



# **SharePoint as a Strategic Weapon**

*Beyond Content Management and Simple Workflow*

*BPM Focus White Paper*

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## Paper Executive Summary

Some already see the potential for SharePoint as a strategic weapon. They recognize the capability of the platform to enable collaboration amongst employees as they respond to the varying demands of customers and the market. They clearly see the need to ensure documents and data are managed effectively. But they also see the slippery slope of “SharePoint Sprawl” and the brick walls created by the product’s rudimentary process support facilities.

Under the covers, SharePoint’s reliance on Windows Workflow Foundation (WF) as its process support mechanism severely constrains the platform’s capabilities, inhibiting process architecture and leading to manually coded workarounds, which in turn, drive complexity and increased Total Cost of Ownership (TCO).

Adding a comprehensive SharePoint-oriented Business Process Management (BPM) Suite to the mix solves many of the critical issues associated with widespread deployment of the platform.<sup>1</sup> Having embraced the SharePoint platform, organizations are discovering that, especially from a process point of view, SharePoint leaves a lot to be desired – particularly when compared with specialist BPM tool sets.<sup>2</sup>

The key point is it that it is entirely possible to leverage the best parts of SharePoint – its Content Management and User Interface/Collaboration features – and still benefit from best in class BPM capabilities.

This paper sets out to highlight potential issues for the strategist on the path ahead, highlighting the options, techniques and practices needed to overcome them. We first characterize the strategic goals of organizations and the technology strategies within them and then move on to assess the strengths and weaknesses of the SharePoint platform. We then get into the meat of the discussion, exploring how the firm can most effectively achieve its business objectives and support its business processes by further leveraging its SharePoint investment through the addition of a Business Process Management (BPM) suite.

## ***Strategic Objectives***

Following the financial Armageddon of the last 12 months, executives are under real pressure to improve overall organizational performance (doing more with less, more quickly). At the same time, competitors are evolving, innovating, and adapting ever more quickly. New forms of regulation and compliance are emerging, requiring the creation of more effective governance over operations and decision making. But, ensuring compliance and reducing operational risk must weigh against the need for greater agility and responsiveness to customer needs.

In parallel with this set of organizational imperatives, CIOs have their own priorities. They are looking to drive overall business productivity and reduce cost; strategically align business and IT, while enhancing organizational agility and reducing time-to-market for new products and services. Within the IT operation itself they need to reduce costs while driving better reliability and efficiency. They understand the central role their organization normally plays in helping the business re-engineer and manage its business processes.<sup>3</sup> Indeed, the IT operation is often asked to take responsibility for large-scale Business Process Management initiatives (something they should resist).

In the end, all of these objectives support one central organizational mission – the ability to win, effectively serve and retain customers – something that makes the difference between long-term growth and eventual extinction. Indeed, leading companies understood some time ago that their own functional priorities and tasks were subservient to delivering an effective customer experience. And long term competitive advantage, i.e. something your competitors can not easily copy and that customers' value, implies focusing on the delivery of a superior customer experience. To do this consistently requires strong leadership, a culture of service, empowered people, effective operational support processes and agile systems – all deeply integrated together into a comprehensive whole.

But all of those initiatives rely on an underlying ability to bring people together, helping them to connect and collaborate. And that is where SharePoint fits in – it provides an accessible environment for sharing and collaboration around content. Rather than merely constraining how people work, it enables and supports their collaboration, responding to the needs of customers more effectively. Indeed, if architected correctly, it can link customers and partners into the process itself.

## ***SharePoint the Platform***

If proof were needed of the strategic importance of SharePoint as a platform, just look to the fact that Microsoft generated \$1.3 billion in sales in fiscal 2009, making it one of the company's hottest products.<sup>4</sup> As one of their fastest growing products ever, some pundits predict that sales will continue to grow at 25 percent a year through 2013.<sup>5</sup>

Organizations buy SharePoint because, out-of-the-box, it provides them with the ability to aggregate their information and content, sharing it through a company wide portal, allowing them to then drive day-to-day productivity. They often see it as a single web application, with many optional features. With SharePoint, there are many accessible features that enable end-users to do much of what they need for themselves without necessarily involving IT.

