

Management by Process



A Structured Approach for Business Process Management (BPM) Project Success

Course duration: 3 days

Purpose

The purpose of the course is to provide executives, management, project teams and staff with an in-depth understanding of BPM and of a process-focussed organisation.

It offers a pragmatic, step-by-step approach to BPM to the execution of BPM programs and projects.

The course will create a comprehensive understanding of why an improvement in business processes is important. It communicates the benefits, challenges and risks, and illustrates how other organisations have achieved significant sustainable business benefits through implementation of BPM.

Course developers

The course has been prepared by BPM experts John Jeston, Johan Nelis and Derek Miers of BPM Focus. Jeston and Nelis are the authors of the book *Business Process Management – Practical Guidelines to Successful Implementation* (Elsevier, London, 2008), which provides guidance to the best practice BPM project implementation framework, the 7FE Project Framework.

Who should attend?

This course is designed for those involved in, and/or responsible for, achieving successful business process improvement projects and programs, including:

- BPM program and project managers
- Consultants and trainers
- Process analysts
- Business analysts
- General managers
- Business managers
- Senior process architects and analysts
- IT managers

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Course approach

While the course follows a broad outline, it is customised to the needs of the attendees, and allows much discussion on the particular challenges facing the organisation.

Attendees are encouraged to bring either an existing BPM project that they are completing, or a project they would like to complete within their organisation. Working in teams, attendees will progressively complete this project during the course. At the conclusion of the course, attendees give a presentation describing how they completed the project. Expert and constructive feedback is provided.

Outcomes

This course will provide you with:

- A better understanding of the benefits and opportunities of BPM in contributing to the achievement of your organisation's objectives
- A practical step-by-step approach to the successful implementation of significant business process improvements in the on-going management of the business
- Insight into the critical success factors and lessons learned from other organisations
- Knowledge and skills in applying appropriate BPM methods and tools
- An action plan for your specific BPM challenge in your organisation, and a forum to discuss your specific BPM challenges with peers and experts
- It covers
 - How to start. The strengths and challenges of various options are discussed, again related to your specific organisational needs
 - The means by which you may gain initial traction within your organisation
 - How to ensure that a process-focus orientation is embedded and sustainable within your organisation.

Five good reasons to enrol in this course

1. The course is highly interactive and will relate to your particular issues. You will be able to discuss the specific challenges you face in your work place.
2. The course includes case studies from a variety of industries and gives examples of what has worked well and what could have worked better in other organisations.
3. The knowledge you acquire will be immediately applicable. You will receive practical checklists, methods and tools, an overview of useful websites and literature.
4. The training you will receive is based on a proven, consistent yet flexible framework which is easily adjusted to your specific requirements and situation.
5. The course is interactive and practical, providing you with both the knowledge and skills to start right away with your BPM challenges.

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Course Contents

Business Process Management Overview

- Introduction
- What is BPM? Definitions and terms
- Demystification of BPM
- Business drivers for BPM
- Challenges of BPM projects
- Indicators of when BPM could be the right thing for you

Participants' specific issues and challenges

- Discussion of each attendee's BPM issues and challenges

BPM Framework Overview

- Why should a structured approach be used in a BPM project?
- Scenarios in which BPM projects are executed
- Reasons why projects fail
- Critical success factors – what do you need to do to ensure success?
- Three types of BPM project approaches
- How to apply the framework
- The appropriate type of BPM project for you
- Selecting the correct type of project approach for you
- Three types of organisational engagement model approaches
- BPM framework, phases and essentials – an overview
- Can a structured approach to BPM implementations assist my organisation?

Launch Pad – for commencing successful BPM Projects

How do we start and structure a BPM project?

