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Vendor Snapshot: Lombardi Blueprint Bridges Gap Between Process Discovery And Execution

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EXECUTIVE SUMMARY

Austin-based Lombardi Software's latest offering, Blueprint, positions the vendor to extend its leadership in human-centric business process management (BPM) and takes direct aim at Microsoft Word, PowerPoint, and Visio as the tools of choice for process analysts. Blueprint provides a process modeling and discovery platform that blends collaboration and documentation capabilities into an easy-to-use, low cost, software-as-a-service offering that can be used by beginner to expert process analysts. To stay ahead of the pack, the platform needs to continue extending its collaborative Web 2.0 functionality as other BPM suite vendors play catch-up by introducing similar offerings. Consider Lombardi Blueprint if you need a collaborative and lightweight process discovery tool that is tailored to support geographically dispersed process discovery teams.

KEY IDEA: KNOWLEDGE WORKERS NEED TO LINK BPM STRATEGY TO EXECUTION

Process analysts are frustrated and fed up with the limited process discovery functionality provided by BPM suites. Many analysts ditch their respective BPM suite's built-in modeler in favor of "ready-to-use" documentation tools such as Microsoft Word, Visio, and PowerPoint. Although these tools have very little to do with process discovery, they're familiar, don't require any learning curve, and allow analysts to start with a blank sheet of paper. But using these tried-and-true tools often introduces serious disconnects between the BPM strategy defined during process discovery and the executable process developed by the technical team. Some organizations try to address these disconnects by acquiring comprehensive business process analysis (BPA) tools such as Aris, MEGA, or Metis.[1] While BPA tools are well-suited to process discovery, most process analysts only need a small subset of the full functionality provided by BPA tools, and many find the learning curve too steep.

WHAT'S DIFFERENT: BLUEPRINT ENABLES LEAN PROCESS DISCOVERY

Lombardi Software, based in Austin, is a pioneer in the pure-play BPM market.[2] With a portfolio of blue-chip customers, the company's Teamworks BPM Suite continues to be a leader in the human-centric BPM category. In April 2007, seeking to move further up the BPM value chain, Lombardi introduced a new offering, Lombardi Blueprint. Blueprint targets business analysts and process professionals responsible for driving business case definition and process discovery within their organizations. Key features of the Blueprint platform include:
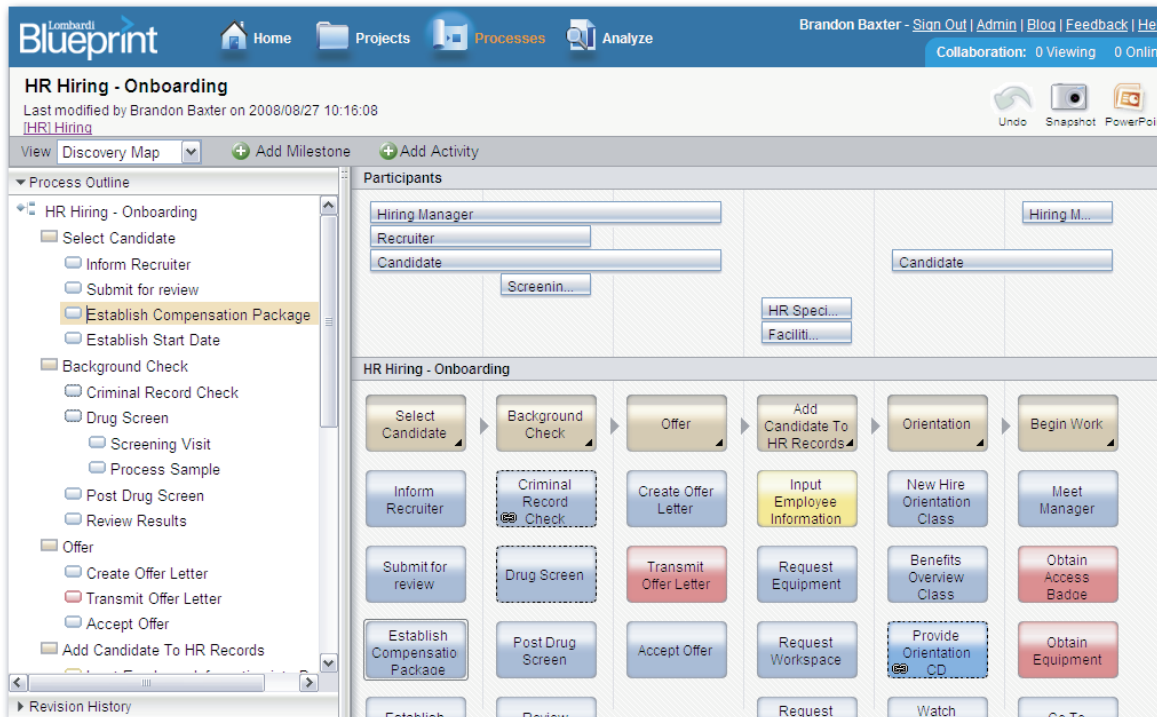
· **Lightweight process modeling.** Blueprint combines the best of both worlds for analysts: the "ready-to-use" feel of office productivity tools and the comprehensive knowledge repository found in traditional BPA tools. Process analysts can brainstorm processes and prioritize key objectives with high-level "Discovery Maps" (see Figure 1). From the "Discovery" view, analysts can automatically generate lower-level process diagrams and documentation. Since all of Blueprint's views are linked, a change to one view or section updates the others. Process analysts can pull in existing workflow diagrams from Visio using a symbol-mapping interface that associates Visio symbols with specific BPM activity types within Blueprint. Analysts can also output process discovery documentation to PowerPoint-formatted discovery reports that can be modified and updated externally.