Under the hood, the platform provides a broad set of capabilities to address a wide range of different needs – from document management and simple workflow, to instant messaging and blogging. Of course, organizations could buy best-of-breed products in each category and integrate them together, but integrating these sorts of capabilities is expensive and difficult to maintain in the light of a rapidly evolving technology landscape; far better to leave that to the world's largest software vendor (Microsoft). SharePoint has proven that an 80% fit is "good enough" for most to get started, customizing and extending where needed.

However, while SharePoint appears easy-to-use and accessible for both users and IT, setting up the environment appropriately is far from straightforward. Given that it will only grow as users add more and more applications and types of content, SharePoint requires a degree of discipline to establish the correct policies, ensuring that the needs of the different user constituencies are catered for effectively. Moreover, to really drive productivity, the firm needs to grapple with its business processes, dealing with the subtle intricacies and exceptions that are posed – i.e. engaging business users in making explicit their needs.

Given that it is possible to do just about anything with computers as long as you have people, time and money, the key questions are around what is provided out-of-the-box before you hit a brick wall; and can you avoid writing programs to circumvent the limitations of the platform. It is also important to understand the trade-offs that are made when we write those programs.

## ***Understanding the Strengths and Weaknesses of SharePoint***

Managing SharePoint in a consistent way, making sure that over the years to come it will enable (rather than constrain) adaptability requires careful attention to a number of issues:<sup>6</sup>

**Governance** – While the ease of use and accessibility of the platform enables business people to set up their own sites, site proliferation throughout the firm creates real headaches for cross organizational processes.

- With enterprise licenses becoming the norm for large organizations so-called “SharePoint Sprawl” can lead to 10-20 thousand SharePoint Site Collections and hundreds of thousands of individual sites (if left unchecked). On the other hand, a well designed SharePoint environment for a similar number of users might encompass just 30 SharePoint Site Collections.<sup>7</sup>
- Achieving an effective balance between the number of SharePoint Site Collections and empowering users to make their own decisions is not straight forward.<sup>8</sup> Out-of-the-box, SharePoint’s ability to balance simple collaboration and successful governance (control), is just not good enough. And that is a real problem, especially for large organizations who find themselves struggling to develop and enforce governance models to manage these issues.
- Expertise is needed in many areas to govern effectively. Since content just grows and grows, it is important to develop and enforce retention policies, as well as planning for archive storage and subsequent retrieval.

**Process** – SharePoint itself relies on an underlying process technology from Microsoft called Windows Workflow Foundation (WF).<sup>9</sup> There are a number of issues associated with the SharePoint perception of Process:

- These “Workflows” are either screen flows (used within an application), or they tend to operate as reporting points for a process that sits in the heads of the end-users – i.e., they don’t tend to drive the work itself, instead they merely report on its change in state.
- While developing processes in the SharePoint Designer is a little cumbersome, more importantly, WF processes are limited to the boundaries of the SharePoint Site Collection. As a result, WF workflows really struggle where cross-organizational processes involve different parts of the organization. For example, a compliance process within a financial services firm would need to cross all departments (both local and remote), potentially spanning Site Collections. To get around this, organizations find themselves developing custom/proprietary code, making applications brittle and presenting new challenges on platform upgrades.
- Without writing code, it is virtually impossible to address complex processes that require parallel processing, multiple threads of execution, etc. The process patterns supported by WF are limited to “sequence” and “state machine.” While these two patterns are common, they cannot adequately reflect the rich nature of work in the real world. For example, without writing workarounds, it is virtually impossible to achieve simple roll-back. Roll-back is where the user has realized they have made a mistake and want to go back to the previous step. Similarly, problems would be encountered if a document required three levels of approval and the third person wanted to refer that document back to the first approver rather than the original author. Indeed, virtually any sophisticated exception handling or business rule requires detailed coding, which creates new brick walls further down the road.
- WF processes are themselves a compiled form of process model – effectively they are C# executable programs. As a result, it is impossible to adapt or change a process at runtime if needed. Run time adaptability is needed to handle unforeseen customer demands or deal with an exception that might result from a change in regulations. Of course, existing cases of work are subject to the change in regulation and it may not be possible to kill the work item and start again under a new process. For example, in our compliance process, when the prevailing rules change (as they inevitably will), existing cases will be impacted. Other approaches that are common in the BPM world utilize an interpreted structure where XML-based definitions of the process are read at run time, potentially enabling those models to be adapted if needed. This “model-driven” approach is far more flexible allowing the organization to get around those show stopping scenarios where required exceptions effectively invalidate the process description developed beforehand. This is a critical problem for products that extend the underlying SharePoint process capability (WF). While these products may look a lot easier to use (to the uninitiated), they are still constrained by the underlying capabilities of WF.

