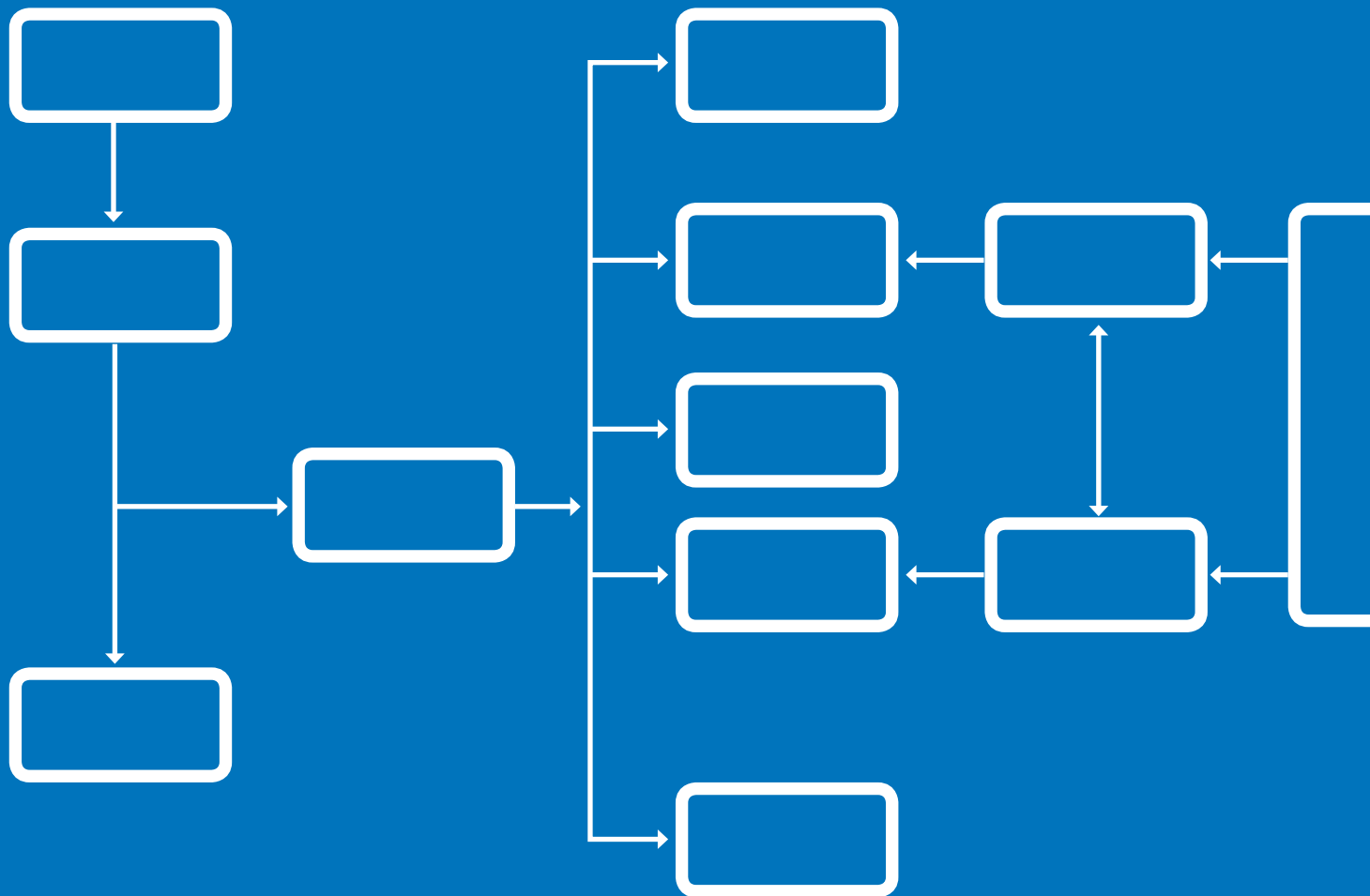


How to Take Business Process Modeling to the Next Level

Based on Real User Reviews of IBM Solutions



ABSTRACT

Business process modeling is an early, critical step in orchestrating the business systems that execute business processes. Maturity levels in business process modeling range from paper and ink to the use of highly-sophisticated modeling software. Each organization has to determine what will work best for its level of process modeling maturity. However, given how most organizations want to move up the maturity scale in process modeling, the best practice is to work with a modeling tool that is sophisticated, yet easy to use—and one that can enable increasingly advanced functionality over time. What's the right choice? This paper offers insights from IT Central Station members who adopted IBM Blueworks Live. Based on their reviews, it explores how factors like collaborative capabilities, version control, process repositories and integration potential drove their decisions.

