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Business Process Automation

Managing Cost in Your Enterprise

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Business Process Automation—Managing Cost in Your Enterprise

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Chapter 3:

Implementing and Deploying a BPA Solution

Executive Overview

In chapter 3 we discuss how to successfully implement and deploy a BPA solution. The planning stage focuses on analyzing existing business processes to identify those that are suitable for the BPA approach and determine how to get buy-in from both management and employees. From planning, we move on to design and finally deployment of the BPA solution.

Planning

Most businesses are built on multiple workflow processes, some automated and some manual. In the past two chapters we've shown how business process automation (BPA) can greatly streamline and simplify workflow processes to help businesses achieve better control over their operations. Process flow is dynamic, so it is important to have tools that are flexible enough to allow change yet defined enough so you can enforce policies and monitor process activities throughout the organization. In this chapter we drill down to the steps you need to follow to successfully implement and deploy a business process automation solution in your organization.

Analyzing Existing Business Processes

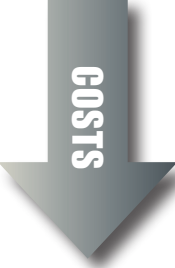

As we discussed in Chapter 2, when you analyze your existing business processes, you first want to focus on tasks that are repetitive and that easily lend themselves to automation. Automating increasingly complex workflow and business processes to perform sophisticated tasks without user participation frees up resources and allows your business to focus on higher-value tasks for which human input and interaction is crucial.

Studies have shown that as many as 55 percent of organizations find their IT systems not sufficiently flexible, and 44 percent think their systems are neither adaptable nor very well integrated.¹ Furthermore, a vast majority of companies have made changes in the past two years aimed at making their business processes more efficient; and they have made IT investments to make systems more integrated, responsive, flexible, and adaptive. BPA solutions are ideally suited to address these challenges, as BPA allows organizations to automate and optimize workflow processes through an integrated environment that supports all phases of business operations. The best BPA tools save time and effort by supporting a teamwork approach and offering high-level process design that can be easily implemented without programming.

1 "Business Process Automation and Workflow" PowerPoint presentation by Glen Bryant. PMP Research, 2004. Retrieved online at www.aiimhawaii.org/bpawf.ppt

Evaluating Suitable Processes for the BPA Approach

Before identifying processes or individual tasks to include in your BPA solution, it is a good idea to define the overall goals you expect to achieve through BPA. Your goals chart might look something like this:

| | | |
|---|---|---|
|  | Reduce complexity and errors |  |
| | Tighter integration of IT and business processes | |
| | Improve delivery under SLAs | |
| | Improve reporting capability | |

Next you should identify the individual processes or tasks to be included in the BPA solution. Suitable candidates for BPA could include any of the following:

- Repetitive, manual tasks
- Tasks that are duplicated in other processes
- Inefficient or outdated workflow processes
- Processes that span geographical boundaries
- New business or IT initiatives

You may also want to start with BPA solutions that deliver maximum value to the highest level business targets. For example, you may want to use BPA to streamline the order entry process before using it to optimize IT infrastructure.

Good BPA tools allow you to design solutions around business logic, workflow logic, or even simple task sequencing. For higher level business processes, BPA solutions should be designed in a graphical environment that abstracts workflow logic from implementation details.

Getting Buy-In

Justifying the value of a particular IT project to management is always a challenge, and selling your BPA project won't be any different unless you have a good plan. Organizations often tend to see IT efforts as separate from the overall strategic agenda, so to succeed you must educate and get buy-in from as many participants as possible. Developing a strategy that includes both IT and business can make the difference between success and failure. Good BPA tools are excellent for bridging gaps between IT and business; these tools allow IT and business to collaborate in the creation of new workflow processes or in re-engineering processes or tasks that may be causing bottlenecks in important operations.

If the plan is already underway, some kind of buy-in from the executive level probably already exists because top managers have come to realize the value of BPA to the organization.

When approaching management, keep in mind that business managers are typically interested in what BPA can do for the bottom line: How much money will be saved? How soon? And what is the ROI?