- The importance of the launch pad phase and the main steps
- Why are initial stakeholder interviews important?
- When to complete high-level process walk-throughs
- Purpose of stakeholder identification and engagement
- Where to start the project, and identification of improvement opportunities
- Identifying drivers for BPM opportunities
- What the Red Wine Test is, and why it is important
- Why identifying the likely implementation method is important
- How to define and establish a project team structure and various roles
- Role and structure of a BPM business case
- How to develop the initial project plan

Organisational Strategy and alignment of BPM projects

- Understand typical high-level steps in creating an organisation strategy
- How the organisation strategy is used in each BPM project approach
- Importance of aligning your processes with your strategy
- How your strategic choice influences your processes

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Process Architecture: the basis for the redesign and realisation of BPM initiatives

- Why do you need it, and what benefits you gain from a process architecture
- What is meant by a process architecture and how it relates to organisational strategy and IT architecture
- Typical steps in developing, maintaining and applying process architecture
- How process architecture is used in each BPM project approach

Understanding Phase: common understanding of current processes and appropriate baseline metrics

- Under what circumstances it is useful to analyse and document the current processes
- Steps for understanding the current situation
- Why baseline metrics are needed, and how to evaluate them
- Why root cause analysis is needed and how to do it
- Why completion of a people capability matrix is useful and how to go about it
- Need for the identification of quick wins
- Need to identify innovation priorities

Innovation Phase in BPM

- The purpose, characteristics and main steps of the Innovation phase
- How to gain an understanding of the opportunities and constraints for the Innovation phase
- How to confirm the process goals in response to the identified opportunities and constraints
- Process design principles:
 - functional verses process organisational view
 - customer service verses customer satisfaction
- Improvement versus innovation
- How to conduct process innovation workshops
- How to be creative: tools and techniques
- External stakeholders, and how and when to address them
- How future process metrics assist in business case development and future project direction
- Whether we need to simulate future processes and complete activity-based costing in order to complete future process metrics
- Whether capacity planning is an essential component

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People Phase: Activities, roles and performance measurement in organisational needs

- How to create roles appropriate to your redesigned processes
- How to establish a people-based integrated performance measurement system
- Why and how performance measurement should be introduced
- Performance measurement: which measures should you introduce, why and how
- How to relate staff core capability with training requirements
- Designing a process-focused organisational structure
- Benefits and challenges associated with a process-centric organisational structure

Development Phase: building all components for implementation

- Components and benefits of a BPMS automated solution
- How to minimise development risk in relation to expectations and outcomes
- Limitations and challenges of adopting a pure System Development Life Cycle (SDLC) approach in a BPM environment

Implementation Phase

Purpose of the Implementation phase and the main steps

- Implementation options and scenario discussion in relation to BPM project approaches
- Business involvement and decisions on implementation options
- How to monitor progress in the roll-out

Realise Value Phase:

- Why realising value is so important
- Main steps and how they relate to the other phases of the framework, including a discussion of:
 - Benefits management framework
 - Benefits identification and planning. What are your benefits and how do you plan for their realisation?
 - Benefit milestones analysis and planning
 - Benefits delivery management
- What a benefits realisation register is and why it should be maintained
- How to track benefits delivery
- Who is responsible for the delivery of benefits?

Sustainable Performance

- Transition from 'project' to business-as-usual
- The purpose of sustainable performance and the major steps
- How to develop, embed and monitor sustainability

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BPM Project Essentials: how these aspects permeate all aspects of a BPM project

BPM Project Management

- Broad overview of project management and where it fits within the BPM framework
- An understanding of the difference between a project manager and a BPM project manager
- The differences and similarities between traditional and BPM project management
- Generic project 'gates' and their importance
- Stakeholder management process

People Change Management and Leadership

- Purpose of people change in a BPM project
- Is change necessary, and how important is it?
- The reasons why people resist change, how do they show it and how to overcome it
- Behavioural versus deliberate change actions
- Who are leaders and what does leadership mean in a BPM project context?
- How organisational strategy and leadership are related
- Critical parts of a change communications plan

Embedding Process Management within Your Organisation

- Different levels of BPM maturity
- Creating an environment where business processes are:
 - Managed by an appropriate governance structure
 - Appropriately measured and managed
 - An integral part of 'how we manage our business'
- What other organisations are doing
- What works and what doesn't

Finalisation and presentation of your Action Plan

- Presentation of what you did to ensure your assigned BPM project was successful
- Peer and expert review of team project/assignment project presentation

Bringing it all together

- Review of key learning points
- Review of critical success factors for BPM projects and guidance on how to apply them
- BPM coaching and the role it can play
- Feedback
- Conclusion