

Human-Centric BPM Selection Checklist

Human-centric features, now widely available in business process management suites, can greatly enhance BPM initiatives. Here are five key considerations for finding just the right mix of human-centric capabilities to meet your organization's needs. **BY ALAN EARLS**

INSIDE:

- Automation vs. human input
- Configurability
- 'Red-flag' capability
- Process visibility and evaluation
- ROI



BPM Selection Checklist

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HUMAN-CENTRIC BPM was born a few years ago as analysts struggled to sort out competing BPM products and identify significant software characteristics. At that time, human-centric BPM tended to stand apart from other kinds of BPM applications.

Today, though, some human-centric characteristics are built into most BPM suites, notes Derek Miers, a principal analyst with Forrester Research. However, that doesn't make those characteristics less important. In fact, making sure that you've selected a suite that provides the right human-centric characteristics can have a significant impact on how well your BPM initiative functions.

Following are five considerations

for selecting a BPM suite with human-centric features:

1 AUTOMATION VS. HUMAN INPUT
Miers defines human-centric BPM broadly, as involving everything that people need to accomplish to do their jobs. For instance, even processes that are almost completely automated, such as clearing check payments, often still require some human input and decision-making to handle the exceptions that inevitably crop up.

Consultant Troy Bitter agrees. "Even if you have an assembly line, not everything is automated," says Bitter, a senior practice lead at the Cohesion Business Technology con-

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sulting firm. “So you must optimize not just for the manufacturing method, but also for the people.” With a human-centric approach, you can set up mechanisms for communicating when decisions need to be made about changing processes, he continues. “That’s information that people can act on so that everything runs smoothly.”

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BOTTOM LINE: Automation can’t encompass everything. Human-centric BPM can fill the gaps. Choosing the right BPM tool involves knowing what’s needed where.

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2 CONFIGURABILITY
BPM also serves as an organizational change agent, encouraging the business to look at itself in a different light, Bitter says. For instance, rather than considering itself a medical-device manufacturer, a company might view itself as a company that saves lives through medical devices. “This kind of a fresh approach opens the door to thinking differently,” he says. “It allows everyone to begin to ask how to improve, how to remove the waste from the business and how to do continuous improvement to drive the business to be more repeatable and predictable.”

As an example, he describes this experience at a financial-services company where he previously worked: “We discovered that some of our key documents—pieces of paper—were

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traveling two miles within our building as they were examined and approved,” he recalls. “By redesigning the workflow and [changing] where people involved in different functions were seated, we were able to reduce that dramatically.”

In another example he encountered, a company’s managers noticed that a warehouse worker was bringing a child’s wagon to work. When asked about it, the worker explained that by using the wagon, he could avoid making multiple trips to the same bin because he could carry more items on each trip. That insight led the company to similarly equip other warehouse workers, improving productivity. “Our mantra is to always start with the physical world, before we think in terms of automation,” Bitter notes.

That recognition—that BPM must adapt to and support the physical world—means that configurability should be the first consideration in looking for a BPMS that can support human-centric approaches.

“But that can be a two-edged sword,” Bitter cautions. For instance, he notes, flexibility can be very helpful for a bank working with Roth IRAs when, say, legislation changes the age limits on contributions or disbursements. With configurability, the bank’s staff can alter a Roth product or its description—ideally, without requiring that the IT staff get involved

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in that reconfiguration.

On the other hand, in an auto-insurance scenario, a large insurer might want the ability to tailor claims processes to mesh with the regulations in each of the 50 states. "That can be great, but that's also an example of how it can be easy to overcomplicate something," notes Bitter, adding that a human-centric approach would leave some state-by-state discretion to individual claim-handlers. Ultimately, "you need to find the right degree of flexibility

without building something that is just too complicated."

BOTTOM LINE: Human-centric BPM tools need generous configuration capability to enable innovation, agility and transformation.