Moreover, you also will need to sell BPA projects on different levels throughout the organization. Middle management and employees often feel threatened by change, especially change that involves their assigned tasks; therefore, the project manager needs to involve all parties to sell the project. Your team will need to educate middle managers on benefits such as increased efficiency, reduced errors, and better delivery on Service Level Agreements (SLAs). You should inform employees early on about what automation will mean for their particular jobs. A 20-60-20 split is common among staff when it comes to implementing changes: 20 percent are on board, 20 percent are totally not on board, and the remaining 60 percent are on the fence. By using the first 20 percent as “cheerleaders” and presenting a stellar plan for implementation, you should be able to convince the 60 percent block that BPA is good for everyone, and eventually you will have a solid majority buy-in from the organization.

It is important that all parties, from the CEO on down, see the personal benefits as well as the benefits to the organization. The BPA project manager needs to focus not only on the mechanics of the changes a BPA solution may bring about, but also on the employees who are involved in the process. You may have to address resistance that arises from fears that automation may result in job losses. While BPA may in fact eliminate redundant FTE's, in many cases it simply means that employees once tied to repetitive processes become more productive and involved in tasks and decision-making more critical to the organization. In these cases, BPA actually results in increased job security. A clear demonstration of the benefits to all will result in a smoother process for everyone.

Design

As you design and implement your BPA solution, you'll want to keep several key factors in mind. Business managers are encouraged to design their new processes with a positive attitude toward BPA, and to consider BPA technology as an enabler rather than a limiter in achieving overarching business goals. Entrenched infrastructure is often the reason for the archaic, inefficient, and costly processes to begin with.



It is always easier to backtrack from an optimal process design than to incrementally improve a suboptimal one.

Before you design new business processes, it is important to evaluate and select the proper tools to automate workflow processes. There are currently several good products in this segment, and, once again, several factors to keep in mind when you are evaluating BPA solutions.

- Look for a solution that provides a complete platform for developing automation applications and allows for deployment across the entire enterprise or supply chain.
- A best-of-breed BPA solution should eliminate the need to write code from scratch and instead offer a GUI-based development interface or scripting environment that is feature-rich and flexible.

- A good BPA tool enables IT developers to create sophisticated automation applications in a universally understandable scripting language, thereby removing the problems often associated with managing custom applications.
- Select a BPA product that spans all phases of the automation lifecycle, including development, deployment, and management.



Selecting the right technology is a critical step.

To ensure an optimum BPA solution, other key factors to incorporate into the design and implementation process include collaboration, centralized control, and process integration.

Collaboration

Collaboration is important to the success of any workflow process that ultimately benefits more than one group. Collaboration by definition involves more than one team and accepts input from diverse disciplines. However, in the context of designing workflow processes, some observers have noted that IT and business seem to speak a different language.² Business managers may think that IT lacks an understanding of business strategy; whereas IT managers may find it frustrating to explain IT initiatives in language that business executives can relate to. In any event, collaboration failures are costly to the organization not only in monetary terms, but also in loss of goodwill with users and trust among project contributors.

The good news is that the right BPA platform can effectively bridge the communications gap between business and IT. Good BPA tools provide a high-level, GUI-based design environment that greatly simplifies the process of designing BPA solutions, without requiring any knowledge of programming. This common, integrated design environment encourages participation and results in a better BPA solution overall.

Centralized Control

A BPA solution should allow for centralized IT management, deployment, and storage, including the capability to visualize the business processes and receive real-time notifications and performance reporting. With a centralized view of the automation processes, IT can respond quickly and proactively to any problems within the workflow process.

Process Integration

Process integration is commonly used to streamline the execution of a series of tasks to provide improved end-to-end processing from inception to completion. The primary motivation for process integration is usually the desire to improve a business process and use existing tools more

² "Are CFOs from Mars and CIOs from Venus? Overcoming the perception gap to enhance the finance-IT relationship," CFO Europe Research Services and PricewaterhouseCoopers, report published in 2008.

efficiently. BPA tools lend themselves to the support of process integration because they allow for the improvement of transaction-oriented business processes.

