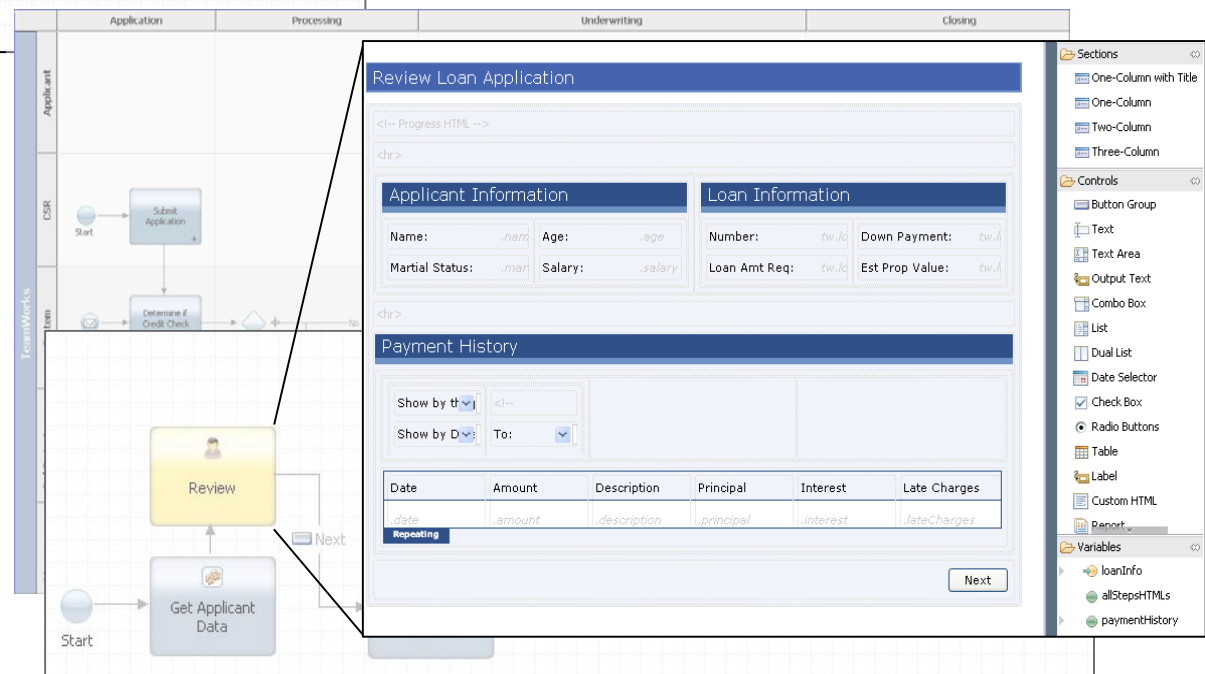


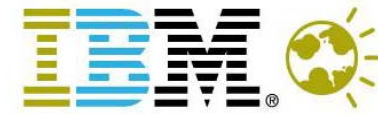
# Lombardi WebSphere Teamworks – Unique Benefits

- Build graphically, not by developing code
- Engage business users in process design and change

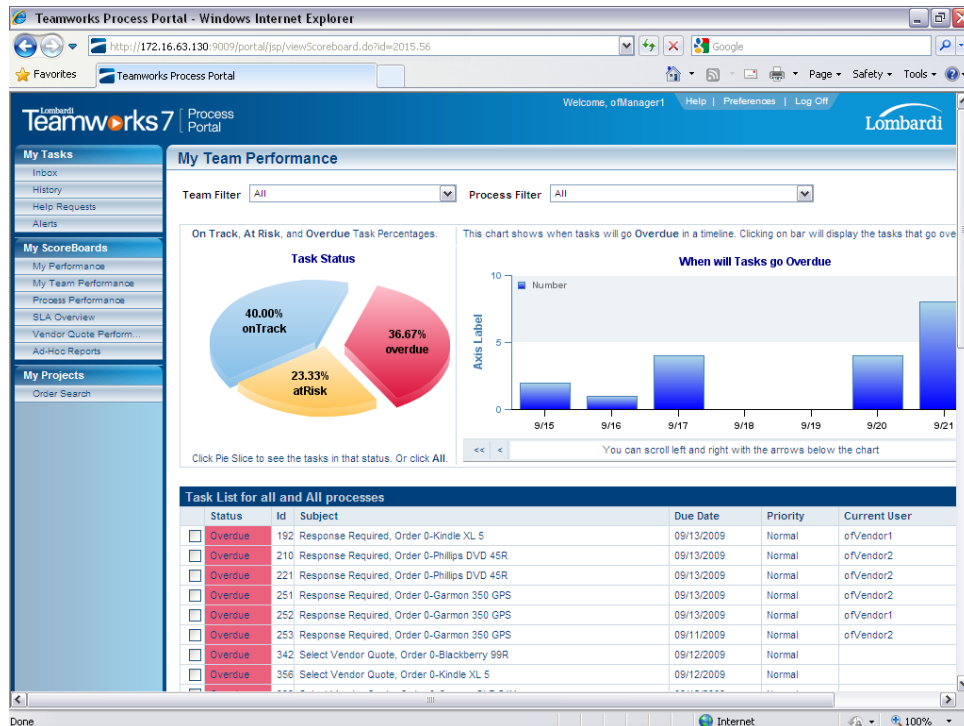


- Improve process efficiency with customisable 'coaches'