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INTRODUCTION

Accuracy and thoroughness are critical to success with business process automation. Automating processes that are not well understood, contain errors or hidden gaps inevitably leads to problems. Whatever flaws there were in the process before automation become more pronounced afterwards. To avoid this difficulty, organizations interested in business process automation should first discover processes and ensure their accuracy using a technique known as business process modeling. Process modeling is an approach non-technical businesspeople can use to work across departments to visualize and understand their “as-is” process landscape.

Approaches to process modeling range from legal pads to spreadsheets to the use of highly-sophisticated modeling tools. The more automated and repeatable the modeling process, the higher an organization’s level of process modeling maturity will drive their choice of tool. However, most organizations want to move up the process modeling maturity scale. As a Director at a small retailer on IT Central Station put it, “We were using a previous [process modeling] solution, [it was called ‘paper and ink.’](#) So we needed to use

something slightly more, well, less 19th-century and slightly more 21st-century.”

To upgrade the process modeling experience, the best practice is to work with a modeling tool that is easy to use but enables increasingly advanced functionality as needed over time. What’s the right choice? This paper offers insights from IT Central Station members who adopted IBM Blueworks Live for process modeling. Based on their reviews, it explores how factors like collaborative capabilities, version control, process repositories and integration potential drove their decisions.

A brief note on acronyms: Both business process modeling and business process management are referred to as BPM, which causes confusion when discussing modeling. The two concepts are related, of course. Process modeling is a step in the higher-level work of process management. IBM also has a product called IBM BPM, which does business process management. To keep things clear, however, this paper will therefore not use the BPM acronym.

Understanding Business Process Modeling

A business process comprises a set of related, structured activities that realize a given business goal. A simple example shows up in the process of generating an invoice. The process starts with pulling up the customer's account record in an accounting system and continues through calculating the amount of money they owe, creating the actual invoice, converting it into a PDF and then emailing it to the customer. Each step, in turn, invokes a process in an underlying software application. Mapping this workflow graphically creates a visual process model, as depicted in Figure 1.



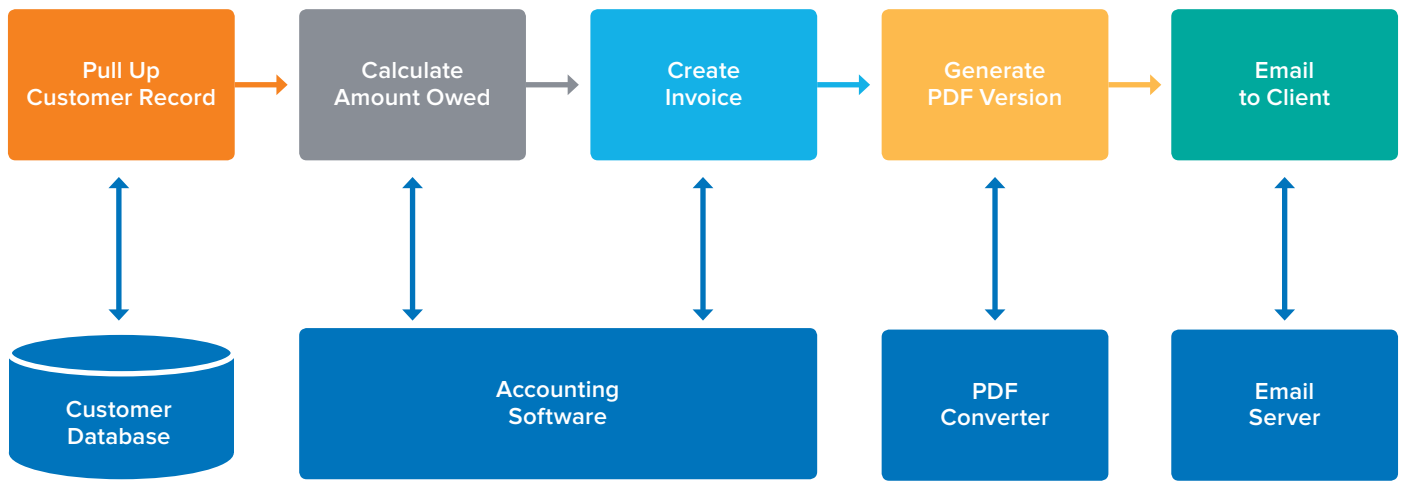


Figure 1 - Example of business process model for generating and emailing a customer invoice

