

Global 360

Delivering Persona-based BPM for Process Success

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Global **360** 

At Global 360, we take process success seriously. We define our success by our customers' success, one customer at a time, and one process at a time. That is also why we have been investing heavily in furthering our understanding of process specifically targeted at helping our customers realize hard ROI on a consistent and predictable basis.

Our approach to process comes from a legacy of document-centric process success with customers on a global basis. Now, culminating from an extensive program of research, analysis and 'on the ground' experience in developing a deeper understanding of just what it takes to quickly and consistently achieve compelling results from process initiatives, we are delivering Persona-based BPM.

Persona-based BPM directly addresses the people in the process, all of them. Our research and experience clearly shows that by creating a process environment attuned to the needs and wants of the people who build, participate in and manage process, the results are consistent, and they are compelling. But you probably already knew that, because you live with that reality every day of your life. And the sad truth is that for most BPM initiatives, the wants and needs of the people in the process are just not addressed in any meaningful way.

Not any more...

Our Persona-based BPM approach combines technology, services, domain expertise, behavioral analysis, and 'across-the-board' alignment to drive

consistent and predictable success of BPM initiatives, both out of the gate and for the duration of the process life-cycle. We understand, and have packaged our solutions, to ensure that you 'hit the mark' with process improvement that will dramatically enhance the ability of people in the process to 'get work done.' We help you achieve operational excellence in every aspect of your processes; and to protect, retain and further improve that excellence over time through your process's life.

In our Persona-based BPM approach, we recognize and address the unique characteristics of people in process, by the role that they play, by embracing their perspective on process and by empowering their individuality. Persona-based BPM is process designed for people, specifically geared to make their work easier, to help them increase the quality and success of what they do, and to grant them the freedom to personalize their interactions with process. At Global 360 we categorize these people into the user-types of builders, participants and managers. Through a combination of services and integrated UI support based on behavioral analysis, role-specific customization, personalization and collaboration we deliver an intuitive, personalized and highly productive process experience across all process user-types.

The Builder Persona – from the top

Call them process owners, architects, business analysts, process specialists, line-of-business owners, IT professionals... whatever their title may be, someone is deciding what processes are going to be targeted, why and what results the process should achieve. These

are process builders, and their link in the success chain involves setting the landscape for process success.

These builders may have to start by setting the stage for a process improvement project: by identifying improvement opportunities, building business cases, crafting process KPIs, and preparing the overall process plan.

Builders have the responsibility for setting the process landscape. For builders, Global 360 offers a viewPoint Assessment that can address all—or any subset of—these challenges. We know what it takes to navigate this challenging aspect of process to a successful conclusion, and we've refined this builder activity into a highly focused program that takes as little as 5 business-days (average 10 business-days—up to 20 business days for larger scope assessments) to build the insights you need to successfully justify, implement and realize process improvement that delivers hard ROI to the business.

Further, we directly address the needs of process participants in the assessment, making sure that the resulting 'plan' is the right approach to enabling process participant buy-in, minimize change management issues, enable participant success, and protect planned improvement benefits. We know that your success ensures our success, and we have developed the viewPoint Assessment specifically to help you—our valued customer—be successful in your process initiative. The assessment is outcome-driven, able to address success factors including:

- » Discovering improvement opportunities for your most critical business processes

- » Identifying and empowering the individuals and roles that support your processes
- » Prioritizing those processes with the greatest ROI potential for BPM improvement
- » Establishing key process indicators (KPIs) to measure and ensure desired improvements
- » Creating an ROI-based business case to secure executive sponsorship and funding
- » Validating desired improvements leveraging key process indicators (KPIs) and a modeled ROI approach
- » Securing executive support and funding from business and IT decision makers

The Builder Persona – streamlined and collaborative process development

You might also be a builder that is responsible for developing processes at one of several levels. For example, you may be a business analyst or IT professional that conducts interviews, analyzes existing process documentation, and creates a basic working process model with or without a viewPoint Assessment. You may be tasked with creating the process model, goals, and design that will be translated into an executable process.

For you, Global 360 provides an integrated environment with a viewPoint interface designed specifically for your needs—one that let's you conduct or participate in collaborative process design activities. Further, in your design activities we provide you with a comprehensive

library of pre-built tasks and activities to simplify your process design work. To validate your processes, we provide simulation capabilities you can use to work through 'what if' scenarios and test your hypotheses. We know that at times processes require rigorous 'up front work' to validate assumptions and uncover constraints and dependences. For you, Global 360 has the environment you need to work collaboratively with others, and conduct 'deep dive' analysis with as much rigor as the situation demands.

The Participant Persona – getting work done

Based on what the builders build, participants in the process do the work of tasks, activities, analysis and incremental optimization. Participants can include employees in a number of roles such as operational staff, support personal and business analysts but there can also be participants outside the organization; including business partners and customers.

For process participants, Global 360 can help identify who you are and what you need in the viewPoint Assessment, capturing the information needed to craft the process experience that will empower your success.

Our collaborative capabilities in our process design environment can be used to have you directly participate in process development, while creating a single source of documentation for all of the activities conducted during process design.

When its time to 'do your work,' we provide you with your own viewPoint interface specifically designed for

your 'perspective on process.' This interface, crafted to give you what you need—how you need it, is specifically designed to make your interactions with the process as simple and successful as possible.

Besides getting 'just what you need' in an intuitive interface designed just for you, your viewPoint interface can be further personalized—by you—to reflect your individual tastes and behaviors including the ability to express your personal perspectives such as your current workload level, and priorities as you see it.

