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# BPM Organization and Personnel

## Part 2: Essential Roles in a BPM Support Group

## Abstract

Mature Business Process Management (BPM) capability requires more support resources than most organizations realize. Without these resources, business units and departments that are trying to implement BPM often run into issues which reduce the effect of their efforts. Part of a BPM white paper series, this paper addresses the eight essential roles that are needed to support efficient and effective BPM implementations.

The BPM white paper series uses the Innovation Value Institute (IVI) BPM Capability Framework, shown in Table 1, as its organizing structure. Examples from various industries will be cited, but throughout the white paper series the development of BPM Capability at Chevron will be featured. A maturity model, with five descriptive levels of maturity covering each of the nine Capability Building Blocks shown in Figure 1, can be accessed through IVI.

**KEYWORDS:** Business Process Management, support resources, Chevron, BPM Capability, maturity model, maturity levels

**Table 1: BPM Capability Framework**  
(adapted with permission from the Innovation Value Institute)

Capability Building Blocks for Business Process Management		
Category	Capability Building Block	Description
Foundation	BPM Organization and Personnel	The structure, competencies, resource levels, and roles and responsibilities of personnel involved with the development, dissemination, and implementation of process-related standards, methods and technologies.
	BPM Standards and Methods	The set of standards and methods that foster effective process management, including a glossary, modeling and notation standards, modeling and improvement methods, governance structures and practices, assessment of implementation effectiveness, and measurement of value.
	BPM Technologies	Technologies for documenting, organizing, evaluating and supporting the execution of the organization's activities.
	Stakeholder Management and Communication	The management of communications with stakeholders about process management approaches, success stories, lessons learned, potential value opportunities, and value realized.
Application in each Organization	Scope of Implementation	The organizational context in which BPM is being used, including the range of processes being addressed.
	Process Architecture	Structure and documentation of processes, including names, definitions, objectives, roles, flows and relationships.
	Process Governance	Development and implementation of principles, policies, roles, responsibilities, and measures for process governance and ownership. This also includes alignment of process management with planning and implementation activities of the organization.
	Process Improvement	The use of evaluation, redesign, and improvement methods to drive change in processes.
	Process Automation	The use of technologies to simulate, eliminate, automate, monitor, and optimize steps in a process.

## Introduction

This white paper is the second in the Innovation Value Institute (IVI) BPM white paper series. The first paper addresses issues associated with the mission and formation of the BPM Support Group. This paper addresses the roles needed in such a group.

## Skill Sets needed in a BPM Support Group

To ensure a truly comprehensive BPM implementation, there are eight essential roles for developing and providing BPM capability that will position the enterprise for BPM success. For various reasons, these roles may not necessarily be fulfilled by eight people. In the early stages of a BPM initiative, some roles may be combined and performed by a single person, and some roles may not be performed at all. In the more mature stages, some roles may be subdivided and performed by more than one person. The eight roles are:

- BPM Competency Manager.
- Lead Developer of BPM Standards, Methods, and Implementation and Governance Models.
- BPM Technology Specialist.
- BPM Technical Support Group.
- Lead Automation Solutions Developer.
- BPM Consultant.
- BPM Promotion Specialist.
- BPM Champion.

Table 2 provides summary information about these roles, their missions, and some of the prototypical attributes needed for success in each area.

The reality is that in many cases, when a BPM effort is in its early stages, a very small group of people may be responsible for all of these roles. In fact, if an enterprise has not yet completed any significant BPM effort, it is possible that only those familiar with the content of this paper would know of the need for these roles to be performed at all. Those below CEO-level may choose to become a BPM Champion and drive the development of BPM capability themselves. Alternatively, if the CEO decides to commit to BPM, then they can empower any qualified person of their choice to be BPM Champion, and that person will be backed by the CEO's power and influence to develop and deploy BPM capabilities as needed. In the latter scenario (CEO commits to BPM), the champion's job, while still difficult, is much easier than in the former scenario (no CEO support).

In any case, rarely can a single person sustain a serious BPM effort for long in a large enterprise.

This white paper discusses each of the eight roles in more depth and presents the competencies that must be in place to support an enterprise BPM effort. However, this presentation of competencies is somewhat idealized and actual needs will depend on where an enterprise is positioned on its BPM maturity curve. As maturity increases, competency requirements will become greater and additional personnel will be needed to fulfill more specialized roles. Over the course of a few years, a centralized BPM Support Group may grow from two or three personnel up to as many as 15–20 personnel (excluding BPM Consultants who are embedded in business units and departments).

**Table 2: Roles needed in an Enterprise BPM Support Group**

BPM Support Role	Mission	Desired Attributes of Individuals
BPM Competency Manager (may be a role performed by the Manager of the BPM Support Group)	To define the roles and competencies needed to support BPM, and to facilitate placement of personnel accordingly.	Knowledgeable of HR policies and practices, knowledgeable of the roles needed for BPM, experienced with management system, well-connected, respected.
Lead Developer of BPM Standards, Methods, and Implementation and Governance Models	To manage collaborative efforts to define, document, and govern the BPM standards, methods, and models that will be used across the enterprise.	Logical, rigorous, detailed; can start from an ideal model and then work towards a practical solution; good at organizing materials for absorption by others.
BPM Technology Specialist	To manage clarification of requirements; to evaluate and select technology options; to oversee configuration, installation, and implementation; to develop a Technical Support capability; and to continuously assess and improve technologies.	Deeply concerned about the use cases for BPM technologies; knowledgeable about available BPM technologies; technically knowledgeable about IT standards; able to design an effective support structure.
BPM Technical Support Group	To maintain reliable performance of BPM technologies.	Highly responsive to user needs; technically competent with the technologies.
Lead Automation Solutions Developer	To establish and manage a discipline associated with automation solutions.	Excellent developer/programmer skills; able to collaborate across organizational boundaries to educate others on standards and methods and to facilitate re-use of common patterns.