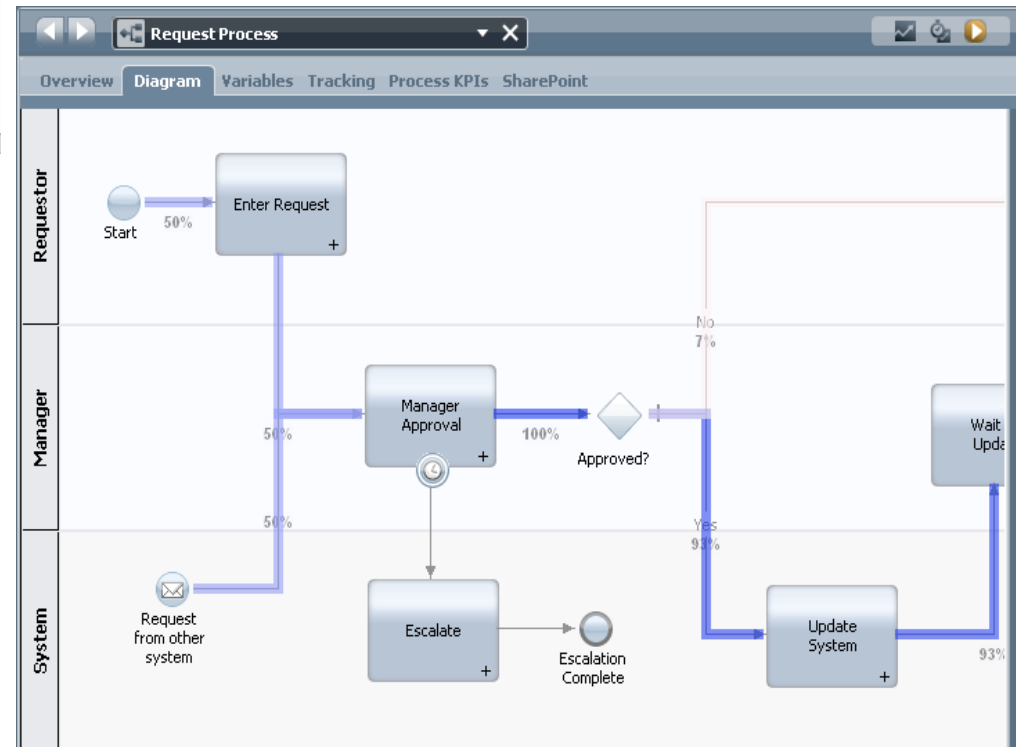


# Lombardi WebSphere Teamworks – Unique Benefits



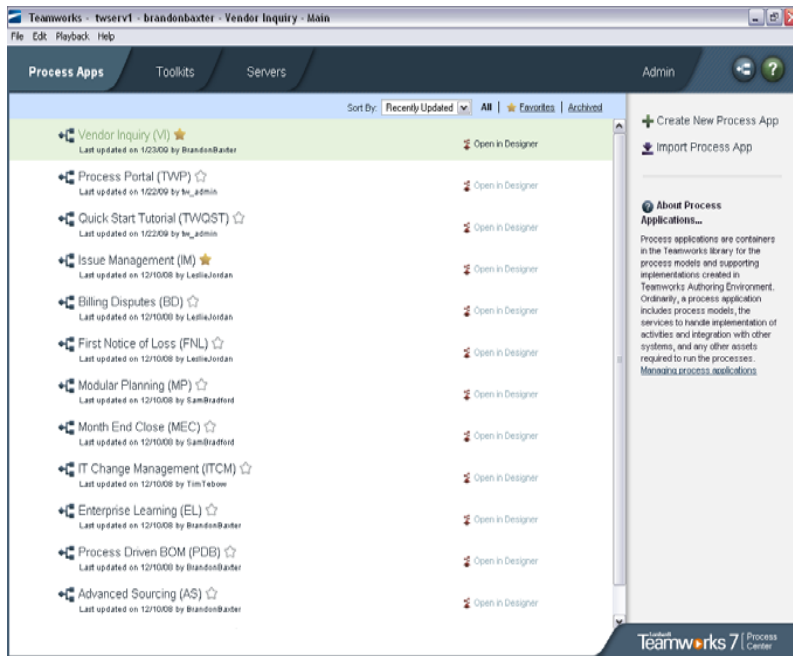
- Visibility - as important as automation

- Process improvement designed in



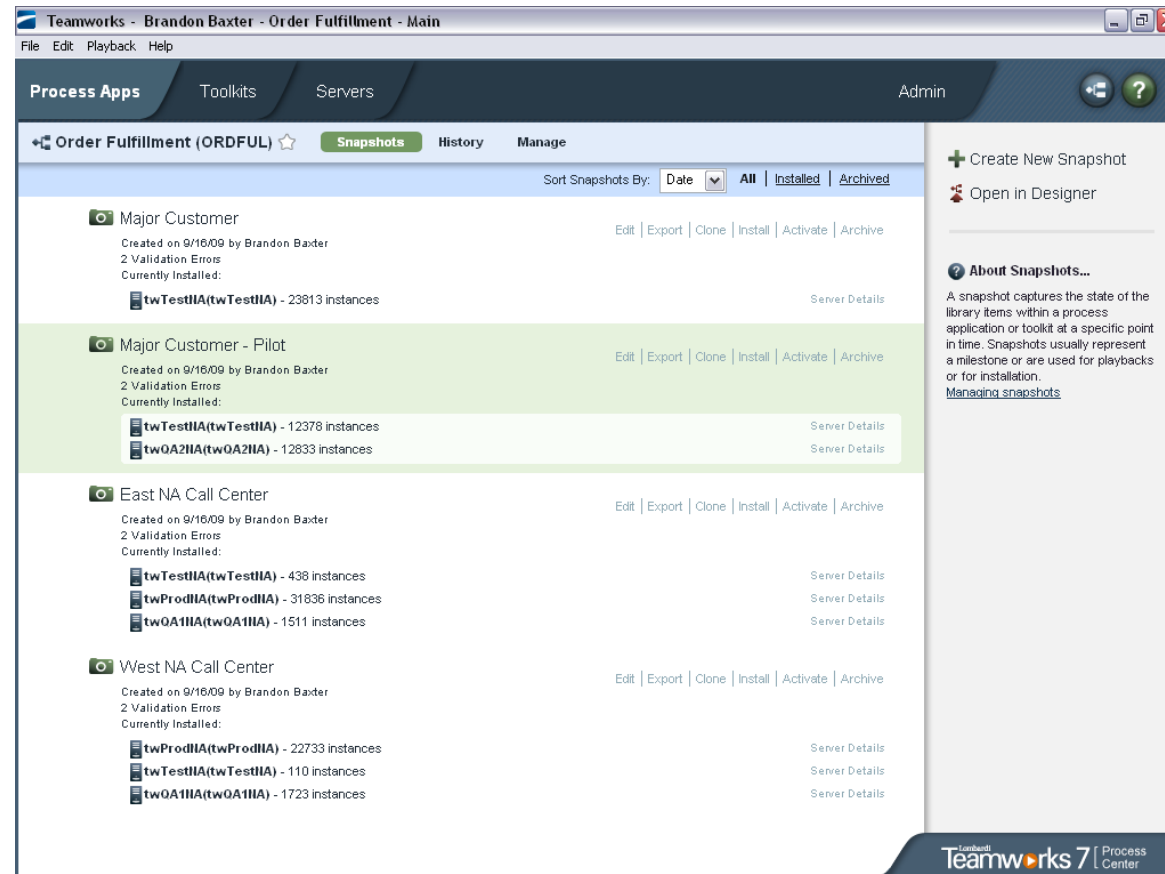
# Lombardi WebSphere Teamworks – Unique Benefits

- Incremental process initiatives and frequency of change requires new management capabilities



The screenshot shows the 'Process Apps' section of the Teamworks interface. It features a list of process applications with their names, last update dates, and the user who updated them. Each application has an 'Open in Designer' button. The applications listed are:

Process Application	Last updated on	Updated by
Vendor Inquiry (VI)	12/23/09	Brandon Baxter
Process Portal (TWP)	10/22/09	tw_admin
Quick Start Tutorial (TWGST)	12/23/09	tw_admin
Issue Management (IM)	12/10/08	Leslie Jordan
Billing Disputes (BD)	12/10/08	Leslie Jordan
First Notice of Loss (FNL)	12/10/08	Leslie Jordan
Modular Planning (MP)	12/10/08	Sam Bradford
Month End Close (MEC)	12/10/08	Sam Bradford
IT Change Management (ITCM)	12/10/08	Tim Tebow
Enterprise Learning (EL)	12/10/08	Brandon Baxter
Process Driven BOM (PDB)	12/10/08	Brandon Baxter
Advanced Sourcing (AS)	12/10/08	Brandon Baxter



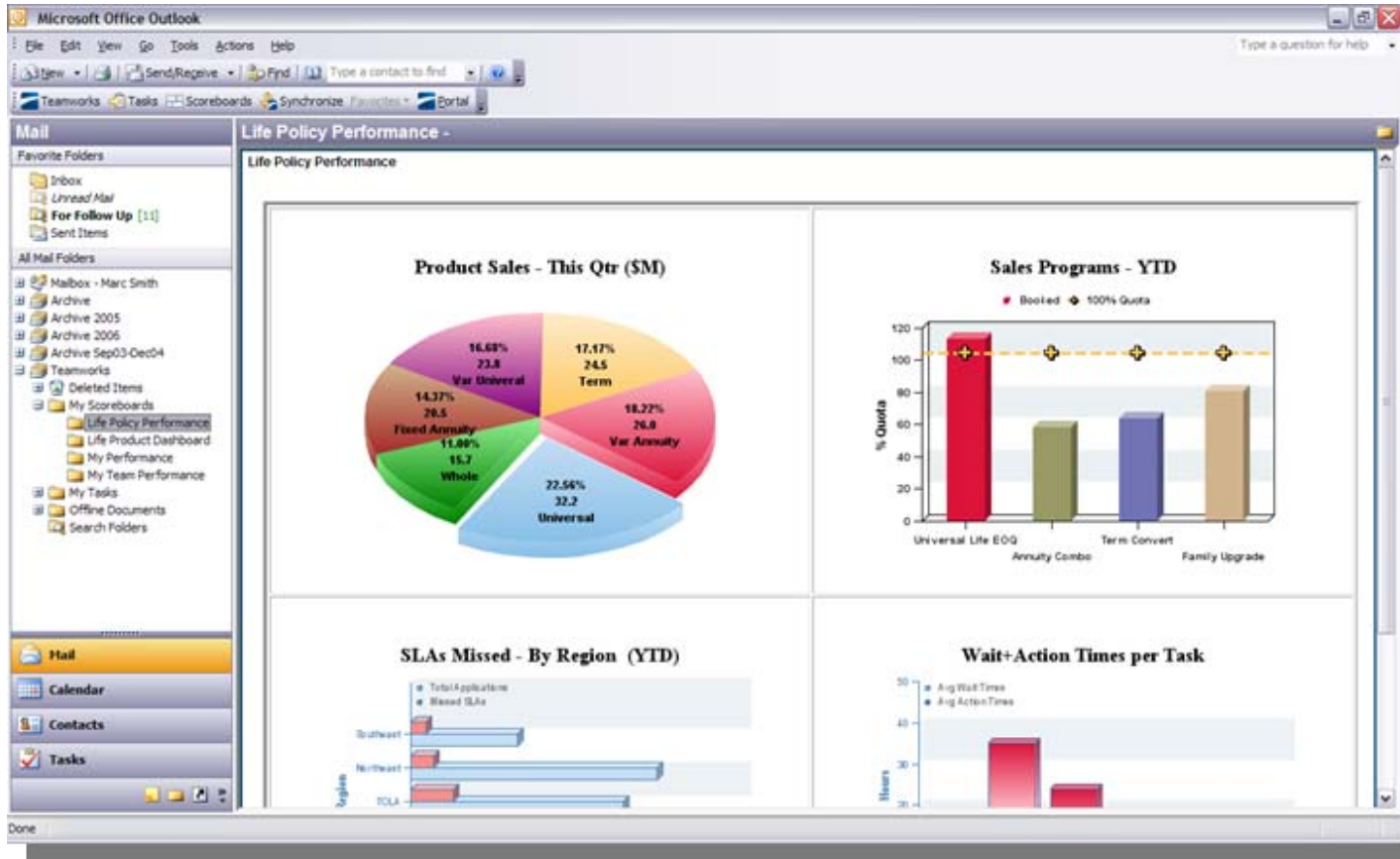
The screenshot shows the 'Snapshots' view for the 'Order Fulfillment (ORDFUL)' process application. It displays a list of snapshots with their creation dates, validation errors, and currently installed instances. Each snapshot has a 'Server Details' link. The snapshots listed are:

Snapshot Name	Created on	Created by	Validation Errors	Currently Installed
Major Customer	9/16/09	Brandon Baxter	2	twTest1A(twTest1A) - 23813 instances
Major Customer - Pilot	9/16/09	Brandon Baxter	2	twTest1A(twTest1A) - 12378 instances tw0A21A(tw0A21A) - 12833 instances
East NA Call Center	9/16/09	Brandon Baxter	2	twTest1A(twTest1A) - 438 instances twProd1A(twProd1A) - 31836 instances tw0A11A(tw0A11A) - 1511 instances
West NA Call Center	9/16/09	Brandon Baxter	2	twProd1A(twProd1A) - 22733 instances twTest1A(twTest1A) - 110 instances tw0A11A(tw0A11A) - 1723 instances



# Lombardi WebSphere Teamworks – Unique Benefits

## Management of processes provided to business users

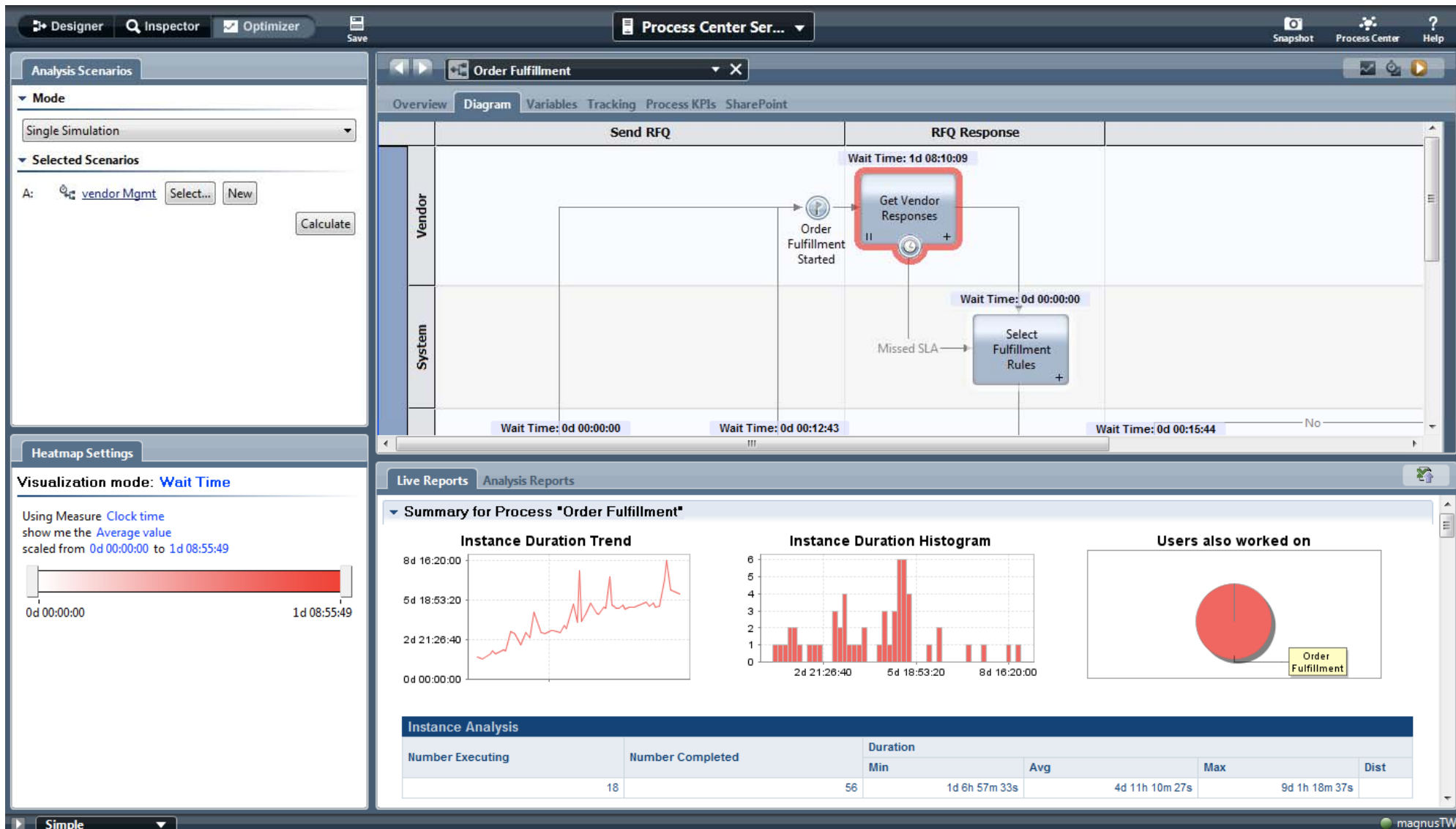


- User base interacts with software in new ways – information at your fingertips, pushed instead of pulled
- Improves awareness and adoption



# Lombardi WebSphere Teamworks – Unique Benefits

Use process data to improve and optimise your business – \* CIO Study



The screenshot displays the IBM Business Process Manager (BPM) interface, specifically the 'Process Center' for 'Order Fulfillment'. The interface is divided into several sections:

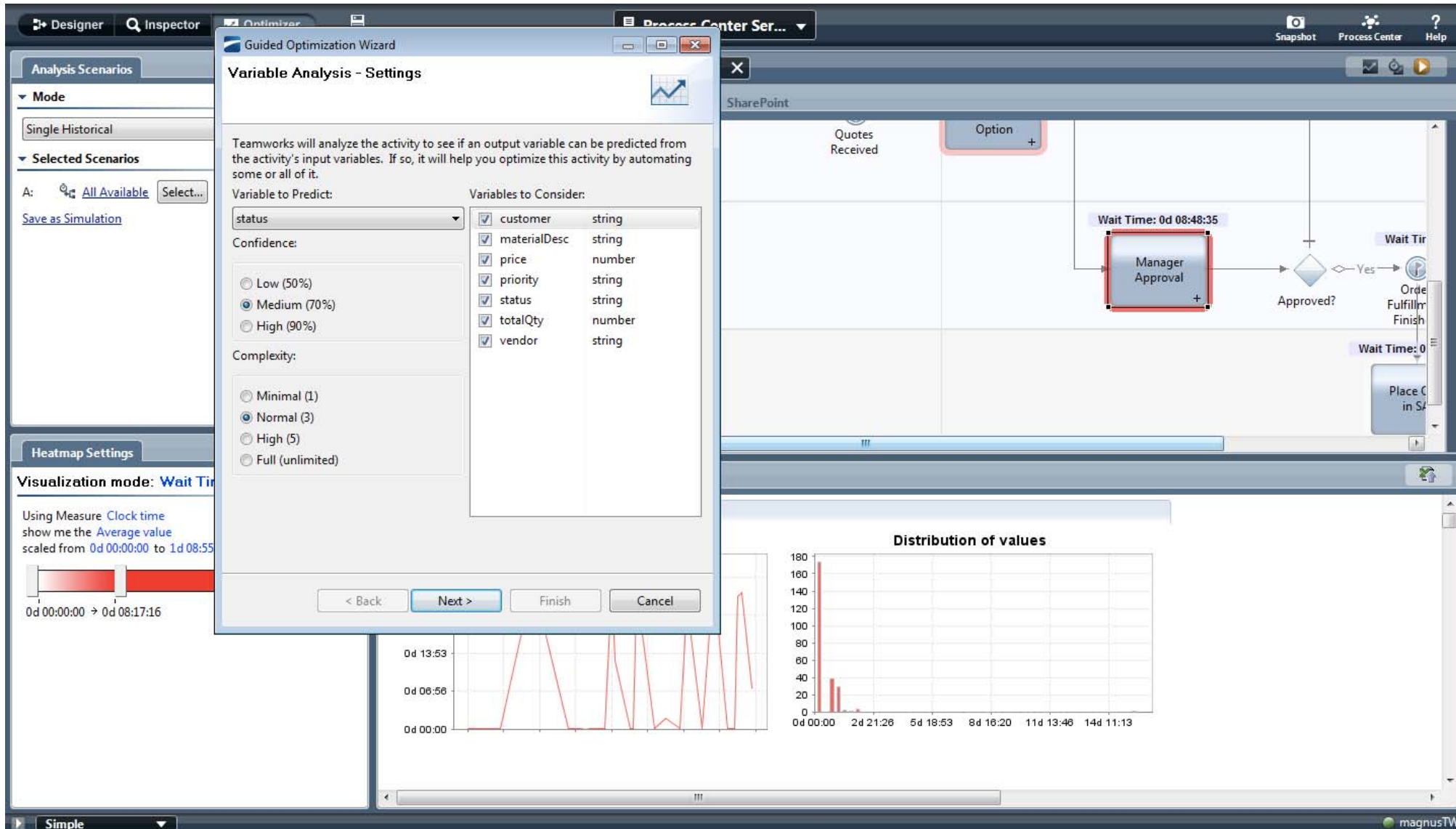
- Top Bar:** Includes 'Designer', 'Inspector', 'Optimizer', and 'Save' buttons. The current process is 'Order Fulfillment'.
- Analysis Scenarios (Left Panel):** Shows 'Mode' set to 'Single Simulation' and 'Selected Scenarios' including 'vendor Mgmt'. A 'Calculate' button is present.
- Process Diagram (Center):** A swimlane diagram showing the process flow between 'Vendor' and 'System' lanes. Key steps include 'Send RFQ', 'Order Fulfillment Started', 'Get Vendor Responses' (highlighted with a red box and a wait time of 1d 08:10:09), and 'Select Fulfillment Rules' (with a wait time of 0d 00:00:00). A 'Missed SLA' event is also shown.
- Heatmap Settings (Bottom Left):** Shows 'Visualization mode: Wait Time' and a color scale from 0d 00:00:00 to 1d 08:55:49.
- Live Reports (Bottom Right):**
  - Summary for Process "Order Fulfillment":**
    - Instance Duration Trend:** A line graph showing duration over time.
    - Instance Duration Histogram:** A bar chart showing the frequency of instances at various durations.
    - Users also worked on:** A pie chart showing that 100% of instances were worked on by 'Order Fulfillment'.
  - Instance Analysis Table:**

Number Executing	Number Completed	Duration			
		Min	Avg	Max	Dist
18	56	1d 6h 57m 33s	4d 11h 10m 27s	9d 1h 18m 37s	



# Lombardi WebSphere Teamworks – Unique Benefits

Use process data to improve and optimise your business – \* CIO Study



The screenshot displays the IBM Business Process Manager (BPM) interface. A 'Guided Optimization Wizard' dialog box is open, showing the 'Variable Analysis - Settings' screen. The wizard is configured to analyze the 'status' variable, with a confidence level of 'Medium (70%)' and a complexity of 'Normal (3)'. The 'Variables to Consider' list includes: customer (string), materialDesc (string), price (number), priority (string), status (string), totalQty (number), and vendor (string).

The background process flow diagram shows a sequence of activities: 'Quotes Received', 'Option', 'Manager Approval' (highlighted with a red box), and a decision diamond 'Approved?'. The 'Manager Approval' activity has a 'Wait Time: 0d 08:48:35'. The 'Approved?' decision leads to 'Order Fulfillment Finish' (Wait Time: 0) and 'Place C in S' (Wait Time: 0).

At the bottom, a 'Distribution of values' chart shows a histogram of values for the 'status' variable, with a peak at '0d 00:00' and a secondary peak at '0d 13:53'. A line graph below it shows the 'status' variable's value over time, with a red line indicating the current state.



# Lombardi WebSphere Teamworks – Unique Benefits

Use process data to improve and optimise your business – \* CIO Study

Designer Inspector Optimizer Save Process Center Ser... Snapshot Process Center Help

Analysis Scenarios

Mode: Single Simulation

Selected Scenarios: A: vendor Mgmt Select... New Calculate

Heatmap Settings

Visualization mode: Wait Time

Using Measure Clock time show me the Average value scaled from 0d 00:00:00 to 1d 08:55:49

0d 00:00:00 1d 08:55:49

Order Fulfillment

Overview Diagram Variables Tracking Process KPIs SharePoint

Send RFQ RFQ Response

Vendor: Order Fulfillment Started Get Vendor Responses (Wait Time: 1d 08:10:09)

System: Missed SLA Select Fulfillment Rules (Wait Time: 0d 00:00:00)

Wait Time: 0d 00:00:00 Wait Time: 0d 00:12:43 Wait Time: 0d 00:15:44 No

Live Reports Analysis Reports

KPI Analysis

Cost				
Activity Name	Number Of Occurrences	Sum	Average/Instance	
Create Order		14	\$504.54	\$6.82
Get Vendor Responses		67	\$6600.00	\$89.19
Manager Approval		71	\$13612.99	\$183.96
Place Order in SAP		56	\$18.68	\$.25
Review Order		59	\$2310.86	\$31.23
Select Fulfillment Option		79	\$3076.00	\$41.57
Select Fulfillment Rules		66	\$10.98	\$.15
<b>Total</b>			<b>\$26134.04</b>	<b>\$353.16</b>

Labor Cost			
Activity Name	Number Of Occurrences	Sum	Average/Instance

Simple

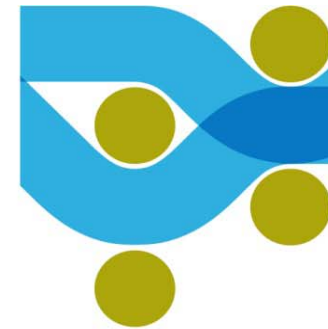
magnusTW

**Deal elapsed time was reduced by 60% and process complexity was reduced by 30%. Each deal is fully audited end-to-end.**



## Smart Decisions for a Smarter Planet

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Working together and applying our 'Know-How' in your implementation



# Identifying good BPM candidate projects

- BPM solutions work best when one of the following situations applies to your organisation:
  1. The project is not highly automated today and crosses a series of paper, people and system boundaries.
  2. The project is process-intensive, it involves automating and routing complex business processes.
  3. The project involves complex decision making or business rules and are likely to change frequently to meet business needs.
  4. The project will be required to access data from other internal systems or from the backend systems of supply chain or trading partners.
  5. The business rules and/or processes that need to be built are also required in other areas of the business.