The Participant Persona – adapting to your needs

Further, while you may not 'see it,' we capture all of the extra efforts you must go through as part of the working history of the process. We do this to create accurate, detailed process feedback—without any additional effort on your part—so that other participants in other roles (such as business analysts) can see the real process 'through your eyes' and make further improvements that can simplify your work even more in the future.

This also enables other participants to adapt your work and your process to changes that naturally occur based on the changing work requirements you are faced with: and you know that changes occur because you have lived through them many times already. So while most approaches to BPM over time leave you, the person doing the work, with a process that moves further and further out of alignment with how things really are, Global 360 captures these changes so that your work, and your process, can be aligned to your needs as changes occur.

The Manager Persona – relevant to decision-making

Where builders set the landscape for process, and participants perform the work in process, managers must have visibility and transparency into one or more aggregate perspectives on process in order to provide oversight, direction and leadership.

For managers, whether you are a line supervisor, department head, line-of-business owner, or senior executive, Global 360 offers a viewPoint interface specifically designed against your needs. We show you the relationships you need to see across your aggregate domain of process, and help you quickly and easily zero in on what you need to know to make meaningful decisions and provide incisive leadership.

We know that only by providing you with the information that is relevant to your needs and perspective, in an intuitive and uncluttered manner, can you make the best decisions; enabling you to act with the confidence that comes from knowing what is 'really happening' in the operation of your processes.

Whether your mandate involves a specific process, a group of processes, a business unit or an enterprise, we present you with the relevant information you need at the correct level of aggregation, so that you can make the decisions that will further the success of your business.

The Manager Persona – Goal Management as a way of life

We also help you achieve goals through goal management where we can help you identify strategic process goals,

define KPIs, back KPIs with metrics and measure what is really happening to assess your degree of goal attainment.

While many organizations use process statistics to measure and manage their processes, at Global 360 we understand that it takes more than just statistics to successfully achieve the goals that really matter. We support the manager persona with Global 360 Goal Management, a tiered approach to measuring performance against goals that starts with strategic intent and extends all the way down to daily operational SLA management.

We know that successful goal management starts with strategic process goals used to build high level process KPIs. Our goal management approach takes strategy (desired process outcomes) and translates them to stated goals (outcomes as measurable attributes) then on to metrics (the calculation behind the goal). We can help you craft those strategic goals and KPIs through our viewPoint Assessment service and we enable management of goals through our managerView process intelligence capabilities.

With strategic goals in place, we help you manage your achievement of those goals by tracking the measures behind strategic metrics so managers can see exactly where their performance is against targets. Our Goal Management approach provides you with the information you need to proactively manage your processes at any level to ensure goals are achieved.

This moves process management from lagging, performance-based statistical analysis to leading metric analysis explicitly linked to your strategic goals. With Global 360, you manage the high level goals of your business case directly. You no longer have to 'wait and see' for end

of week, month or quarter performance reports to know if your actions influenced your desired outcome because you are directly managing that outcome—just as other managers are directly managing your outcome as it relates to their perspective on process.

We know that process success starts with strategy and is delivered by process. Our Goal Management approach gives you direct insight into the achievement of your goals at every management perspective related to that goal.

The Manager Persona – Goal Management as a way of life

With persona-based BPM, we are embracing every aspect of getting work done. We understand that for our customers, for you, to fully realize the potential of business process management in your organization, we must enable your people to do their work better than ever before.

To this end we have embarked upon the persona-based BPM path, where we are addressing the ‘hard’ people issues in process that have no easy answers. If we want work to get done, then there are a lot of things we must do right. We must have clear strategy with measurable goals. We must have a process that is designed specifically to enable the people who do the work to get that work done. We must enable people to intelligently perform their work, including the flexibility and freedom to adapt to demands ‘on the scene.’ We must evolve our process as the world changes around us and we must manage our processes with transparency, visibility and relevant information that support good decision-making.

Persona-based BPM is about people. It is about performance improvement. It is about business success, higher productivity, improved quality and operational excellence. At Global 360 we are committed to leading our customers to new levels of success by addressing the limitations and challenges of common approaches to BPM. Our goals are clear, and they are your goals. With persona-based BPM we are addressing the ‘tough challenges,’ the subjective aspects of process and the real issues that live in the heart of process where the real work gets done.

Persona-based BPM from Global 360 – empowering the people in process.

About Global 360

Global 360 helps organizations to better manage processes today and make improvements for tomorrow. Our process and document management solutions improve business performance by maximizing the productivity of all participants in a process. Building on our strength in financial services, government, insurance, manufacturing, telecommunication and the retail sector, Global 360 has helped more than 2,000 customers in 134 countries reduce paper, automate processes, and empower individuals to truly change how work gets done.

Global 360, Inc. is headquartered in Texas with operations in North America, Europe, and the Pacific Rim. For more information about Global 360’s process and document management solutions, please call 1-214-520-1660 or visit the company web site at www.global360.com.

About the Author

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Terry Schurter is a Global Thought Leader on the subjects of Business Process Management, Process Excellence and Customer Expectation Management. He serves on the Board of Directors of the non-profit International Process and Performance Institute and has held past positions as Bennu Group CEO, Research Director for Process - Bloor Research, and BPM Group CIO. An accomplished author and highly sought-after speaker, Terry received the Global Thought Leadership Award from the BPM Group in 2007 and authored the book Customer Expectation Management - Success without Exception in 2006. Terry is considered by many to be the leading Subject Matter Expert in the field of Business Process Management.

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