BPM Support Role	Mission	Desired Attributes of Individuals
BPM Consultant	To provide BPM consulting and process modeling services, preferably teaching and mentoring others how to use the technologies so business units and functions can become self-sufficient; may take on project management responsibilities.	Empathetic, good listener, logical; able to move easily between big picture and detail perspectives; able to effectively use relevant BPM technologies and methodologies; able to develop skills in others. (Note: one type of BPM Consultant is a Six Sigma Black Belt. BPM Consultants specializing in Process Improvement facilitation will be expected to have relevant training and skills.)
BPM Promotion Specialist	To develop materials and approaches to persuade stakeholders of BPM's importance; to work with sponsors to deliver messages.	Marketing-oriented, good communicator, assertive engager of those who might benefit most from BPM, well-trusted.
BPM Champion (may report to the BPM Support Manager or may fulfill that role)	To work with all other stakeholders to achieve an effective BPM implementation.	Adaptable, visionary, opportunistic, persistent, systems thinker, good communicator; performs other roles as needed; devoted to the cause; aligns details to vision.

### BPM Competency Manager

The *BPM Competency Manager* role is one that is best placed in the enterprise BPM Support Group. Ultimately, it is the responsibility of the person in this role to maximize value from BPM by ensuring that the right competency expectations are understood across the enterprise—in both the BPM Support Group and in implementing organizations.

Figure 1 shows the relationship between the enterprise BPM Support Group (which is the subject of this paper) and local BPM and Process Support (which is the responsibility of local line managers and will be addressed in a future white paper on the subject of Process Governance).

It is important to note that Figure 1 represents the support structure in a mature state. Things will begin more modestly, but this is the ultimate vision which the *BPM Competency Manager* must keep in mind. Not only must they cultivate the BPM competencies of the enterprise BPM Support Group, they must also ensure that there is development of competencies at local level. Without local competencies, irrespective of the ability of the enterprise BPM Support Group, there will be no sustainable implementations and, therefore, no vibrancy to the BPM initiative.

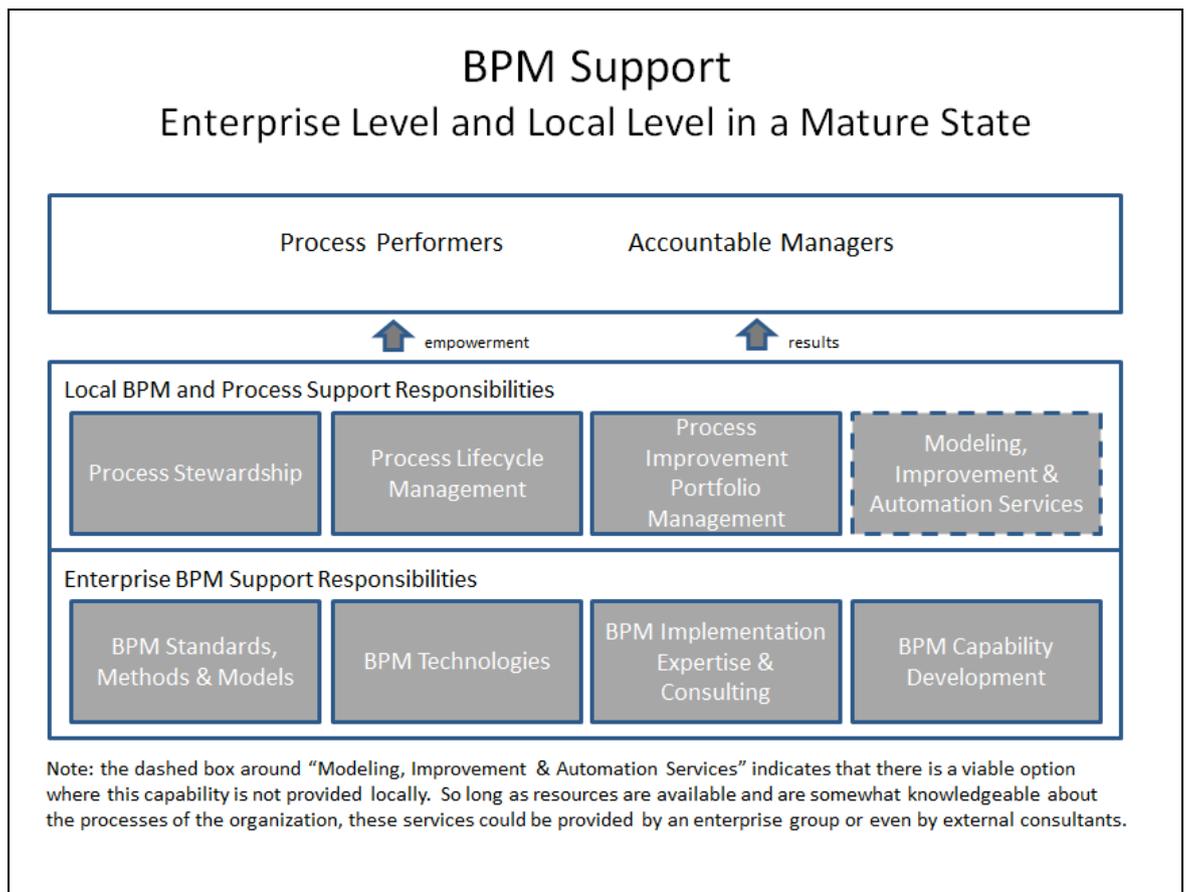
It might be a natural fit for a person assigned as the Manager of the BPM Support Group to also take on the role of *BPM Competency Manager*. The *BPM Competency Manager* will oversee the fulfillment of the remaining roles discussed in this paper. The *BPM Competency Manager* will be involved also in development of competency models and in planning for

fulfillment of business unit stewardship and coordination roles that will be discussed in a future paper in the series.