· **Collaborative process discovery.** Collaboration is woven in to the very fabric of Blueprint. The platform was built from the ground up using Google Web Toolkit (GWT), which allows developers to create highly interactive and collaborative Web 2.0 applications. The completely browser-based platform is delivered through a software-as-a-service (SaaS) model that allows geographically dispersed teams to collaborate on process models and definitions in real time. Behind the scenes Blueprint automatically tracks changes and handles versioning, creating audit trails for teams to accept or reject process modifications.

· **Smooth transition to process execution.** With most BPM suites, process analysts and developers often complain about starting from scratch when it comes time to build the executable process solution. All the modeling and knowledge captured during process discovery must be recreated within the BPM suite. Blueprint solves this problem by generating process definitions that can be exported to the company's Lombardi Teamworks BPM suite. Under the covers, Blueprint creates process models that adhere to the Business Process Definition Metamodel (BPDM) standard developed by the Object Management Group (OMG), a standards body responsible for establishing industry standards for BPM and process modeling. These BPDM models can be read by Teamworks since it also uses the same modeling standard.

Figure 1 Lombardi Blueprint Links Process Strategy To Execution

48120   Source: Forrester Research, Inc.

HOW IT'S BEING USED: COLLABORATIVE PROCESS DISCOVERY AND OPTIMIZATION

Blueprint has established a notable following, with Lombardi reporting more than 4,000 companies using the platform in more than 100 countries. The following three vendor-provided case studies, revolve around a similar theme: the need for dispersed teams to quickly build detailed process knowledge repositories.

- **Mapping business-to-business (B2B) processes.** Morphis Software, a leader in currency supply chain management, uses Blueprint to document and validate its customers' supply chain processes. During collaborative sessions, Morphis draws on Blueprint's Discovery Map functionality to quickly sketch out the customer's process as users explain the process to Morphis supply chain consultants. This allows Morphis process analysts to visually identify gaps in the process and distill the lower-level process definition before moving forward with implementation. With clients and team members located around the globe, Blueprint's SaaS model has reduced travel expenses for Morphis without affecting real-time collaboration.

- **Formalizing process knowledge.** Tillamook County Creamery, an Oregon-based food and beverage manufacturer, used Blueprint to document "tribal knowledge" within its business units that had been handed down from generation to generation. Tillamook's CEO realized that the company needed to formally document this tribal knowledge to remain competitive and improve process execution across business units. Using Lombardi Blueprint, the company worked collaboratively with business units to quickly model and validate processes in order to break down siloed process knowledge and prioritize process objectives and projects.

- **Driving process improvement initiatives.** TeliaSonera, a Nordic and Baltic telecommunications provider, acquired both Lombardi Teamworks and Lombardi Blueprint to support process improvement initiatives for its Finnish sales division. Lombardi reported that TeliaSonera plans to use Blueprint and Teamworks to improve operational efficiency by eliminating rework, reducing handoffs, and shortening delays. Process definitions scoped and defined in Blueprint will be imported into Teamworks to be further refined and then developed for execution.

WHAT'S NEXT: MORE FOCUS ON COMMUNITY COLLABORATION

Lombardi Blueprint represents a new way of developing, delivering, and interacting with software — the combination of SaaS, Web 2.0, and business process. True to the trend of lean software, Lombardi delivers updates to the platform in five- to six-week cycles.[3] With its blog, the company has also built a community around the Blueprint platform, regularly posting information on new releases and customer successes. While Blueprint and similar offerings have started catering more to the process analyst community, still more work is needed:

- **Sharing industry-specific blueprints.** Neophyte BPM customers don't want to start from scratch; they want to begin with a baseline process that represents best practices within their industry or discipline. This is particularly true of customers that start with the proverbial low-hanging fruit (e.g., recruiting, employee onboarding, collections, etc.), as their first process. While the Blueprint platform does not include industry-specific templates, Lombardi reports that some of its partners are considering creating templates that are tailored to specific vertical and horizontal business processes.