# Goals and measurements for the BPM project

- Set challenging but realistic goals.
  - What results do you anticipate from this project?
  - Will cycle time be reduced by 50%?
  - Will defects be eliminated or at least reduced by 90%?
  - Will variable costs be identified and capped to a certain dollar figure per transaction?
  - Will customers be on boarded in a shorter period of time?
- Define process improvement measurements.
  - What are the measures that you'll use to determine effectiveness of the project?
  - Will it be £ - \$ - € /item?
  - Will it be cycle time in days?
  - Will it be reducing call queue time in seconds?
  - Specify all you think may be necessary, but make sure that they are within the scope (process start/stop points) of your project.

# Lombardi Global Business Solutions Process 'Know How'

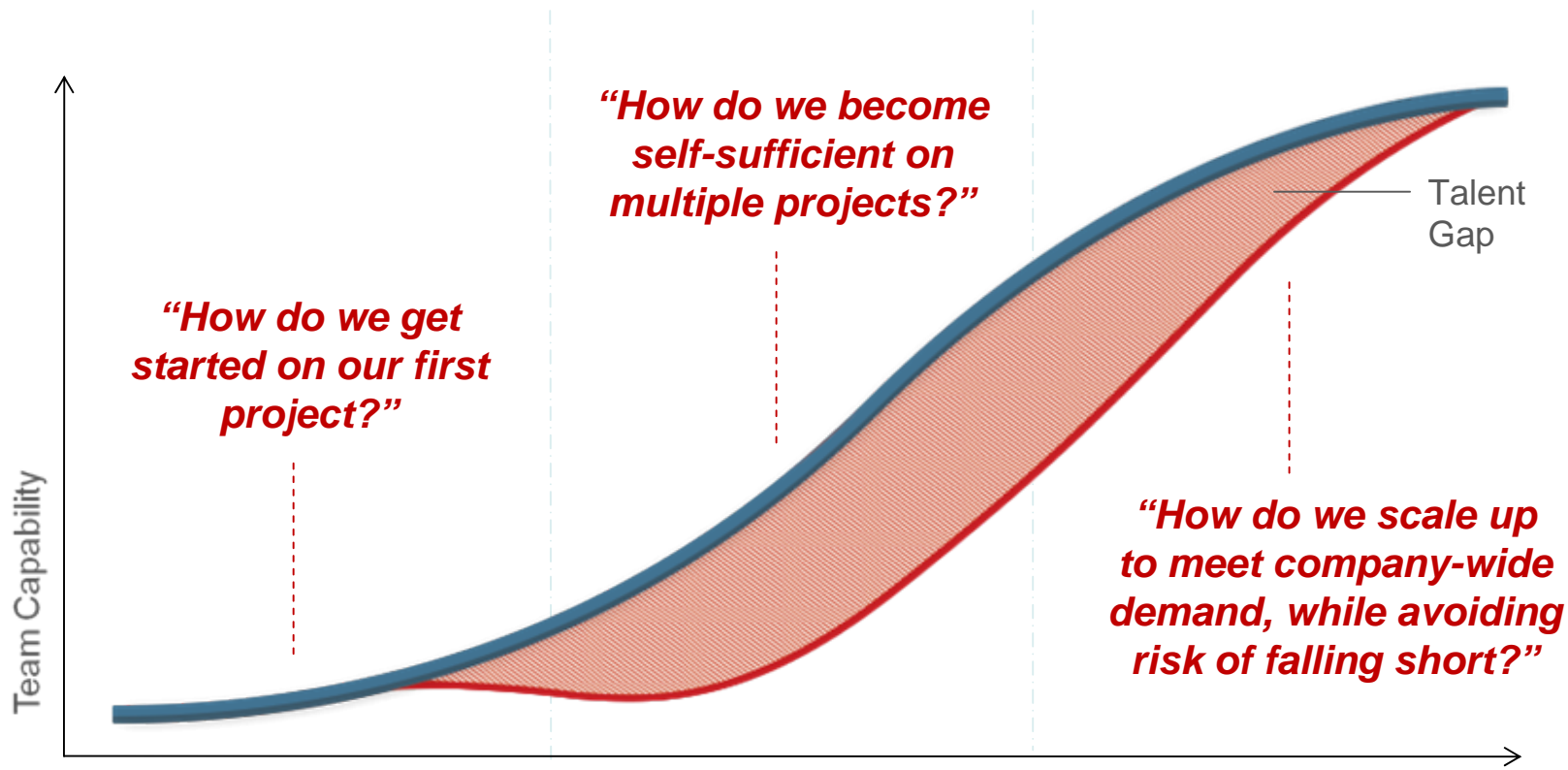
- ▶ Proven methods developed over 1,000 BPM projects
- ▶ World-class team of globally based BPM experts
- ▶ Differentiated approaches for achieving BPM success:
  1. Start with a Project, but plan for a Programme
  2. Up-front Analysis maximises the value of project implementation
  3. Iterative Playbacks minimise cycle time of delivery and change
  4. Mentoring (not just training) is the key enabler for self-sufficiency
  5. On-Demand Assistance most effective for maintaining momentum
- ▶ Prepare for self sufficiency
  - ▶ Flexible range of certification programmes
- ▶ Engagement options
  1. Client leads & Lombardi educates
    - ▶ Recommended Services: Training, Install & Configuration, Implementation Mentoring and Basic LODA\* Subscription
  2. Lombardi leads & Client participates/observes
    - ▶ Recommended Services: Training, Install & Configuration, Process Analysis, Process v1 to full Implementation

\*LODA - Lombardi On Demand Assistance

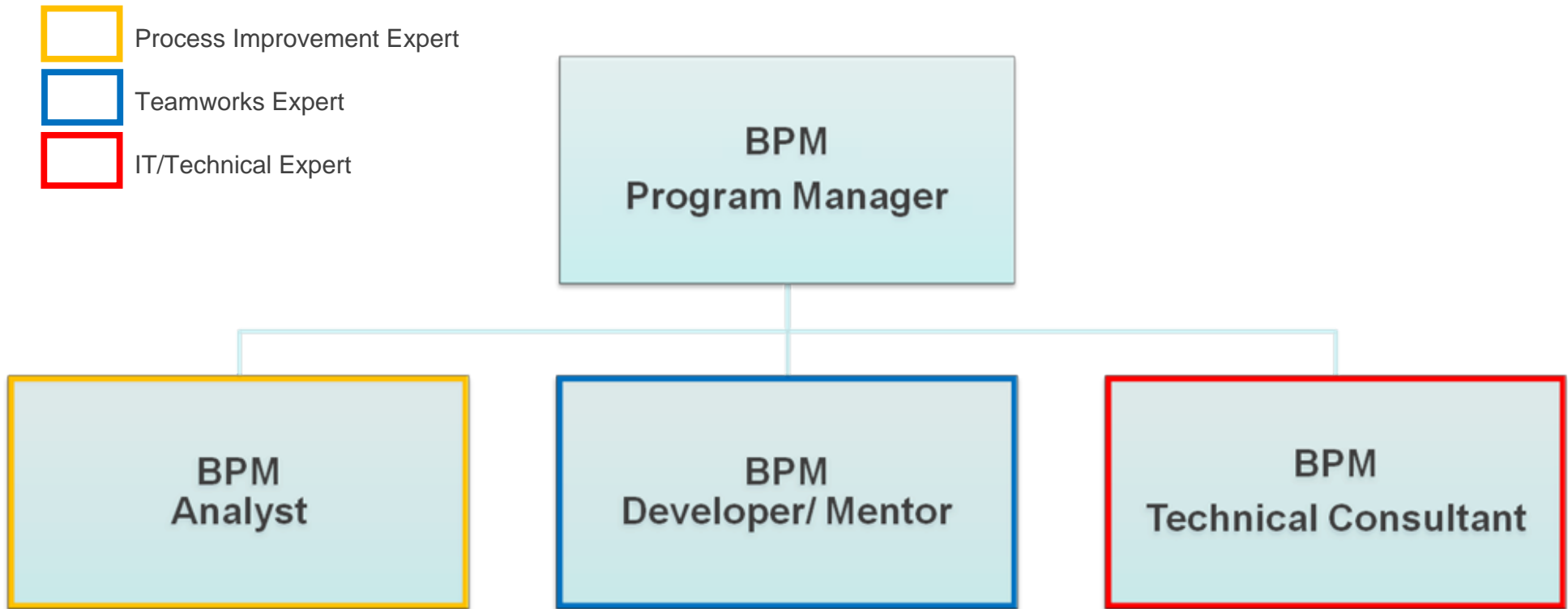
# Developing capability for your BPM journey



