Contents

Customer Relationship
What to do? Why do it? How to do it?

Internal Efficiency

Skills & Resources?

Organization al Change

IT-Dept?

IT Provider & Evaluation

Make or Buy?

Provider Relationship

Do we really need this?

Examples/Cases

Rumors, Hype, Fashion

Which Parts/ Functionalit?

Explain & define "Workflow"

Cases

What's in for me?

Make or Buy textbook

Make case Buy case Adapt case

Strategic or not?

Workflow Scoping

BizProcs

Workflow Design

Resources

Eval Matrix
Why These Slides?

Do we really have to go through this?

- Reason #1: Understand ROI
- Reason #2: Don't leave it to the Techies!
  (I'm a techie!)
- Reason #3: Know What You're Doing
Reason #1: Understand ROI

The negative cash flow (investment) depends on which workflows to implement and how.

The amount of the positive cash flow depends on the gained efficiency.

Source: Strategic Issues in Managing Technology and Innovation, Anthony F. Chelte, Western New England College
Reason #2: Don't leave it to the Techies

Stake Holders

- CEO
- Dept.
- Client
- Analyst
- PM
- Dev.
- User

Spheres

- "Emotional"
  - "How can we get rid of all this task crap?"
- "Logicians"
  - How to use "logical tools" to analyze the "human issues"?
- "User"
  - How to do the work?

Text & Analysis: http://www.fawcette.com/interviews/beck_cooper/
Figure: ]project-open[, own elaboration, http://www.project-open.com/whitepapers/
Reason #2: Don't leave it to the Techies

The PM is the (only?) conflict mediator.

Text & Analysis: http://www.fawcette.com/interviews/beck_cooper/
Figure: http://www.project-open.com/whitepapers/
Reason #3: Know What You're Doing

- Technology is fashion business – it changes every 3-8 years
- "Hypes" usually take a lot of attention
- Most hypes contribute something, and leave their trace in the industry.
- Some don't.

Source: http://www.jboss.org/products/jbpm/stateofworkflow
Business Processes

What's a Business Process?

A business process is the flow or progression of activities [...] each of which represents the work of a person, an internal system, or the process of a partner company [...] toward some business goal.

Mike Havey

A sample Business Process in BPMN (Business Process Modelling Notation)

Source: project-open[, own elaboration, http://www.project-open.com/whitepapers/]
Business Process Elements

- "Event"
- Gateway
- Activity
- Artifacts (Documents)
- Sequence Flow
- Document Flow
- Message Flow

A Very Simple Invoice Example

- Business Process Modeling Notation (BPMN)
- Designed to be understood by business users

Source: project-open[. own elaboration, http://www.project-open.com/whitepapers/]
Invoice Example (3)

Source: [project-open[, own elaboration, http://www.project-open.com/whitepapers/]
Successful Negotiation? No

Modify Quote

End Source

Sample Flash L10n Process

Start

Initial Contact

Initial Analysis

TM Analysis

Quoting

Customer Negotiations

Successful Negotiation?

Quote

Modify Quote

Yes

End

Instructions

Source Flash

Text File(s)

Wordcount

L10n Report

L10n Kit

Trans

Translation

Edit

Edit

Integration

QC

QC

OK?

## Business Process Description Languages

<table>
<thead>
<tr>
<th>Standard</th>
<th>Organization</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Process Execution Language (BPEL)</td>
<td>OASIS</td>
<td>Execution Language</td>
</tr>
<tr>
<td>Business Process Modeling Notation (BPML)</td>
<td>BPMI</td>
<td>Execution Language</td>
</tr>
<tr>
<td>Business Process Modeling Language (BPML)</td>
<td>BPMI</td>
<td>Administration and monitoring interface</td>
</tr>
<tr>
<td>Business Process Semantic Model (BPSM)</td>
<td>BPMI</td>
<td>BPEL extension for transactions, human workflow, business rules</td>
</tr>
<tr>
<td>UML Activity Diagrams</td>
<td>OMG</td>
<td>Notation language</td>
</tr>
<tr>
<td>Workflow Reference Model</td>
<td>Workflow Management Coalition (WfMC)</td>
<td>Architecture</td>
</tr>
<tr>
<td>XML Process Definition Language (XPDL)</td>
<td>WfMC</td>
<td>Execution language</td>
</tr>
<tr>
<td>Workflow API (WAPI)</td>
<td>WfMC</td>
<td>Administration and monitoring, human interaction, system interaction</td>
</tr>
<tr>
<td>Workflow XML (WfXML)</td>
<td>WfMC</td>
<td>Choreography (or similar to it)</td>
</tr>
<tr>
<td>Business Process Definition Metamodel (BPDM)</td>
<td>OMG</td>
<td>Execution language and/or notation language, as MDA metamodel</td>
</tr>
<tr>
<td>Business Process Runtime Interface (BPRI)</td>
<td>OMG</td>
<td>Administration and monitoring, human interaction, system interaction, as MDA metamodel</td>
</tr>
</tbody>
</table>

Workflow Engine

Workflow Process Elements

- "Event"
- State
- Gateway
- Activity
- Artifacts (Documents)
- Sequence Flow
- Document Flow
- Message Flow

Invoice Example (2) With States
State Diagram / Petri Net

Source: [project-open[, own elaboration, http://www.project-open.com/whitepapers/]
What's the difference?

- The "State" concept allows your IT guys to put this description into a computer system (specification)
- "States" won't work in high-level process designs. It forces the business analyst to get down to "reality"

Status Engine Example

- The diagram shows a status engine according to the business process that we have defined before.

Source: [project-open], own elaboration, [http://www.project-open.com/whitepapers/]
Let's imagine we really want to implement this workflow using a Workflow application:

- Should we allow the Accountant to reset the invoice status to "generated"?
- Should the accountant be able to skip the invoice? What will happen to the $$$?

Source: project-open[, own elaboration, http://www.project-open.com/whitepapers/]
Further Questions

- Should everything be allowed ("collaboration style")?
- When?
- Why not?

Source: [project-open], own elaboration, [http://www.project-open.com/whitepapers/]
Waiting for Money

Money Received

Invoice Generated

Start

Invoice Unpaid

Money Received

End

Workflow Design
"Fine Grain" or "Coarse Grain"?

To what degree should a company enforce the order of steps and the assignment of tasks of a process?

- Small Company:
- Company specialized on Flash:
- Your Company: ???

"Fine Grain" or "Coarse Grain"?

- Workflow implementations behave like other IT investments
- Fine grain workflows have higher initial and setup overhead costs
- The optimum granularity depends on many factors

Source: [project-open](http://www.project-open.com/whitepapers/)
Process Implementation Styles

- "Email" Style
  - No workflow at all, documents are sent around by email
  - Pros: Flexible, no investment, "ad hoc"

- "Collaboration" Style
  - Online Forums, common file storage, ...
  - Pros: Flexible, low investment

- "Organizational" Style
  - Fixed process, but order is maintained informally.

- "Prescription" Style
  - Formal workflow
  - Pros: Formalized, Standardized, Reporting & Metrics, ...

Source: project-open[, own elaboration, http://www.project-open.com/whitepapers/]
Workflow design takes a Business Process and creates an IT application from it.

- "Fine grain" or "coarse grain" implementation
- Email, Collaboration or Prescription style implementation?
- Short or long-lived processes?
- Reporting & Workflow Metrics
- Flexibility
- Security & Permissions
- "Trust Model"
- "Water-tight" processes vs. Human Decisions?
- Bottom-Up or top-down design?
End

Frank Bergmann
frank.bergmann@project-open.com
www.project-open.com