Suggested activities for the *BPM Competency Manager* (more or less in chronological order) are:

- Understand roles and responsibilities as described in this paper and in a future white paper on Process Governance.
- Assess where the enterprise is on its BPM journey and what the emphasis will be with regard to BPM capabilities, and then document BPM competency needs for 1-, 3-, and 5-year horizons.
- Work with the manager of the BPM Support Group (if it is a separate position from that of *BPM Competency Manager*) to develop an Enterprise BPM Competency Fulfillment Plan for the BPM Support Group.
- Work with business unit leaders and department leaders who have demonstrated a desire to implement BPM—in order to develop a Local BPM Competency Fulfillment Plan for each of their organizations.
- Participate in selection of personnel to fulfill the roles, and continue to update role requirements as needed.
- Develop mechanisms to sustain and improve competency levels of BPM personnel. These may include, for example, training, communities of practice, and expert mentoring.
- Monitor performance of personnel against role expectations, and facilitate corrective action as needed.

**Figure 1: BPM Support—Enterprise Level and Local Level in a Mature State**



**Lead Developer of BPM Standards, Methods, and Implementation and Governance Models**

The importance of the role of *Lead Developer of BPM Standards, Methods, and Implementation and Governance Models* may not be immediately obvious, but standards, methods, and models (SMMs) are cornerstones of a BPM effort. SMMs are the common “language” of the BPM effort. Without them, communication among practitioners will be hampered, and the BPM effort will be fragmented into differing schools of thought and practice.

SMMs include entities such as a glossary of terms, competency standards, training curricula and materials, process modeling notation standards, process improvement methods, process modeling methods, process governance models, etc. The challenge faced by a person performing this role is not one of scarcity of choices; rather, it is a matter of having too many choices based on sometimes contradictory “expert” advice. Also, while some SMMs will be independent of technology selection, the chosen BPM technologies will impact some SMMs. In a future paper in this BPM white paper series, the topic of standards, methods, and models (SMMs) will be covered in depth.

The success of this role will be judged by the extent of adoption by users, and by feedback from those users regarding the effectiveness

of the SMMs and the training, guidance, and reference materials. Needless to say, providing all the necessary artifacts is no easy task and it should be approached with a multi-year perspective.

Suggested activities for a person with this role (more or less in chronological order) are:

- Develop an inventory of the SMMs that are already in use, and complete a preliminary assessment of their effectiveness.
- Develop an understanding of the SMMs that will be needed by the organization (this should evolve over time, but a preliminary list should be developed early on). A future paper in this BPM white paper series, on the topic of BPM SMMs should help the person in this role get started.
- Understand the BPM technologies being used and how they may impact the SMMs. For example, some technologies will have aspects that integrate with particular methods. If a technology has not yet been selected, avoid premature overdevelopment of SMMs that will be impacted by technology choices.
- Develop the first-year plan for SMM development and deployment, including a list of SMMs that are targeted to be completed and available for widespread use.

- Establish policies and standards that are related to the development of SMMs. For example, identify the person or body that will approve or endorse BPM SMMs for use. Identify the forms, formats, and templates in which SMMs will be captured.
- Collaborate on the development of SMMs with other BPM Support Group members and with representatives from business units that are committed to BPM implementation. The person in this position must be prepared to do most of the work while maximizing the value of input and feedback from the “customers” of the SMMs.
- Deploy SMMs, assess their effectiveness, refine them as needed, and maintain an SMM repository where everyone can effectively locate and access the SMMs they need.
- Establish policies regarding the use of the SMMs (e.g., what is mandatory versus what is guidance, how to request exceptions).
- Establish a process to manage additions and changes to the SMM inventory as well as to handle exception requests regarding SMM usage.

After the initial sets of SMMs are published and refined over the course of a couple years, the resource requirement for this activity should subside. But when new additions or major changes to the set of SMMs are needed—for example, as a result of introducing a new type of BPM capability—a larger resource commitment will be required once again for development, deployment, and refinement.

### **BPM Technology Specialist**

Ideally, the person in the role of *BPM Technology Specialist* will collaborate closely with the person developing standards, methods, and models (SMMs) to ensure compatibility of the technologies and the SMMs. Initially, the person in this role may be confused by the array of technology options and functionalities that are available.

Perhaps the greatest challenge for this role will be the need to combine, in one person, the knowledge of an IT professional together with a sensitivity to those who will use the technologies. A significant mistake made in many organizations is to evaluate BPM technologies with too much emphasis placed on traditional technology selection criteria such as extent of feature set, compatibility with architectural standards, and vendor support resources. While these criteria are relevant, criteria related to “fit for purpose” and “end-user friendliness” are at least as important.

However, even with properly weighted criteria, it is not easy to pinpoint the purpose of any particular application since they all seem to do so many things, nor even to determine which communities of end users to target for use of any given technology. (Note that the vendors may not be particularly

helpful in this regard as they are likely to claim that their software will address *all* of the important BPM needs whether or not that is the case.) Consequently, the effort to select the right mix of BPM technologies is almost certainly an iterative process, and organizations might wish to consider a pilot strategy where a few different technologies or technology combinations are tested before a long-term commitment is made. At a minimum, a pilot effort to test the effectiveness of the apparent best-fit technology in a real environment should be completed before a large commitment is made to one software vendor. BPM technologies will be addressed in more depth in a future paper in the BPM white paper series.