- Without the ability to dynamically link processes together, developers end up building overly complex processes as they are forced to link everything together in a single structure. In SharePoint, there is no easy mechanism to pass context from one process to another; that requires coding – i.e. building static interfaces that are brittle and difficult to change. For example, let's say our compliance process needs to invoke another formal reporting process (if the employee's responses were deemed exceptional). Without coding around the limitations of WF, there is no way to automatically invoke a second process and pass it the context of the original process instance. The net result is that the original compliance assessment process is mixed up with the reporting process, when they would more naturally work together as two distinct procedures. Neither is it possible to dynamically chain processes together. Both of these are fundamental capabilities that are needed to reflect the true nature of the real world. For the process architect, these constraints significantly distort the overall process design.

**User Structure** – SharePoint's native functionality relies on Active Directory (AD) to provide the organizational roles and responsibilities. The problem is that many organizations have only a simplistic representation of their organization installed in Active Directory. It also implies that those developing processes need to plan for the fact that the AD structure might change. The net result is that both environments suffer since developers fear changing anything in AD, while AD is constrained to ensure it doesn't break something in SharePoint.

### **Case Study - Penson Financial Services**

*For Penson, the SharePoint story started in 2003. They deployed the platform extensively across their business and have seen huge benefits as a result. Penson has about 1200 SharePoint users worldwide, with locations in Asia, Australia, Canada, UK and the US. The organization does its work via the company SharePoint portal; effectively six separate portals (each with its own SharePoint Site Collection), all linked together and accessed via a common front end. Inside the largest operating company, there are four Site Collections, each catering to the needs of different groupings of users (for example HR and IT).*

*Clearly, both the business and IT organizations within Penson have bought into the value and vision for SharePoint. Yet, in common with many other SharePoint users, their journey to date has involved a few difficult lessons. Along the way, they had to re-architect and rebuild their entire environment, developing workarounds where needed. For example, ensuring an effective user experience was challenging. They had to build a global navigation structure to create the effect of one seamless portal. Applications that had to traverse Site Collections also required extra work.*

*A second challenge that Penson faced (and has resolved) was the breadth and depth of knowledge required to deploy SharePoint across the enterprise. Talking about their SharePoint experience, Penson's Manager of Collaboration Systems, Brett Kovatch said "To effectively deploy SharePoint, you need to know basic networking, internetworking connectivity, security, Active Directory, SQL Server, Index and Search, Portals, XML, HTML ... and that's before you get to the Process part of it. A solid, well-rounded SharePoint and process-knowledgeable person is very hard to find."*

*Penson has realized significant value through their use of SharePoint. However, this required an investment to develop the right skills and expertise. As Brett shared, "Organizations must have the vision to apply foresight, and planning before deployment – if not, it is going to cost them a lot more in the long run. Any shortcuts are typically just a patch."*

*Penson is representative of the mid-market SharePoint customer. They started small and it just grew. Over time, complexity drove the need to rebuild, which has pushed the overall cost of ownership. Their skills and capabilities have grown in line with their needs, yet they are still developing and adapting. They are now taking the next step into process automation via a BPM Suite, using it to streamline complex processes and integrate with several back-end systems.*

Inherently, when one writes code on a platform such as SharePoint, there are tradeoffs made. In the short term, it gets the organization around the roadblock presented, but longer term the implications of all these little changes mount up. First, one has to make sure that the rationale for the workaround is well documented and understood. Second, those who wrote the programs are probably going to have to maintain the code. Third, it impacts the overall flexibility of the environment as even the smallest deviations in meta-data structure or changes in process will need to be rigorously tested. As complexity grows and grows, it becomes harder and harder to forecast the impact of change, degrading the capability of the SharePoint environment and in the end, negating the original reason it was brought.