Most business processes consist of numerous subprocesses. Achieving tighter control and integration of these subprocesses is the key to process integration under BPA. BPA allows organizations to achieve better optimization of workflow processes by analyzing each component as a part of one or more higher-level processes within the organization. The capability to maintain business processes independent from the implementation of each individual task or operation can reduce individual skill-set requirements for personnel who maintain the process definition. As process management becomes more centralized under BPA, information that spans multiple processes can be extracted and condensed into better reports, thus allowing managers to make more informed business decisions. It is important to keep in mind that a properly designed BPA solution may prove difficult to implement using traditional programming tools. Traditional tools frequently lack the ability to execute parallel tasks, set up synchronization points, and provide for escalations. It is therefore important to select a BPA platform that provides the full range of capabilities needed to implement best practices BPA solutions.

Deployment

When you have completed the design and development phase, it's time to design and implement a test plan before you roll out the new BPA solution. An effective plan must incorporate a realistic test environment, allow for adequate testing time, and contain a good contingency and roll-back plan to deal with unforeseen events.

Testing Your BPA Solutions

Capacity and performance planning is an important step that even the best BPA planners sometimes miss. A new application that runs flawlessly during the prototype phase can still bog down in production. Therefore, it makes sense to test in an environment with conditions as close to real as possible. This means if the process is meant to handle 100,000 orders a day, create a test environment that allows or simulates testing with that amount, plus a comfortable percentage to allow for growth.

The goal of testing should be to validate the design. So instead of spending the whole test cycle executing redundant tests that consistently yield a pass result, your BPA team should also design tests that will trigger "boundary conditions" that are more likely to uncover a design or scripting problem. When you are automating workflow processes, be sure to include checks and balances at key points in the newly automated process to compensate for points in the process that used to be monitored manually.

Make sure the deployment phase includes enough time for testing, and be sure to recruit users or at least people outside the development process who can bring a more objective view to the testing process. Developers may not be the best testers of a BPA solution because they tend to know intrinsically how to navigate the solution without generating errors.

Finally, what often separates rookies from pros in BPA rollouts is the level of contingency planning. Have a good rollback plan to deal with any unexpected challenges that arise when you're rolling out your new BPA solution. It may be necessary to resort temporarily to the prior environment to allow for additional debugging or to fine tune the new BPA solution.

How do you know when you've done enough testing? The answer is different for every BPA solution; but generally speaking, the release criteria should be based on a series of predetermined conditions or milestones. Once the application has successfully passed these milestones, it should be ready for use in production.

Rolling Out Your BPA Solution

When you deploy any new BPA solution, the key to smooth rollout is to put together a phased implementation plan. A rollout plan should contain items such as detailed hardware, software, and configuration requirements, predeployment checklists, training and documentation, and post-rollout feedback and follow up.

Before deployment, make sure that the production environment—e.g., network servers, storage, utilities, and other software—is set up to accommodate the new BPA processes. Develop and follow predeployment checklists and procedures. To maintain goodwill with non-IT staff and end users, BPA teams should work with business managers to schedule phased rollouts of each BPA solution. Using a pilot group comprising users from a cross-section of the enterprise in the first phase can provide a smoother transition from testing to full production.

Training is also important; without proper training, users who do not understand the new process can quickly derail its success. From a strategy perspective, consider training pilot users first. Well-trained pilot users assist in training other users as they are brought on board. Finally, be sure to measure results against the stated goals and milestones created at the outset, so you have a metric for determining success.

Properly designed and tested BPA solutions can quickly start improving response times and producing more effective and efficient workflow processes throughout the organization, thus reducing costs. The success of one BPA solution often paves the way for additional automation solutions. Choosing the correct BPA platform will ensure that as your needs expand, the solution will expand with it. In the next chapter we look at some real-world examples that demonstrate how the right BPA tools can aid in the design and deployment of the most effective BPA solutions.