The *BPM Technology Specialist* must stay in touch with the evolving BPM needs of the enterprise and must more or less continuously assess how existing technologies are serving those needs.

Suggested activities for a person with this role are:

- Identify any existing BPM technologies being used in the organization, and, if there are any, assess how they have been used and supported. If one or more look promising as enterprise applications, consider how to build on the successes.
- Identify opportunities within the enterprise where it appears a BPM technology could help based on the organization’s current state of maturity, and establish with personnel in the target organization a dialog about requirements. However, do not expect that business people will actually understand what is possible with BPM technologies; they may not be very adept at providing requirements for things they have not yet thought of. Practice creating detailed descriptions for them of what is possible. Success is achieved when descriptions combined with a demonstration of the technology spark their imaginations.
- Learn as much as possible about the BPM technology landscape. Some good, basic knowledge can be gained by reading BPM technology reports or attending conferences or webinars by companies such as Gartner, Forrester, Business Process Management Initiative (BPMI.org), and Business Process Trends (bptrends.com). Especially study successes achieved within one’s own industry, but do not be overly influenced by an occasional successful case study. If given the chance when presented with a successful case study, ask lots of questions about the profile of the user community for the technology and reactions by users to it, about how easy it is for a company to become self-sufficient in the use of the technology (rather than relying on the vendor), and about the degree of change management required by (or enabled by) the technology.

- If BPM technology choices are not already decided, arrange meetings with several vendors that have become familiar to you during the learning phase. Choose vendors that seem to have different approaches and serve different purposes. Choose both low-end (i.e., less expensive) and high-end (i.e., more expensive) technologies in order to better understand what money will buy. Prepare an evaluation template (and keep evolving it) to capture the aspects of the technologies that will be most relevant for the enterprise. Most vendors should be willing to give a demonstration of their technologies (insist on seeing the actual application, not just slideware about it). Do not feel bad about contacting vendors multiple times for information; it is a complicated subject and nobody knows all the questions to ask the first time around. Most vendors tend to be very responsive, especially to employees of a large enterprise. They want a sale and the credibility that goes with having a large company as a customer!
- When considering committing to a technology, identify a proof of concept opportunity where the technology can be evaluated on a small scale. Many vendors now have hosted solutions, so installation and configuration issues can be largely deferred until after the technology has proven itself in the business realm of your organization. Sometimes, vendors will provide free or discounted resources to help with an initial proof of concept.
- As learning about BPM technologies occurs via research and proofs of concept, document how one or more applications will efficiently cover the BPM needs of the organization. Some vendors claim their applications can cover everything. Be skeptical of such claims!

The biggest trap in choosing a BPM technology is to become overly focused on automation. Automation technologies are powerful and can add lots of value. Nevertheless there are equally important, though less talked about, BPM technologies that address representation of overall process architectures, process governance, and manual process execution support. In this BPM white paper series, this type of software will be referred to as Process Engagement software. This type of software is less talked about, in part, because it is harder to implement from a human perspective and therefore requires more management involvement. However, if an organization stays in the automation-only realm, there is a strong chance that the BPM effort will be viewed always as an "IT thing," and a broad-based, process-oriented culture may never be cultivated. This issue also will be addressed further in a future white paper on the subject of BPM Technologies.

At Chevron, in its early stages of BPM maturity circa 2005, a non-IT person

performed the role of ensuring that the selected BPM technology met business user needs. In fact, for the selected BPM technology, IT considerations were inadequately addressed and Chevron was fortunate to select a BPM technology that performed adequately in the Chevron environment. The value of having a non-IT person in this role was that he was completely oriented towards the business user community, and, in more ways than one, this was more important than any other consideration. However, in general, making technology decisions without the support of a capable IT professional is not recommended.

It may be that the role of *BPM Technology Specialist* is filled by a team of people rather than a single individual. For example, a team member who specializes in BPM interactions with ERP systems might provide a useful perspective on extending the value of ERP investments via BPM. However, irrespective of the other competencies on the team, it is wise to ensure there is a lead *BPM Technology Specialist* who keeps the end-user perspective prominent.

### **BPM Technical Support Group**

At Chevron, it took a few attempts to get BPM technical support right. Many BPM applications require a level of administration and application knowledge that is atypical of most applications. Of course, the objectives are the same—namely, to offer a reliable application that performs at adequate speeds (i.e., low latency).

Here are a few suggestions regarding the *BPM Technical Support Group*:

- Select BPM technical support personnel who have experience in supporting complex applications.
- Devote adequate resources to training the *BPM Technical Support Group* in the administration and support of the BPM software products.
- Put the *BPM Technical Support Group* in direct contact with the product vendors' technical support personnel, and encourage a strong and open relationship.
- Establish a searchable database to capture BPM software issues that arise and their solutions.
- Establish a development or test environment for the BPM software in which administrative changes, configuration changes, software upgrades and patches can all be tested before deployment into the production environment. Then, plan the changes and upgrades such that they minimize disruption to the user base.
- Minimize the number of BPM technical personnel with administrator privileges.
- Consider positioning the *BPM Technical Support Group* as the first line of response to questions about features of the BPM applications. Most likely, an organization's

experienced BPM Consultants and automation solutions developers—as well as the vendors themselves—will be deeper sources of expertise than the *BPM Technical Support Group*, but it is nice to not have to bother them for routine questions.