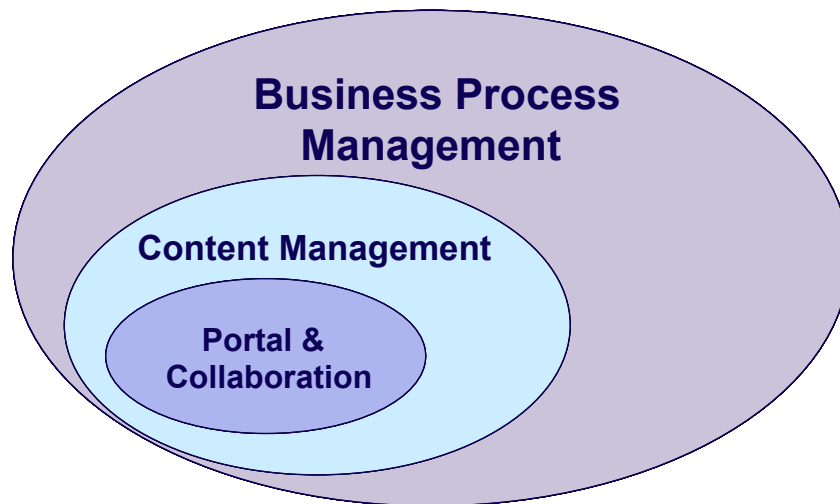
Furthermore, since there is always a fear that some important part of the business will be impacted if one changes a form or a process, developers have a tendency to make minor modifications and then save the form or process with a subtly different name. This leads to confusion amongst end-users and, in the end, errors and subsequent rework. Although these different versions may be on the same server (potentially across Site Collections), it becomes almost impossible to make global changes. Every change requires retesting on every Site Collection (as they may have subtly different meta-data structures).

While there are many more issues that one could identify, collectively these particular concerns have long term implications on Total Cost of Ownership (TCO). As the complexity grows, as it inevitably does, an exponential increase in TCO occurs. In many cases, it is more economic to throw away all work done to date and rebuild, starting from scratch with a more complete understanding of the need. So on the one hand, SharePoint enables immediate access; while on the other hand, without care and significant investment in IT resources, the overall cost to the organization can be massive.

These are the main reasons why organizations have looked to BPM Suites to extend their investment in SharePoint and alleviate many of these challenges. They need SharePoint to live up to the claim of Strategic Weapon and are looking at third party products to overcome some of its inherent limitations, extending it to meet critical business objectives.

### ***Growing Organizational Maturity***

SharePoint entered the market providing a combination of an integrated set of collaboration tools along with the content management capabilities needed to capture and archive material. Over time, as organizations start to develop simple processes to support their activities, they start to realize that these collaborations, and the content that derives from them, are just artifacts of a wider business process.



**Figure 1 – SharePoint provides strong capabilities to support the Portal and Collaboration as well as Content Management requirements, but runs out of steam in the wider Business Process domain.**

Indeed, the problem then becomes one of how to better support the business processes of the firm in achieving its strategic business objectives. Beginning with the Portal and Content Management of SharePoint, the organization has started on a journey – a journey that inevitably ends up grappling with the wider domain of business processes.

## ***Embrace and Extend Your SharePoint Investment***

Having embraced the SharePoint platform, organizations are discovering that, especially from a process point of view, SharePoint leaves a lot to be desired – particularly when compared with specialist BPM tool sets.<sup>10</sup> The key point is it that it is entirely possible to leverage the best parts of SharePoint – its Content Management and User Interface/ Collaboration features – and still benefit from best in class BPM capabilities.

Extending SharePoint with a modern BPM Suite makes a lot of sense across a diverse set of dimensions:

- **Information Sharing** – Allows organizations to bypass the information sharing and process constraints of SharePoint Site Collections. When the process is managed outside of SharePoint, it usually implies the capability to capture, and persist, process variables. This allows process context to then traverse existing Site Collections. For example, in the compliance example discussed earlier, the system could now deliver the results to the compliance department (in the central operations group), based on responses from far flung regions of the world. Effectively, applications can work more easily across the artificial boundaries imposed by the Site Collection container (without resorting to code).
- **Integration** – Most major organizations have a large number of existing Enterprise Applications that are central to their business operations. If they need to integrate across both SharePoint and say SAP or Oracle Financials, then the process needs to live outside of both environments, passing data where necessary.
- **Process Modeling** – Comprehensive BPM Suites bring with them more sophisticated mechanisms for representing processes. Making processes more explicit helps the organization both at the user level (more easily understood), but also later in maintaining any application developed. Without explicit process models, when a change is needed, an expert developer (proficient in .NET and SharePoint APIs) would have to check the documentation to work out what the previous developer was trying to do, and then determine what was required, before assessing how to make the change. The difference might be weeks compared with perhaps a couple of hours with explicit process models.
- **Escalation and Alerts** – BPM Suites tend to incorporate multi-level escalation and notification features, both capabilities that would require code workarounds in WF.
- **Model-Driven** – Using an interpreted model of the process (vs. a generated executable) enables better process adaptability and selective migration to newer definitions of processes which is especially important in long running processes.
- **Case Management** – The interpreted model structure means that some BPM Suites more easily enable the dynamic selection, invocation and chaining of processes; enabling far more flexible process architectures. For example, it then becomes possible to present users with a number of options and then based on their selections – as they exercise the judgment in responding to customer needs – the underlying process might link in other processes to better support the case in hand. Effectively, Case Management systems enable the organization to address ad hoc and unstructured processes, such as where there are multiple documents and/or multiple processes associated with a single case.
- **Rich Organizational Structure** – To better support task routing and security, BPM Suites tend to incorporate sophisticated mechanisms to represent the organization. These capabilities can normally build on and leverage existing Active Directory definitions. As a result it becomes possible to cater for scenarios such as routing a work item to another manager, other than the manager of the person who started the job; all without writing code.
- **Comprehensive Reporting** – With a BPM Suite monitoring work, it is normally straightforward to configure out-of-the-box process monitoring and reporting portlets, displaying this data back inside the SharePoint Portal (if needed).
- **Governance** – Having defined the policies, the BPM Suite itself can then help enforce them; handling everything from user-level site creation, to back-up and retention. Effectively, it is possible to manage the cradle-to-grave experience of the site and its content via a set of processes that apply across Site Collections and the entire organization.

Clearly, there are many benefits associated with extending the capabilities of SharePoint to cover the wider business process domain. With more effective support for the organizational business processes, it becomes much easier to

create that balance between control and empowerment. Effective processes also empower employees to respond more easily to customers' issues and demands. The central point is that without a comprehensive BPM Suite complimenting the functionality delivered by SharePoint, the organization is severely hindered in its ability to achieve its strategic objectives.

## **Vendor Approaches**

Our research has identified a range of independent software vendors that have developed process-related SharePoint add-ons, or integrated their existing offering with SharePoint. Each vendor has taken a different approach, and depending on the tactic taken, different levels of functionality are enabled.

Fundamentally, there are two levels – those that have stayed with the underlying WF as the engine and those that have replaced it with their own engine. This second group further subdivides into those that have elected to keep their own proprietary user interface, treating SharePoint as merely a document content repository, and those that have fully integrated with the platform, and are also leveraging the rich user interface that SharePoint provides.

### **Native WF Enhancement**

The first level of capability comes from vendors that have developed add-on products that leverage the underlying WF SharePoint process capabilities. Keeping the SharePoint user interface, they have concentrated on making WF more accessible, providing WebParts for process modeling, task lists and dashboards. Given that WF-based processes are limited to the boundaries of the SharePoint Site Collection, add-on products that still focus on WF as the vehicle for implementation will struggle with the same set of limitations (even though they may make developing these processes appear simpler). Key vendors in this category are Nimtex and K2.

### **J2EE BPM Vendors**

These vendors capabilities typically sprang out of existing customer enquiries about SharePoint integration. They generally support one or more of the following styles of integration:

- **Access from SharePoint** – They have developed WebParts for SharePoint that enable users to view and interact with their task lists, or view dashboards. The processes and artifacts are generally stored in the external BPM environment (rather than SharePoint).
- **Instant SharePoint Sites** – Treating SharePoint as a mechanism for handling exceptions or ad hoc interaction points from within their own BPM Suites. Here they have kept their own user interface for the bulk of the work, but then drop into an instantly created SharePoint site to capture related artifacts or handle discussions between team members around individual work items.
- **Access SharePoint Artifacts** – The external BPM application accesses SharePoint artifacts (documents), bubbling them up into another, more structured application (i.e. not leveraging the SharePoint user interface).