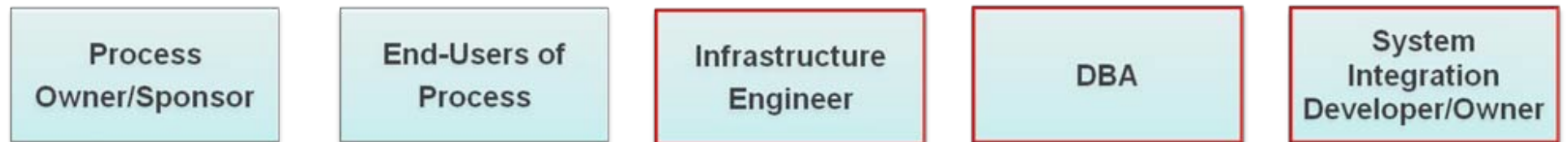
<b>Objective</b>	Prove Value	Embed in Core Operations	Drive & Align Direction
<b>Result</b>	Proof Point Solutions	Mission Critical Solutions	Strategic Program







# Typical BPM Team



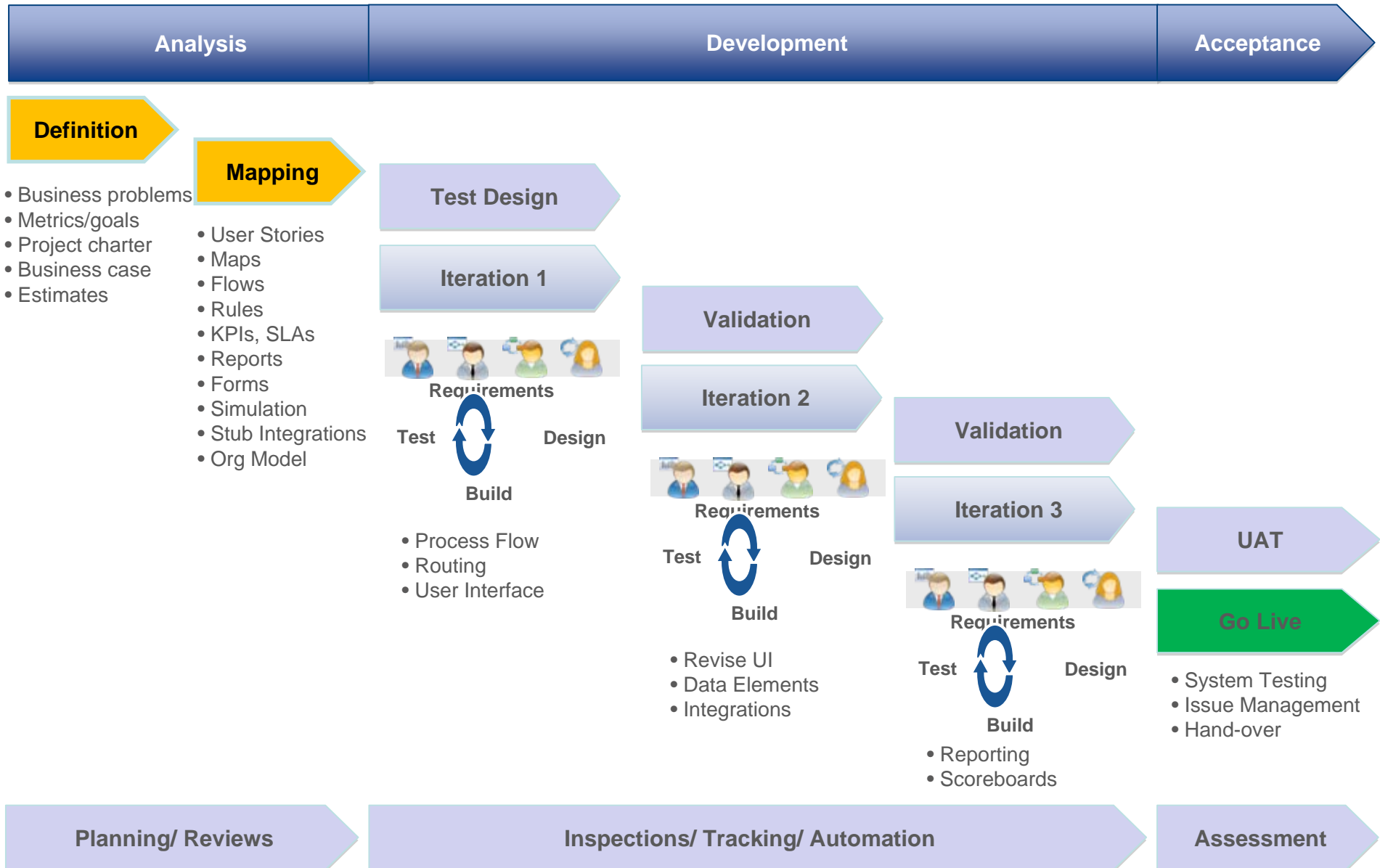
## Client Supporting Roles:



# Lombardi BPM Project Team – Responsibilities & Skills

Role	Responsibilities	Skills Required
<b>BPM Analyst</b> 	<ul style="list-style-type: none"> <li>• Leads process improvement efforts</li> <li>• Expert in process decomposition, scoping, optimization</li> <li>• Power user of Blueprint and Teamworks Optimizer</li> <li>• Identifies business case, key opportunities, and ROI</li> <li>• Enforces delivery of KPIs, SLAs, and scoreboards</li> </ul>	<ul style="list-style-type: none"> <li>• Experience with process design, requirements gathering, facilitation</li> <li>• Critical Analysis and Reporting skills</li> <li>• Lean Six Sigma training / certification</li> </ul>
<b>BPM Consultant</b> 	<ul style="list-style-type: none"> <li>• Drives Business Playback sessions</li> <li>• Expert in Teamworks features in the context of solutions</li> <li>• Implements process flows, services, business logic, and user interfaces</li> <li>• Develops KPIs, SLAs, and scoreboards</li> <li>• Models organization and task routing rules</li> </ul>	<ul style="list-style-type: none"> <li>• Experience with Teamworks process development and experience with software development leadership</li> <li>• JavaScript, JSP, SQL, basic logic flows, User Interface development, HTML, .NET</li> </ul>
<b>Technical Consultant</b> 	<ul style="list-style-type: none"> <li>• Responsible for systems architecture</li> <li>• Designs and implements integrations, custom data storage, and complex data manipulations.</li> <li>• Guides infrastructure design and implementation</li> </ul>	<ul style="list-style-type: none"> <li>• Experience with software projects and OOAD. Experience in architecture planning, application services, etc</li> <li>• J2EE, Java, JSP, SQL, SOAP, XML, XSLT, patterns, advanced logic flows, EAI, .NET</li> </ul>
<b>BPM Program Manager</b> 	<ul style="list-style-type: none"> <li>• Expert in Iterative Delivery Methodology</li> <li>• Manages scope, budget, and resources</li> <li>• Identifies and mitigates risks</li> <li>• Conduit for escalations and issue resolution</li> <li>• Provides internal and external status and dashboards</li> <li>• Lets Delivery Team deliver</li> </ul>	<ul style="list-style-type: none"> <li>• Experience delivering iterative projects and managing program roadmaps that are delivered incrementally</li> <li>• Able to facilitate business and IT collaboration</li> <li>• Communicates to sponsor and executive levels of the organization</li> </ul>