Once Chevron had established a mature BPM technical support process and competency for the BPM software that had been selected, there generally were few disruptions and the total manpower devoted was only about half a resource—except for the occasional spikes in resource requirements during testing and deployment of new releases. At that point, the role was subsumed under the normal Help Desk function.

### Lead Automation Solutions Developer

In its current state of development, the complexity of process automation software is such that IT solutions developers will be required if the organization plans to develop process automation capabilities. In the most mature state, the “Lead” role would be a senior developer who would facilitate a community of globally-dispersed developers—namely, *Lead Automation Solutions Developer*.

The vast majority of enterprises have the potential to gain from automation in many ways. Process automation solutions may span locations, but they need to operate effectively at the task level, and are therefore potentially numerous, “touching” people in various ways depending on their individual roles. As a result, a network of process automation practitioners who are spread across the enterprise is a practical way to effectively integrate process automation solutions into local practices, including addressing required variations from the standard process due to local requirements. WellsFargo Bank exhibits this “network of automation practitioners” model.

It is worth mentioning that a vision of business managers being able to readily develop and change process automation solutions was proposed by Fingar and Smith in their book, “Business Process Management: The Third Wave<sup>1</sup>.” Some BPM software vendors also maintain this vision and even promote their products as being able to achieve it—but it may be wise to remain skeptical of such claims. Most process automation solutions are simply too complex to develop as if working with interchangeable Lego pieces. Perhaps this vision will be achieved in the future, but for now at least, it is advisable to fill the *Lead Automation Solutions Developer* role with a highly capable technical person.

It is a major decision for a company to develop process automation capabilities in a systematic way. Some companies may delay

the development of the Process Automation capability building block (CBB) until they have achieved high levels of maturity in the other BPM CBBs. On the other hand, some IT organizations may develop the Process Automation CBB almost exclusively if the value proposition for process automation is high. The timing and importance placed on the *Lead Automation Solutions Developer* role will be influenced by the organization’s strategies. If cost reduction through process automation is an important strategy, then filling the position will be urgent.

Suggested activities for the *Lead Automation Solutions Developer* are:

- If the software platforms for process automation are not already in place, collaborate with the BPM Technology Specialist to evaluate and select appropriate software platforms for process automation.
- Develop a method to identify and quantify process automation opportunities that you come across within the organization. At the outset, the method may be somewhat crude, but it can be continually refined.
- Form and facilitate a global Community of Practice for Process Automation. Ideally, each business unit and major department will eventually have at least one process automation solutions developer. Schedule monthly meetings so all process automation solutions developers can participate at reasonable times of the day; duplicate or triplicate meetings with the same agenda may be required for global organizations that span multiple time zones.
- Personally lead process automation projects. The *Lead Automation Solutions Developer* does not have to be the most experienced developer, but they should be competent enough to garner respect from the BPM community and to lead complex projects. By keeping a hand in the development effort, the *Lead Automation Solutions Developer* will be better placed to guide new developers and to contribute ideas for the next generation of process automation technologies.
- Understand the opportunities for process automation and find ways to test them without introducing high risks.

At the time of writing, Chevron had only begun to dabble in the automation space. In 2009, a workflow proof of concept project was undertaken for Chevron’s global manufacturing division. The results were very promising, and a lot was learned about what it would take to become competent in the process automation space. In mid-2010, actual process automation projects using a common technology received funding. However, at the time of writing, Chevron has not yet appointed a *Lead Automation Solutions Developer*. Widespread, on-the-job development of competencies through grassroots efforts may be the pattern that

<sup>1</sup> Howard Smith and Peter Fingar, “Business Process Management: The Third Wave,” Meghan-Kiffer Press, 2007

emerges. At some point in the future, if process automation solutions prove to be successful, such competencies might be consolidated under a discipline leader at the enterprise level, but there is no guarantee that will happen.

The role of *Lead Automation Solutions Developer* and the roles of *BPM Technology Specialist* and *BPM Technology Support Group* have technical facets to them. Although the skills required for each of these roles are distinct, a high-caliber IT person could simultaneously perform both the *BPM Technology Specialist* and the *Lead Automation Solutions Developer* roles. Most likely, this person would prefer to hand off technical support responsibilities to IT operations. However, in the early stages of developing BPM technology capabilities (before adequate resources have been allocated), division of responsibilities may not be an option and a competent IT person might perform all technical roles for a period of time. The upside is that such responsibilities would provide the assigned IT person with the opportunity to learn about the technologies in depth, and they would then become an expert on all aspects of an application.

### **BPM Consultant**

An internal *BPM Consultant's* first task in engaging an organization which thinks it wants to "do BPM," is to understand the context in which the BPM effort is being made. In many cases, the business people who think they want to do BPM do not understand the extent of their options. The BPM Consultant must clarify the options. To achieve this, here are a few of the relevant questions to ask:

- What processes are in scope? What are the objectives of the project? Is the objective simply to clarify processes so everyone can follow best practices consistently? Or is the objective to make significant process improvements? Is it expected that processes will not be automated, or that they will be partially—or entirely—automated?
- After the BPM effort is complete, is there an intention to simply train process performers in the new process, perhaps giving them some hardcopy job aids, and then move on (this is the traditional external consultant approach and may be what the organization's management will assume to be the case)? Or is there an intention to keep the process "alive," updating it as requirements change, and perhaps maintaining it in a general process repository where the initial scope can be expanded and where people can check to see the latest version of the process?
- Will someone in the organization be learning how to maintain the documented process model, or will the process model be dependent on a BPM consultant for further changes? Will there be a process owner or advisor to whom ownership of process

artifacts can be handed off after the project is complete?