This is a simple example meant to illustrate the concept of process modeling. In reality, processes can be highly complex. A process modeling solution enables business analysts to identify process steps and put them into an orderly sequence. It establishes links between process steps and software functions. Process modeling helps as organizations seek to automate process. The modeling solution facilitates the orchestrated steps between process tasks and software procedures.

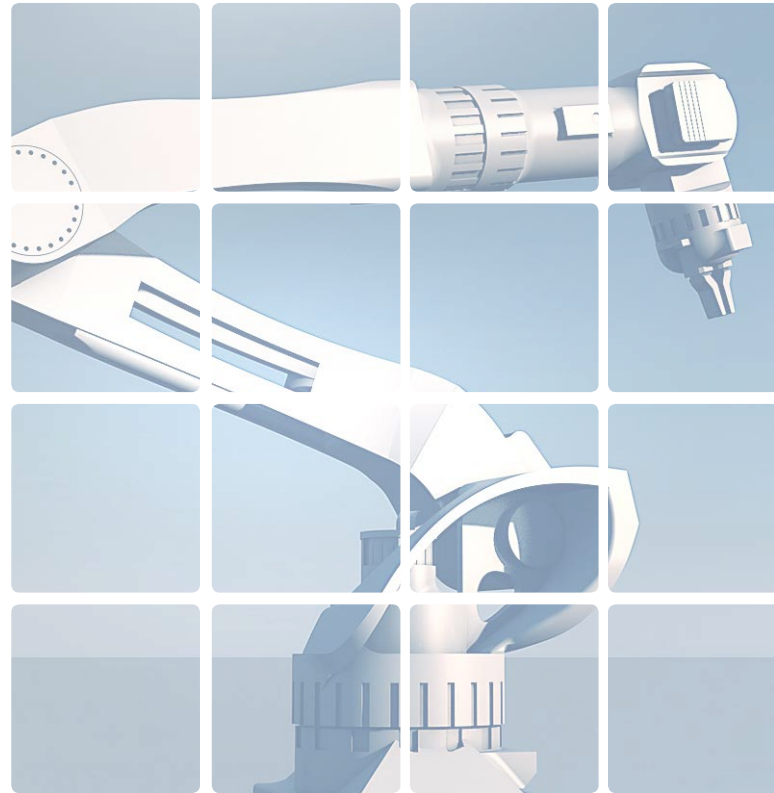
IBM Blueworks Live

IBM Blueworks Live is a business process modeling solution. It is designed to help organizations discover business processes and then document them in a collaborative fashion across multiple stakeholder groups. Blueworks Live is considered intuitive to use, but it is still capable of implementing complex process models. It supports the popular Business Process Model and Notation (BPMN) 2.0 standard. BPMN establishes a uniform standard for graphically representing business processes in a model. The standard was developed by BPMN.org, which maintains it as well.



Business Process Modeling Use Cases

IT Central Station members employ IBM Blueworks Live for a variety of use cases. For instance, a Head of Process Innovation and Robotic Automation at a tech services company with more than 1,000 employees said, “We have been using it mostly [as an end-to-end enterprise transformation tool](#). We start with our discovery workshop and Blueworks Live plays a key role. We use this tool to discover processes, analyze those processes, and define them from a tool set perspective: Whether the process should go into IBM BPM [IBM Business Process Manager] and IBM ODM [IBM Operational Decision Manager], cognitive, IAB, etc.” IBM BPM and IBM ODM are software products that take care of managing business processes and orchestrating the underlying software functions that enable the processes to work.



An Architect at a healthcare company with over 500 employees shared, “We are using the product as a [process mapping tool](#) and as part of a larger process improvement project. We use it with IBM BPM and IBM ODM. We get an automated workflow solution for our customers, an improved workflow automation. We’re helping our business.” The Director at the small retailer uses Blueworks Live for [real-time modeling](#) and design work.