# Typical Lombardi WebSphere Teamworks 'Project' Time Line



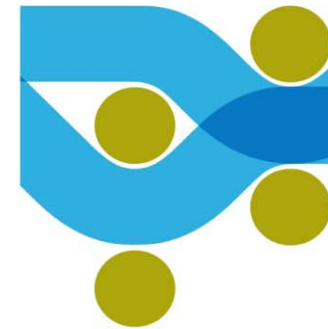


**“  
If you haven't already started  
down this path .....you are in  
reverse!  
”**

Toby Redshaw, CIO Aviva plc,  
Gartner BPM Summit February 2009

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# Teamworks, WebSphere Process Server & ILOG – Working Together for Added Value



**Build** the right process applications

- Single environment
- Single model
- Playbacks for engagement



**Improve** processes with inherent visibility

- KPIs and SLAs
- Auto-correlated data & metrics
- Visual optimization



**Manage** all aspects of your BPM Program

- Centralized management
- Versions & dependencies
- One-click upgrades

## Teamworks 7 for business-led process improvement projects.

- Human Interaction
- Playbacks for Engagement
- Visual Analysis & Optimisation
- Rapid Change Deployment

## WPS for high integrity process automation.

- Enterprise System Orchestration
- Straight-Through Processing
- Transactions & Recovery
- Security

## Deploy and Execute with Process Integrity

*Enabling consistent transaction processing in an SOA environment*

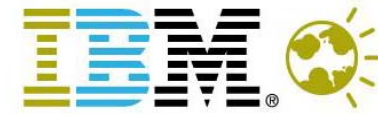
Smart SOA

Process Integrity is the degree to which loosely coupled "open" systems deliver the reliability, consistency, scalability and predictability of tightly coupled "closed" systems



- Enabled by
  - Compensation spheres
  - Transaction boundaries
  - Transaction security
  - Human handled exceptions
  - Recovery management for failed processes
  - Fault handlers (for unexpected behavior)
  - Greater flexibility in controlling the flow of the business processes
  - Short & long running transaction rollback
  - Work order preservation & event sequencing
  - Service invocation retry
  - Restricting auto deletion to tasks that completed successfully





# The Right Set of Platforms for Managing Your Business

- Straight-Through Processing in WBM & WID

The image displays three screenshots from the IBM WebSphere Integration Developer 7.0 environment, illustrating the configuration of a business process for straight-through processing.

**Top Left Screenshot:** Shows a high-level process flow with three main steps: "Receive Electronic Payment", "Lookup Customer in CRM System", and "Verify with Accounts Receivable System". A decision diamond follows, with a "Yes" path leading to "Successfully Verified" and a "No" path leading to "Invoice".

**Top Right Screenshot:** Shows a detailed flowchart of the process. It starts with "Receive", followed by "Lookup Customer Information in CRM", "Lookup Amounts for Invoice Items in Accounts Receivable System", and "Verify Amounts". A decision diamond "Verification Successful?" branches into "No" (leading to "Discrepancy Found - Business Exception Path") and "Yes" (leading to "Amounts Successfully Verified"). The "No" path includes "Map to TW Invoice" and "Send Business Exception to Teamworks". A "Receive Business Exception" activity is shown, followed by an "Invoke - Send Business Exception to Teamworks" activity. A decision diamond "Business Exception Successfully Resolved?" branches into "No" (leading to "The issue could not be resolved, the system will not be updated") and "Yes" (leading to "Business Exception Resolved" and "Update all Bill Processing Systems").

**Bottom Screenshot:** Shows the configuration for the "Invoke - Send Business Exception to Teamworks" activity. The configuration includes:

- Partner: TeamworksBusinessException
- Interface: bdToolsPortType
- Operation: raiseBusinessException
- Use data type variables mapping:

A table below shows the input mapping:

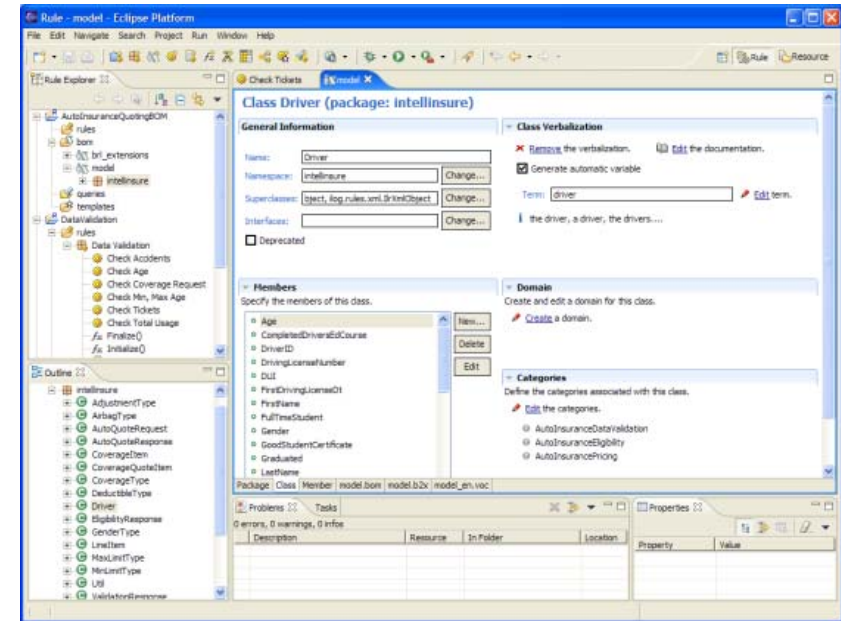
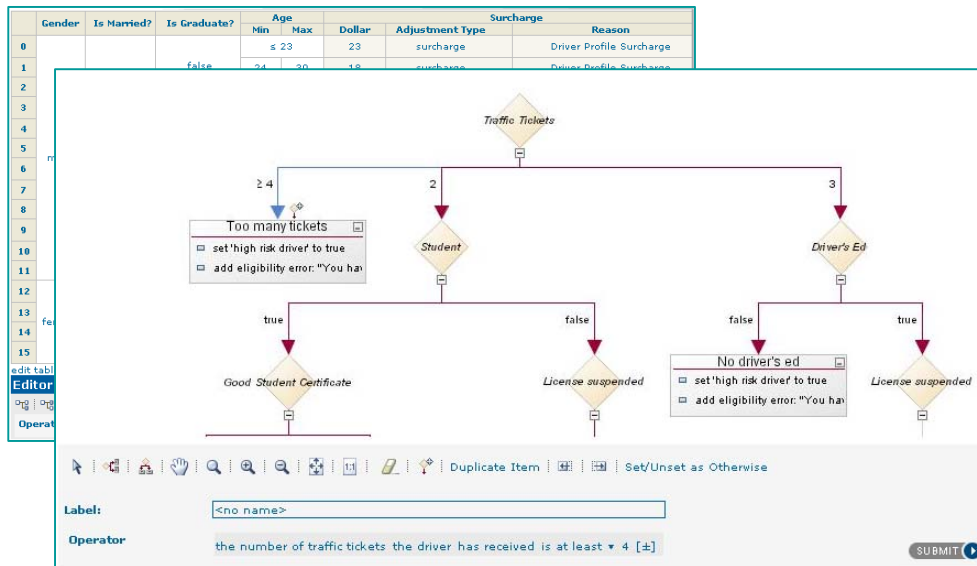
Name	Type	Read from Variable
twInvoice	ws_twInvoice	twInvoice