3 'RED-FLAG' CAPABILITY
Another key element in a human-centric approach to BPM is providing the ability to implement what Bitter calls "red-flag" mechanisms. "You must be able to look at a

Human-Centric BPM: Five Factors at a Glance

- ➊ **Balance automation and human involvement.** The key is knowing which is needed at every stage and step.
- ➋ **Go for flexibility.** Human-centric BPM tools should allow configuration. Without it, responsiveness to change and the ability to innovate will suffer.
- ➌ **Seek "red-flag" capability.** Human-centric BPM should be able to identify events or activities requiring a person's attention or intervention.
- ➍ **Prioritize visibility and evaluation.** Human-centric BPM should spotlight processes that aren't working and lead to increased agility in the rest.
- ➎ **Consider ROI.** But keep in mind that while human-centric BPM can certainly generate significant benefits, specific improvements are sometimes tough to predict or quantify. —A.E.

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process and, if things aren't flowing as you planned, you need a way to communicate that fact and take action," he says. One common example of a red flag occurs when a manufacturing operation hits its minimum stock level. That's an event that should trigger replenishment activi-

If a process isn't working, human-centric BPM should be able to quickly spotlight the failure, not conceal it.

ties, usually with some degree of human oversight.

Human-centric features should also include the ability to identify trends and provide people with options for making appropriate decisions, Bitter says.

"If your BPMS can do these things out of the box in an automated way, that is a positive," he says. "Look for products that provide flexibility and offer features that are common to your industry so that you can customize where you need to, but you don't have to reinvent the things that are universal."

BOTTOM LINE: For maximum effectiveness, human-centric BPM tools

need options for spotting anything that needs—or potentially needs—the human touch.

4 PROCESS VISIBILITY AND EVALUATION

Bitter points out that in the software world, practices such as Lean and Agile embrace continuous improvement, relying on short cycles with feedback driving adjustments. "Mantras like 'Fail early, fail often,' illustrate a mindset of 'Let's try things and adjust based on the feedback,'" he says.

In developing a human-centric approach to BPM, you may want to evaluate each step before you proceed to the next, much like W. Edwards Deming's "Plan, Do, Check, Act" cycle. Done right, such evaluation "allows the business to be more nimble and less focused on being perfect out of the gate," says Mathias Kirchmer, executive director for BPM at Accenture. Taking this step-by-step approach will make your BPM configuration better attuned to the needs of your business and, again, better able to adapt quickly to changing environments.

BOTTOM LINE: If a process isn't working, human-centric BPM should be able to quickly spotlight the failure, not conceal it. And in processes that *are* working, the human-centric approach should enable increased agility.

- AUTOMATION VS. HUMAN INPUT
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- 'RED-FLAG' CAPABILITY
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- ROI

5 ROI So far we've talked about the technical side of the equation—making sure you've got the right BPMS bells and whistles. But what about the business side? How do you get executive support and a budget?

For maximum effectiveness, human-centric BPM tools need options for spotting anything that needs—or potentially needs—the human touch.

You can always depend on a cost-based approach to provide a conservative and credible view of whether the investment makes sense, Kirchmer says. All that's required is calculating costs versus savings or potential increases in revenue.

But precisely because human-centric BPM can be so empowering, it can generate unexpected, difficult-to-predict benefits. For instance, the approach might lead to improved compliance, better customer relationships or even increased sales—depending, of course, on the specific company, industry and implementation. Such gains can be tricky to fore-

cast and, often, tough to quantify.

Still, at least trying to articulate the benefits can be a worthwhile exercise, helping clarify the reasons underlying the effort. Otherwise, Kirchmer notes, it can be too easy for companies to simply adopt human-centric BPM as just another piece of technology rather than thinking through and taking advantage of its transformative potential.

BOTTOM LINE: When contemplating an investment in human-centric BPM, take Kirchmer's advice: Start by asking "Why?" Then drill down to the potential benefits.

CONCLUSION

Former Forrester analyst Colin Teubner (who began covering BPM in 2003 "when it was just a collection of tools"), notes that BPM—with or without human-centric features—can always be challenging to initiate. For that reason, he recommends stepping back to take a big-picture look at the underpinnings for your effort.

"Companies see building a core competency in BPM as an important thing, but they should plan to engage the help of people who can provide training on things like modeling business processes," he says. That way, they'll have a better chance of properly configuring human-centric elements. ■

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