At Chevron, the BPM Support Group created a Statement of Work (SOW) for BPM Consultants to use when they engaged with a new client. The SOW was structured to elicit answers to the type of "scope and objectives" questions detailed above. The SOW also sought to clarify the responsibilities of the BPM Consultant vis-à-vis the BPM project in terms of role, duration of the project, and percentage of time committed to the project. It may be appropriate to introduce such rigor once the BPM effort has gained some traction—but in the early stages, when those promoting BPM are looking for any willing partner to "give it a try," such an SOW might scare off potential partners. Nevertheless, in general, an SOW for consulting engagements will act as a useful filter for excluding low-value efforts, it will help to manage demand, and it will immediately lend a sense of professionalism to the BPM consulting function.

It is important to recognize that not all people will have the attributes to be good *BPM Consultants*. As noted in Table 2, *BPM Consultants* need the usual excellent facilitation and interpersonal skills; but they also need to be able to move fluidly between two perspectives—big picture, high-level perspectives and detailed, low-level perspectives. When convincing management of the merits of implementing BPM in an efficient and effective way, *BPM Consultants* must address the *big picture*; including *high-level perspectives* such as management objectives for BPM, scope and objectives of target processes, and plans for governance and sustainability. On the other hand, *BPM Consultants* will also work with Subject Matter Experts (SMEs) to capture *detailed, low-level* tasks and issues. When in process modeling or mapping sessions, the SMEs themselves may be inclined towards broad generalizations or minute detail. It is the *BPM Consultant's* job to help the SMEs think at a level of abstraction appropriate to the exercise.

A cardinal rule for *BPM Consultants* who are working to capture an organization's business process is this: *Before proceeding far, be explicit about the desired outcomes of the process.* It is not enough to understand the purpose of the process; the actual outcomes—whether information or physical products—should be specified in the first session. If the *BPM Consultant* perceives that there is any uncertainty about the desired process outcome(s), it may even be worth taking time to develop detailed specifications of the outcome(s) by first talking with the customers of the process.

This point undercuts a spurious criticism about process management—namely, that it is about *activities* rather than *results*. In fact, process management should be greatly focused on

results—and the activities of the process, whether human or machine, are simply the means to produce the desired results. It is the *BPM Consultant's* responsibility to ensure the desired outcomes of the target process remain visible throughout the exercise.

With regard to BPM technologies, *BPM Consultants* need to be skilled in whatever application is used for collaboration with business people on processes. However, it is not expected that most *BPM Consultants* would be able to develop automation solutions using workflow platforms and services (these will be developed by the Lead Automation Solutions Developer, as discussed earlier). The distinctions between the technologies that serve different needs, and the people who will use those technologies, will be covered in greater depth in a future white paper on the subject of BPM Technologies.

Of course, *BPM Consultants* are concerned with additional activities other than process modeling. They also facilitate process improvement (calling on experts with Lean Six Sigma or other process improvement skills as needed), process automation (calling on automation experts as needed), and the launching of processes so they can be effectively managed on a sustainable basis.

As BPM matures in an enterprise, the conversations will gradually become more about the approach for an overall sustainable process management program rather than the modeling of a specific process. In other words, the focus will be about the *process of process management*. Certainly, the individual processes that are specific to the organization will be worked on, but they will be worked on within the context of a process management approach that is being led by management.

A truly mature BPM Support Group may distinguish various forms of *BPM Consultants*—strategic BPM program consultants, process modeling consultants, process improvement consultants (e.g., Lean Six Sigma Facilitators), and process automation consultants. The personnel performing these roles must work together seamlessly, contributing the right skills to serve the business objectives. For the purposes of this discussion, many skills have been grouped under the title of *BPM Consultant*, but it is a lot to expect one person to have expertise across the entire BPM implementation landscape. Nevertheless, the person leading a BPM project must understand when the various skills should be applied and know who to call when particular skills are needed. As an organization matures, many of the BPM consulting roles may not be considered part of the BPM Support Group. Instead, a few experts may exist in the BPM Support Group—but many of the consulting resources are likely to be embedded in business units and departments close to where work gets done.

The methodology used by a *BPM Consultant* for process modeling will be addressed in a future white paper on the subject of BPM Standards and Methods.

### **BPM Promotion Specialist**

Perhaps there will come a day when the value of BPM is so evident that it will be unnecessary to explain it or to persuade people about it. However, that day has not yet arrived.

If one buys into the proposition that BPM is, in fact, valuable, then it seems that the primary challenge is to help others understand that value. Though it is a simple proposition in theory, this may be the hardest role of all.

Needless to say, the person who holds the primary accountability for this role of *BPM Promotion Specialist* will require strong interpersonal and communication skills. Perhaps this role will be performed by the manager of the BPM Support Group (possibly in conjunction with BPM competency management), but they may get help from other members of the team who are particularly adept at communications and marketing.

Although numerous stakeholder groups, including all employees, are important to the *BPM Promotion Specialist*, those who can sponsor—and fund—BPM efforts are among the most important. Methods of reaching managers (who might sponsor BPM projects) and senior managers (who might sponsor BPM programs) include face-to-face meetings and presentations about BPM. Successful case studies, especially ones from inside the enterprise, are often most powerful. And, as always, case studies will be more convincing when there is a link to increased profits or other strategic objectives.