For organizations going down this path, they have to deal with a mixed infrastructure environment – J2EE for the underlying engine and .NET for their SharePoint infrastructure. Moreover, they are not truly utilizing SharePoint to its full potential. Vendors in this category include Lombardi and Appian.

### **.NET BPM Engines**

These vendors have developed specifically for the Microsoft platform, but have opted to replace WF with their own process engine. As a result, they have both the native SharePoint user interface (WebParts), as well as the ability for their processes to span Site Collections. By definition, they integrate at a deep level with the SharePoint environment, leveraging and enhancing the existing content management and meta-data functionality. Overall their process capabilities are much stronger than those who have elected to keep the reliance on WF. For example, they can handle the in-flight process adaptability challenge in a SharePoint environment which is otherwise constrained to purely executable processes. Vendors in this category include Global 360 and Ascentn.

Global 360 have taken the BPM capabilities even further by incorporating key usability features:

- **Case Management** – Allowing individual cases of work to support many processes at once, all accessing a common context. This is a lot more flexible than traditional process-based approaches, which result in rigid process models that do not readily support the dynamic unfolding needs of case workers. Moreover, this style of working is a lot

more acceptable to the employee who is now empowered to make goal-oriented decisions (generally a better outcome for the customer).

- **Role-Specific User Interfaces** – Developed for common roles within the organization such as the Builder, Participant and Manager, these environments (Personas) come pre-built as SharePoint webparts with many of the features a manager or process developer might want. These are then amenable to personalization by the individuals themselves. Given existing familiarity with SharePoint, this Persona approach makes it easier to deploy into the business as it natively leverages the SharePoint user interface.

## ***Conclusion***

Microsoft uses the language of BPM, but they don't really have a BPM product set – they use the term but do not have the inherent capability. This has led pundits to proclaim that SharePoint allows “the unbridled proliferation of ungoverned, ad hoc processes using unmanageable technology.”<sup>11</sup> The important point here is that while anything is possible if you write suitable programs, manually coding workarounds at every brick wall will eventually bring the environment to its knees. All of these external workarounds add complexity and, in the end, dramatically grow the Total Cost of Ownership (TCO). Moreover, applications become more and more prone to fracture/failure over time. However, our contention is that the combination of SharePoint with a modern BPM Suite really does enable the promise of SharePoint as a “Strategic Weapon”.

## Notes

- 1 We define a BPM Suite as a set of software tools that work together to enable the organization to better manage its business processes and relationships with customers. This implies the ability to drive work using a set of explicit process models, monitoring progress and enabling their ongoing improvement. On the other hand, Business Process Management is a business improvement management discipline – it is about people, the way they work together (their business processes) and the performance objectives that these processes underpin. At the same time, it usually involves a suite of enabling technology that makes this vision a reality. BPM is also itself an incremental process in that BPM systems implementation is done in stages, and change happens in bite-sized chunks, layering on new capabilities and functionality bit-by-bit, rather than using big-bang deployments. BPM as a management discipline is a distinctive way of running the business (a different mind set) that continually drives performance improvement. BPM is a journey, not a destination.
- 2 It should be noted that while Microsoft often uses the language of BPM, the inherent BPM capabilities delivered by the SharePoint platform are rudimentary at best.
- 3 <http://www.information-management.com/news/-10016150-1.html>
- 4 According to Mary Jo Foley – long term Microsoft watcher <http://blogs.zdnet.com/microsoft/?p=3609>
- 5 According to the Radicati market research firm.
- 6 It is worth noting that SharePoint collaborates with, and in some cases relies on, many other programs in the Windows constellation. Some of the issues and features discussed here can be overcome through the clever application of other programs from Microsoft, while other third party tools can resolve the issue. However, the central points being made in this paper are generally valid as they relate to the functionality of SharePoint out-of-the-box.
- 7 Figures extracted from research conversation with Sue Hanley October 1<sup>st</sup> 2009. Sue is a co-author of Essential SharePoint 2007 and before going independent she led the SharePoint Practice within Dell's professional service organisation. She can be contacted via <http://www.susanhanley.com/>.
- 8 See Dave Wollerman's SharePoint Blog <http://vspug.com/llowevad/2007/06/25/site-collection-logical-architecture/>
- 9 It is worth noting that some of these issues may be addressed in either the 4.0 release of .NET which is likely sometime next year, or the imminent release of SharePoint 2010.
- 10 It should be noted that while Microsoft often uses the language of BPM, the inherent BPM capabilities delivered by the SharePoint platform are rudimentary at best.
- 11 Scott Francis of BP3 talking about SharePoint <http://www.bp-3.com/blogs/2008/10/six-barriers-to-bpm-adoption-in-the-enterprise/>