A VP Client Services at a small tech services company explained, “I don’t think that there is another product out there [quite like it](#). There are some competitors certainly, but they are either more complex, costly, or too simplistic and not geared towards process documentation.” The

Director at the small retailer offered the insight, “When selecting a vendor, what’s important is a vendor that understands and is able to provide a [clear solution](#) for the problem that’s in front of us. In this particular instance, it was an answer to a question we didn’t even know we were asking.”

Fleshing out this comment, he added, “We had what we thought was our set of requirements, and then we found we actually had a different set. Meaning, we had that first set of requirements and then some others. We were able to not just take one step but take several steps at once. So, having a vendor that understands the problem and is able to deliver the answer is important.” Ultimately, this user found that Blueworks Live improved the way his organization functions.

Drivers of Preference for a Solution

What makes users choose one process modeling solution over another? IT Central Station members weigh in. They discuss the value of collaboration capabilities, version control and process repositories. The ability to integrate process modeling with other tools also emerges as a driver of preference.



Diverse Stakeholder Collaboration

Done right, process modeling should involve multiple people, often from different parts of an organization. While the IT department may have to implement the process model, it is usually the business stakeholders who have the best understanding of the process itself. Figure 2 shows a representation of these connections between stakeholder groups. As the Head of Process Innovation and Robotic Automation noted about Blueworks Live, “[It’s intuitive](#), and it connects really well with business teams.”

He further noted, “We utilize the [collaboration features](#) of this solution, such as editing pathways and uploading documentation. When the process is published, there are multiple people using the same process. This has become a key goal from the tool’s perspective.” He further commented on why this matters, saying, “Collaboration is key. Therefore, you don’t have a document sitting on a shelf for multiple years with nobody looking at it. It is a live document. Whatever you have, it is live and accessible to everyone.”

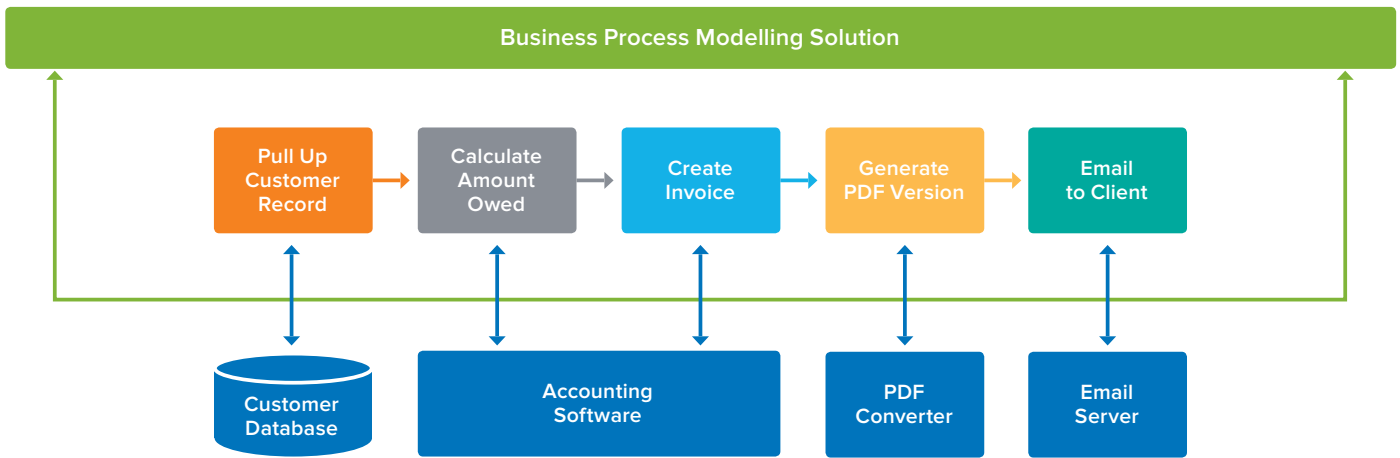


Figure 2 – The ability to facilitate collaboration among stakeholders is a driver of preference for a process modeler

The Director at the small retailer explained how collaboration works with a process modeling tool. He said, “In terms of the collaboration features, from the point of [discovery](#), it was useful to go to load up the policies and the rule sets that the client had. And in terms of exploring options and being able to model a variety of different processes, that was incredibly useful as well.”

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The Architect at the healthcare company uses Blueworks live for [discovery workshops](#) and collaborative sessions with customers. He described the solution as “very collaborative,” noting that “business users understand it really well, which means we can then help them automate their business processes.” His team uses the solution for creating both the “as-is” and

the “to-be” business process model. He shared that he has recommended Blueworks Live to many people, for collaboration.