The *BPM Promotion Specialist* will need to consider propagation of key messages through many channels:

- Demonstrations of enabling technology. More than 100 demonstrations of BPM software were given within the first three years of its introduction at Chevron until it became established as an enterprise standard. The difficulty is: line managers—and especially senior managers—usually do not relate much to technology. So, the targets for such endeavors are often project managers and mid-level personnel who have responsibility for addressing process issues. One works with them in the hope that they can convince their bosses that they have found a technology worth using.
- Web-based information. For example, Chevron has an extensive online library of BPM information that is customized for use in the Chevron environment.
- Case studies.
- Information seminars—for example, during lunch breaks.

- Communities of Practice for those driving (or trying to drive) BPM in their organizations. One might be surprised by the number of people across the enterprise who are eager for expert knowledge, standards, and methods.
- Internal newsletter articles.

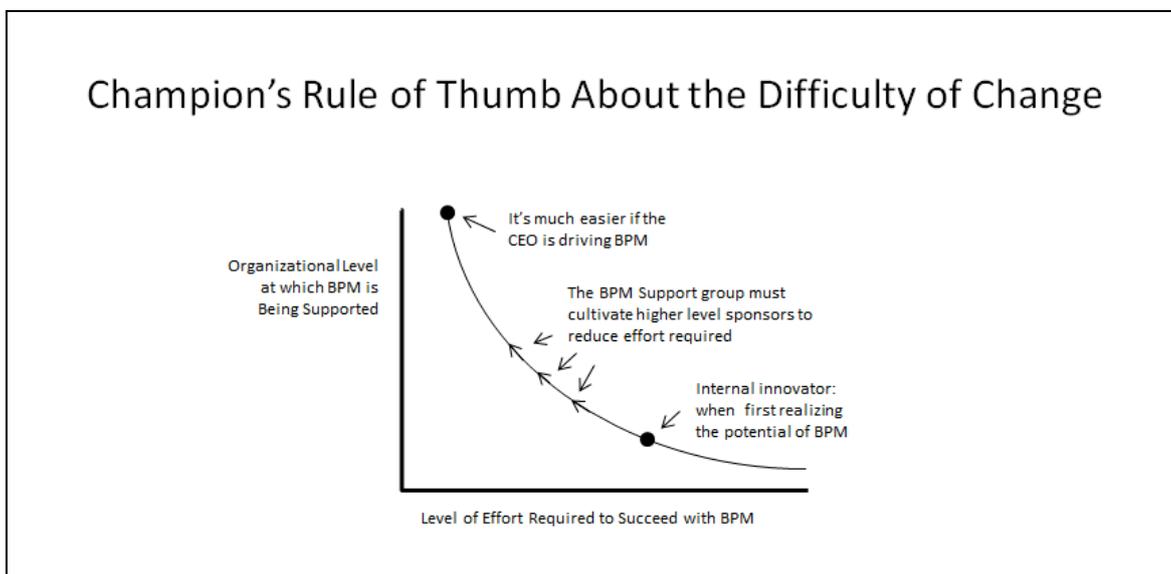
Here are a few lessons learned regarding building enthusiasm for BPM:

- Do not rush out with a comprehensive message too quickly. A new BPM Support Group almost surely will not fully comprehend what the message should be until some experience is gained. Instead, focus on learning, and hone messages with the team and with those who are most receptive.
- Initially, before there are many (or any) internal examples of BPM success, tailor messages to the individual manager according to their expressed needs. Usually, the expressed needs will be at the process level rather than at the architectural or process-set level. Explain how process modeling can clarify where there are opportunities to improve reliability, efficiency, quality, or whatever other parameter the manager considers important. This is not a hollow claim because even something as simple as documenting a process can contribute to improvement in any of these desirable attributes. Essentially, the objective is to run proof of concept projects from which learning is achieved and, with luck, from which success stories and case studies can be derived.
- There is a good chance that of those people with whom BPM is first discussed, less than half of them will relate to the potential of BPM. Look for opportunities with those who are natural visionaries and, using diplomacy

and courtesy, let the others who do not see the potential (or see it as an unnecessary complication, or even as a threat) off the hook without pressing them for any further commitments. They may come around later, but, frankly, the BPM Support Group needs to spend time efficiently with those who offer the opportunity to get some activity underway.

- Be persistent in refining messages that will spark the interest of higher levels of management. The higher the level of the person who is a passionate force behind the BPM effort, the easier success will be (see Figure 2). Part of the responsibility set of the entire BPM Support Group is to seek ever-higher levels of management sponsorship for BPM. Everyone involved in trying to increase BPM capabilities should understand where the organization sits on the curve of sponsorship. At the time of writing, Chevron's CEO and Operating Company Presidents probably are not deeply aware of BPM capability beyond Lean Six Sigma being practiced in Chevron. Unfortunately, this is a common occurrence for many BPM practitioners in enterprises across the globe. BPM devotees may achieve some modest successes, but senior management never takes much notice for any of a number of reasons. Regardless of the possibility of being ignored, the BPM Support Group must keep trying to raise the level of BPM sponsorship. Only when BPM connects directly to achieving goals for which sponsors are accountable will senior management pay close attention. Because executives have many solutions offered to them for achieving improved performance, it takes practice and persistence to stand out.

**Figure 2: Rule of Thumb about Difficulty of Implementing BPM depending on Level of Sponsorship**



## BPM Champion

Typically, the role of *BPM Champion* is not a position on an organization chart. Perhaps the person assuming this role has a title of BPM Consultant or some other generic title. Or perhaps someone who has been appointed Manager of the BPM Support Group takes on this role. In some circumstances, there may be several strong players involved in the BPM effort who collectively represent the *BPM Champion* role.