# An Introduction to BPM Focus

## Doing Different Things

*Strategy - Innovating for Competitive Advantage*

Knowing how to define a competitive business strategy and translate that into reality is our business! We can help you move from a Functional orientation to one focused on Services and Processes. We will assist you no matter where you are on this journey, helping to facilitate and train your organization in:

- Setting a **Transformation Strategy** around the delivery of “**Great Customer Experiences**” (see [video](#)).
- Designing the **Service-Oriented Business Architecture** to support the designed Customer Experience.
- **Architecting Processes** To Support Those Services.
- **Engaging the People** to deliver Great Customer Experiences.

## Doing Things Differently

*Continuous Improvement - Delivering Value!*

Wherever you are on road, we will help you select the appropriate tools and techniques that suit your needs. We focus on helping the enterprise develop its own capabilities. This may take the form of structured learning and training in BPM techniques, or facilitation and program support:

- **Developing A Structured Project Method Set** and building the **BPM Center of Excellence (CoE)**.
- Developing effective **Process Architectures** and **Metrics**.
- **Training** in Process Modeling Fundamentals (for one of our technique expertise areas see [www.bpmreferenceguide.com](http://www.bpmreferenceguide.com)).
- Program and **Project Management of BPM Initiatives**.

Given the awesome power and potential of BPM Technology, it is obvious that firms should first look at **Doing Different Things** – deciding what business you are really in (the strategy), developing a new customer/ process-centric vision and planning for the transformational challenges your organization will face on the journey. That BPM journey starts with an exploration of innovative strategies, leading to service definitions backed up by effective customer experience descriptions. It moves down into deciding on the processes (to support those experiences), then on into the models that help people communicate these things (and drive the work itself). Alongside that journey is another pathway – developing a culture that inspires and empowers people to perform, while all the time delivering on the expectations of their customers. Collectively, these two strands of development drive the creation of long-term competitive advantage for the enterprise.



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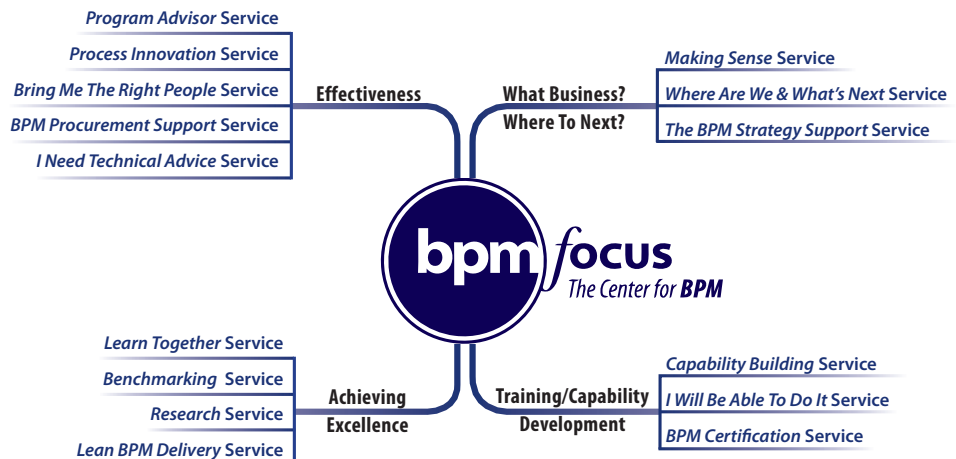
John Jeston



Martyn Ould



Lance Gibbs



The Center comprises a Core Team of real experts – they are literally “giants” in the BPM industry, recognized for their insight and expertise and their light touch interventions that have an impact far greater than their inputs. Their hands-on engagements range from the delivery of strategic advice and guidance, through to custom research, coaching/mentoring and direct program support. Furthermore, we are able to provide additional (temporary) resources to support your program. The Core Team validates, trains and provides second level support through these independent associates. Our Services are your Outcomes. For a quick assessment (half day engagement), send an email or contact Derek Miers on the number below.