- **Sharing blueprints with the world.** The primary driver for Web 2.0 is a burning desire to share information with the world — à la Facebook, LinkedIn, and your own blog. This need does not stop at the individual level. Now, more than ever, organizations want to share best practices, use cases, and ways to overcome common challenges. While commercial industry might show some restraint around sharing process models and designs, public-sector organizations are being pushed to collaborate and share best practices on cross-government and cross-agency processes. As different government agencies adopt Lombardi Blueprint as a standard, they will likely seek to extend the platform to create a community repository where they can publicly upload and share Blueprint process models and definitions, and possibly request public comment.

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- **Sharing with other BPM suites.** Understandably, Lombardi might not be interested in making it easier for Blueprint to share process models with competing BPM suites. However, the vendor has already gone a long way toward this by generating process definitions using the BPDM standard. Still, many BPM suites use XPDL or other standards to generate and render process definitions, requiring savvy developers to transform Blueprint's BPDM models into XPDL or another format to import process definitions. Given the limited process knowledge repository capabilities of most BPM suites, Blueprint could find a treasure trove of champions within organizations that have already acquired a Lombardi Teamworks competitor for process execution. A process model translator that converts Blueprint models into other common BPM suite model formats would minimize resistance from IT.

WHAT IT MEANS

MORE BPM VENDORS WILL AMP UP THEIR FOCUS ON BUSINESS AND PROCESS ANALYSTS

From the very beginning, BPM suite vendors sold business and process analysts on empty promises of easy-to-use modeling capabilities. Lombardi is one of the first BPM suite vendors to deliver on the promise of ease of use for process analysts. Lombardi Blueprint combines collaboration, ease of use, and a centralized process repository into an inexpensive and elegant SaaS-based offering. Watch for BPM suite vendors to continue simplifying their modeling environments for process analysts and providing more robust functionality to connect process strategy and discovery to process execution.

ENDNOTES

[1] Forrester evaluated leading enterprise architecture (EA) tools vendors across 120 criteria and found that Casewise, IDS Scheer, MEGA International, Proforma, and Telelogic confirmed their EA tools leadership in this double-digit growth market. Relatively new entrants alfabet, Agilense, Troux, and Adaptive are also Strong Performers but lack the most advanced features like simulation or templates. Finally, Embarcadero is a newcomer in the EA tools market arena and could be a good entry point for data-focused, lightweight EA initiatives. See the April 25, 2007, "The Forrester Wave™: Enterprise Architecture Tools, Q2 2007" report.

[2] Leveraging the lab-based "The Forrester Wave™: Human-Centric BPM For Java Platforms, Q3 2007" report, Forrester evaluated leading vendors with business process management suites (BPMS) for banking and investments across 17 criteria. Pegasystems and Appian established early BPM suites for banking and investments leadership — thanks to their human-centric BPMS capabilities and deep prebuilt processes for banks and investment firms. IBM follows closely as a Leader, also with processes available through its Information FrameWork (IFW). TIBCO Software and Lombardi Software close out the Leader category with strong strategies that include support for centers of excellence (COEs). In the Strong Performer category, Software AG and Savvion provide the required flexibility for process development and execution in financial services (FS). Graham Technology, another Strong Performer, is a niche player in banking with

extremely strong professional services and sales expertise. Finally, BEA Systems, HandySoft Global, and Fujitsu are also Strong Performers with either process templates or strong staff expertise in banking. See the August 30, 2007, "The Forrester Wave™: Human-Centric BPMS For Banking And Investments, Q3 2007" report.

[3] Bloat kills. Whether it's excessive complexity in the application, its underlying platform or architecture, or the process used to deliver it, overloaded platform software and heavy processes impede delivery of the solutions the business demands. Yet most enterprises are awash in application suites, development tools, processes, and platforms that have grown so large they no longer resemble the clean and clear vision of their original purpose. Lean software is emerging as the antidote to bloatware, enabling architects and developers to rapidly assemble business solutions that deliver "just in time" the software capabilities the business requires both today and tomorrow. The trend toward lean software has been building for years, but the worldwide recession is accelerating it. All application development professionals should know why and how to incorporate lean software into their software strategies for the future. See the December 12, 2008, "Lean Software Is Agile, Fit-To-Purpose, And Efficient" report.

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