Version Control Functions

A process modeling solution should adeptly handle multiple versions of business processes, according to Blueworks Live users. The Head of Process Innovation and Robotic Automation put it this way: “[My first process model](#) had 142 activities. This is humongous from a single process perspective. To model, it took us three days to complete. It [Blueworks Live] helped with our process version control issues. A Technical Lead who uses IBM ODM at a large healthcare company offered a similar perspective. (ODM has some process modeling features.) He said, “With ODM as a [centralized rules engine](#), it’s easy to track. You can version the rules in the ODM engine itself.” He noted, though, “It’s always better to decentralize the rules.”

A Central Process Model Repository

Process modelers do best when they enable productivity among their users. Having a central repository for business process models helps achieve this goal. As a Risk Manager at a financial services firm with more than 1,000 employees explained, “We [upload all our policies](#) into Blueworks Live. It’s used throughout the business for audit purposes and for backup purposes for employees.”

The Head of Process Innovation and Robotic Automation said, “We use a [document repository](#). There are multiple places for how we upload documents, either by going to a dashboard interface or by taking pictures/screenshots that can be put in the documentation tab. It goes into the file management of Blueworks Live. You

can review them later, clean them out later.” The value, according to him, is that, “You have one single source where you have lots of documents which are used across multiple processes. Everything’s stored there. It helps in that way, making it lean and having your documentation updated.”

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The financial services Risk Manager similarly noted, “For me the most valuable feature is that it’s [one depository](#) for our bank. So it’s not like everybody has their critical processes on SharePoint or on their desktops. Everything is centrally located. It’s very intuitive, easy to use.”

Integration with Other Systems

By design, business process modeling solutions are never supposed to be standalone systems. They have to integrate with other software applications and be compatible with multiple formats and devices. The better this capability is, the more favorably users will look upon it. In this context, a Data Manager who uses IBM ODM at a large transportation company shared, “We have [integrated](#) this solution with other solutions. It was very easy to do, once we had a base to work with.”

The Risk Manager at the financial services shared, “So what we did was we worked with IBM and we worked with our IT people, and now [we’ve integrated](#) so that we have to be actually logged in to our Citi mainframe in order to get into Blueworks Live. So that’s one good thing about it.” The VP Client Services at the small tech services company has integrated his solution with [QuickBooks and Salesforce](#).

Being able to work across formats is also helpful, as the VP Client Services at the small tech services company observed. He said, “It [Blueworks Live] has the ability to [document in different formats](#). It is not tied to a specific model. You can look at it from different angles and see the intuitive nature of it. It always generates a valid diagram. You cannot create something that is not BPMN compliant.”

Another user, the Head of Process Innovation and Robotic Automation, valued Blueworks Live’s multichannel capabilities. He said, “You can use it [from your mobile device](#) or you can be on the desktop. It doesn’t matter. You are always connected. It is cloud-based, so you don’t have to install anything. People don’t have the hassle of installing, then updating, etc. It’s always on the fly available for you on demand. This becomes key, and it is a big differentiator.”

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Users also praised Blueworks Live’s ability to integrate with related solutions in the IBM Business Process Management portfolio. The Head of Process Innovation and Robotic Automation noted “Since it is [integrated with IBM BPM](#) it [Blueworks Live] helps me import the process, making sure the business is always connected. This helps during the UAT phase because it becomes easier to clean the business process model in Blueworks Live, [and] then fitting it on a process which is in IBM BPM or a rule which is in IBM ODM.”

CONCLUSION

Moving up from pen and ink or process modeling tools with limited functionality means looking for a solution that enables effective collaboration. As IT Central Station members who adopted IBM Blueworks Live explain, the right process modeling solution also allows for version control and includes process repositories. The solution should also integrate with other systems, which is a natural part of the overall process modeling and process management workload. With the right process modeler in use, organizations can move ahead with modeling, automating, orchestrating and managing their business processes.

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Blueworks Live is cloud-based software that gives you a dedicated, collaborative environment to build and improve business processes through process mapping. Business analysts, subject matter experts and any other designated editors or contributors can easily work together through an intuitive web interface, documenting and analyzing processes to make them more efficient. And because it's in the cloud, there's nothing to download, it's accessible anywhere and you have a single location for all business processes to live.

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