# An Integrated BPM & BRM Platform



Leveraging highly-compatible technology & implementation approaches

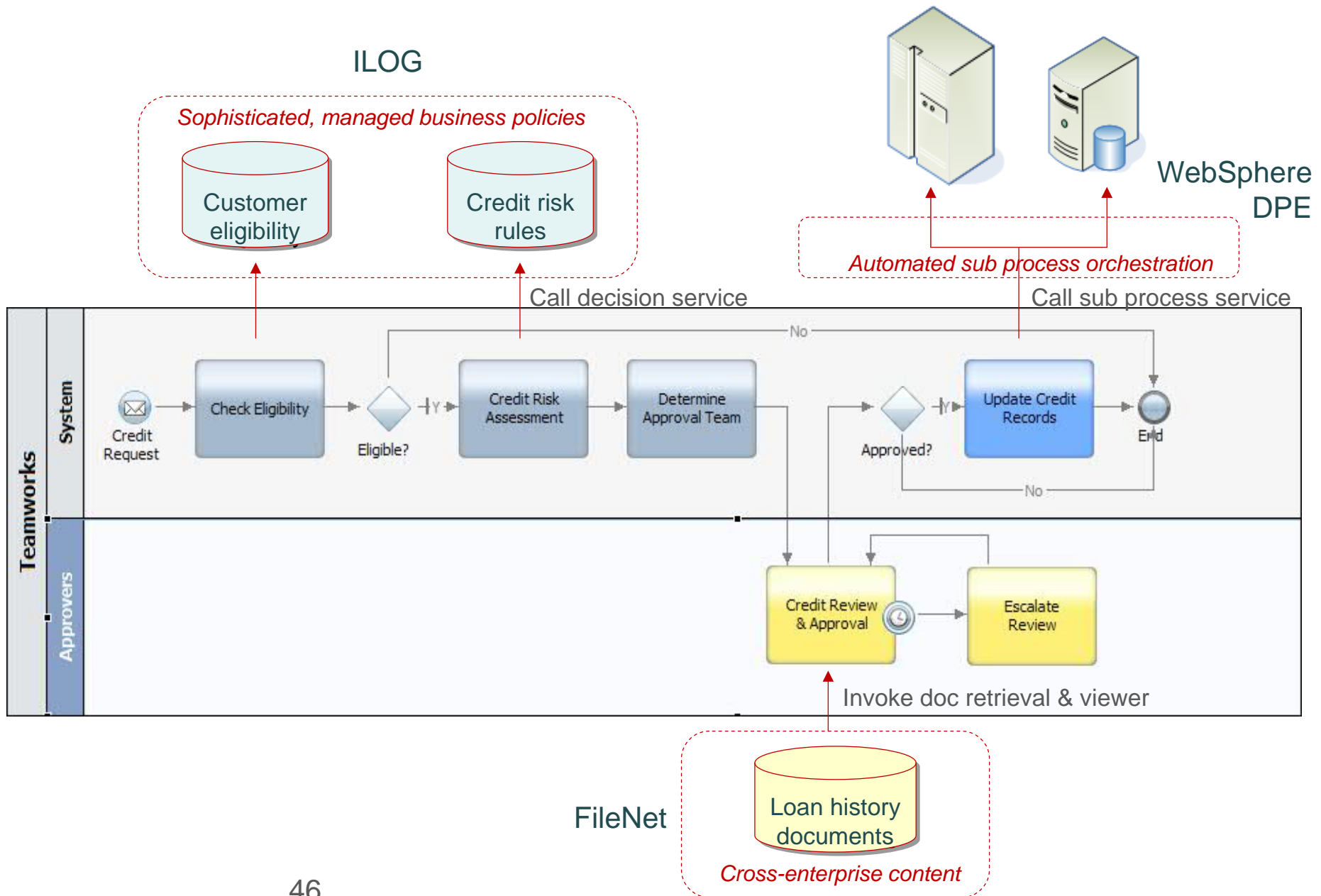
- **Complete:** Full support of the entire life cycle for both business processes and business rules
- **Flexibility:** Same model-driven design & execution approaches
- **Ease-of-development:** Same graphical design environment



- **Interoperability:** Same comprehensive support for industry standards makes integration easy
- **Scalability / Availability:** Same Java Enterprise Edition, clustering, failover
- **Management:** Same focus on tools for analysis, control, and optimisation of business functions



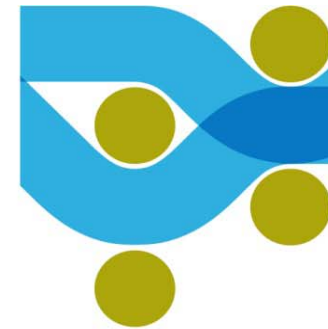
# The Right Set of Platforms for Managing Your Business





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# Customer Success Stories – How Lombardi Teamworks helps to Improve Human Productivity



# Adding WebSphere Process Server to Teamworks Transactional Integration & Orchestration



- ▶ Teamworks Team – **Life Insurance Policy Underwriting**
  - Using Teamworks to guide customers, agents, and underwriters through the collaborative underwriting process.
- ▶ Core Systems Team – **Policy Initiation**
  - Need to update multiple back-office systems that manage policy administration, billing, and premium payments.
  - WPS can orchestrate the policy initiation as a single transaction.

# The Value of Human Productivity Improvement

## Efficiency



Eliminating up to 80% of the “human touches” in Invoice Reconciliation



**AVIVA**

Reduced IT process change request time from 4-5 weeks to a couple minutes in some cases.

Reduced time to productivity for new employees by improving co-ordination between line manager, HR and IT



Reduced and simplified RFQ cycle time by 80%.

## Effectiveness

Now comply with 18 week Referral-to Treatment directive – avoiding government penalties



Saves \$2m per quarter by resolving Distressed Shipment more effectively



Advanced Product Creation cut product ‘facelift’ feasibility study from 10 weeks to 2 days



Increasing organisation effectiveness by reducing human touches of 5-20 people in 1,000 centres.

## Agility



Identifying areas of waste in the IPM process, shortening time to market for new product introduction



Full Audit Trail for compliance in their grants process – 1<sup>st</sup> major pharma to be compliant



Integrated legacy billing systems and call centre personnel  
Reduced billing dispute resolution down from 12 to 2 days  
Achieved project payback in 6 months.



# Opportunities for Human Productivity Improvement

- [HR Self-Service Case Study](#)  
**Cut processing time by 90%**
- [Insurance Invoicing Case Study](#)  
**Eliminating manual work in handling over 500,000 invoices per month**
- [Life Sciences Sales Operations Case study](#)  
**Reducing process cycle time from 30 to 7 days for 12,000 sales people**
- [Lee Memorial Health System Case Study](#)  
**Saving 21,000 hours in the new employee on-boarding process**
- [Manufacturing Logistics Case Study](#)  
**Coordinating product returns to save \$2M per quarter**
- [Manufacturing Supply Chain Case Study](#)  
**Improving productivity by 250% in Vendor Management**
- [Pulte Mortgage Case Study](#)  
**Driving customer satisfaction with proactive process management**
- [Telecom Billing Case Study](#)  
**Realising ROI in under 6 months by handling disputes better**
- [Financial Services Case Study](#)  
**Kleinwort Benson Eliminates Risk in Private Banking Processes**
- [Mondial Assistance Group Case Study](#)  
**Mondial Assistance Group Shares Best Processes to Improve Quality, Efficiency**
- [MUSC Research Grants Processing Case Study](#)  
**Reducing typical processing time from 4 days down to 40 seconds**
- [National Institute of Health HSPD-12 Case Study](#)  
**Complying with the Homeland Security Presidential Directive 12 on time**

# Opportunities for Human Productivity Improvement

- **IT issues and challenges**

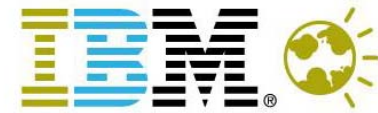
- Frequent change requests to handle process exceptions
- Frustration over constant changes to business requirements
- Pressure for shorter development cycles
- ~~Requests for reports that span multiple systems~~

- **IT Outcome; Cannot keep pace with rate of business change**

- **Business issues and challenges;**

- High labour cost to execute process
- Inconsistent, 'personality driven' work quality
- Inaccurate forecasting of work completion
- Difficult to provide status reports
- Employee and customer frustration
- ~~Reliance upon tacit knowledge~~

- **Business Outcome; Cannot effectively manage process performance**



# Opportunities for Human Productivity Improvement

- Thank you and Questions
- **Start Blueprinting your business process today – take up Free Trial of Lombardi WebSphere Blueprint**
- **[www.lombardi.com/blueprint](http://www.lombardi.com/blueprint)**
- For local engagement please contact with **André Ramseier** [anra@ch.ibm.com](mailto:anra@ch.ibm.com) IBM Suisse +41 58 333 21 08 or +41 79 455 25 46 (mobile)
- Request a Lombardi WebSphere Human Productivity Improvement consultation
- For any additional enquiries, please contact Jon Coles – Lombardi – An IBM Company [jon.coles@uk.ibm.com](mailto:jon.coles@uk.ibm.com) +44 7833 451125