The *BPM Champion* is the person or persons who have the passion and knowledge to nurture BPM for multiple years to the point where it is considered a sustainable capability of value for the enterprise. If they are self-selected, the *BPM Champion* will often start out playing essentially all the roles discussed in this white paper, but they must quickly try to secure additional resources. If the BPM initiative is being sponsored by senior management, then putting additional resources in place should be easy. Just ensure the people who join the effort are competent!

But, as a self-selected *BPM Champion*, how might an initial foothold be gained so more resources are allocated to BPM? Here are three ways, which can be combined, to gain a BPM foothold with minimal initial management sponsorship:

1. *Devote a portion of one's own resources to BPM development.* A supervisor or manager of a group, or a project manager, could devote some of their own resources to the development of BPM capabilities. This can be done by applying the principles and tools of BPM to the set of processes under one's area of responsibility. For example, in 2005, a manager had responsibility for the Health, Safety, and Environment (HSE)-related processes for Chevron's research company. While looking for better ways to convey process information (Microsoft Word documents were the standard at that time), he was introduced to useful BPM software. Within his budget, he was able to devote some funds to clarification of the HSE processes using the BPM application. Equally important, he was able to devote some of his time and half of the time of one of his staff to the development of BPM capabilities, including development of technical support for the application.

There are drawbacks to this approach. First, these days most managers have to fight for every resource they can get, and it is hard to devote even a small portion of that resource to effort that has slow payback. Furthermore, early learning will be slow for everybody involved; it may seem as if resources could be better

spent on simpler approaches to achieve expected levels of process reliability. Nevertheless, if one has a budget, it is possible to inexpensively set up a small, low-cost BPM R&D operation. There are some BPM technologies now available that cost less than US \$20,000 to get started.

2. *Convince someone, e.g., a project manager or a manager with persistent performance problems, to use a BPM technology or methodology.* However, if one tries this, one had better have something concrete and worthwhile to offer. Perhaps, for example, a BPM approach and/or technology will make it easier for people to engage in collaboration on processes. In the early BPM days at Chevron, a BPM technology served that purpose, and some of the people who received demonstrations of BPM technology were convinced it was game-changing enough to try it instead of technologies they were more familiar with. Eventually, enough people were using BPM technology for it to have a life of its own. This became the seed from which the rest of the BPM effort at Chevron grew.

One of the challenges with this approach—if relying on software to open the BPM door—is figuring out how to introduce the software into the enterprise without incurring large upfront costs. Be creative—with the vendor and with the mechanisms for recovering costs. Clarify circumstances to the vendor and ask for help in getting a foothold. In addition to receiving creative help from the BPM software vendor, the *BPM Champion* at Chevron was able to set up a monthly subscription service for users of the software which enabled them to avoid large capital outlays. However, that required approval for the initial capital expenditure for a block of software licenses. Other *BPM Champions* may not be so fortunate. Today, most vendors also offer hosted solutions which can be a way to keep initial costs down—even if the long-term vision is to host the technology on-site.

3. *Get involved with existing capabilities or initiatives, and look to extend them to encompass BPM capabilities.* Many organizations have active Lean Six Sigma, Operational Excellence, or other such long-term initiatives that have a significant linkage with process management. Talk with the people involved in these initiatives to explore the weaknesses in their initiatives. For example, one of the weaknesses in many Six Sigma initiatives is that the Control

("C") part of the DMAIC<sup>2</sup> methodology is not backed up by a process management approach that keeps the improved processes alive and further improving. BPM can help with this, and a *BPM Champion* may be able to persuade the Lean Six Sigma leader to incorporate BPM technologies and other capabilities into the organization's methodology.

Early in Chevron's BPM journey, the *BPM Champion* had been deeply involved in Chevron's Operational Excellence initiative. Knowing the language and shortcomings of that initiative, he was able to frame BPM-based approaches in terms that resonated with others. He also reached out, early on, to the leader of Chevron's Lean Six Sigma program to forge a personal relationship with him and to develop a common understanding with him of the relationship between BPM and Lean Six Sigma. That connection was invaluable.

Even if one has been appointed to some position in which one is considered to be a *BPM Champion* and has a mandate from management to develop BPM capabilities, the approaches described above will help inculcate the BPM approach into the organization's culture. If one has the backing of senior management, then willing participants should be considerably easier to find. However, this does not mean that turning the initial opportunities into success will be any easier. Until the patterns of success are understood, the early projects will require "feeling one's way" towards success. It is an uncomfortable feeling for many people to dive into a project with so many uncertainties. The risk, of course, is that the uncertainties bite, the project fails to achieve its objectives, and one's credibility rating drops. At Chevron, BPM benefited when the Commercial Division of Chevron Shipping Company selected and proved the usefulness of the BPM software that Chevron has now used for the past six years.

In some cases, a significant part of the role of the *BPM Champion* will be to pull together already-existing, process-related competencies into "one BPM function." In theory, this will be better than starting from scratch. Nonetheless, it is likely that those with power and influence in the existing competency areas will require their needs and the needs of their clients to be addressed before they will agree to any merging of competencies under one BPM umbrella.

Unfortunately, throughout the world, managers in organizations who have responsibility for driving process management in their organizations, upon

close questioning, will reveal that not much has been done other than making presentations, giving some training, or working with a few project personnel to draw Visio diagrams—even after a couple of years on the job.

The bottom line is, a *BPM Champion* has got to be somewhat aggressive about trying things—even slightly risky things—if they are going to learn at the rate necessary to make a difference. Most likely, failures will be part of the journey—but they represent great opportunities to increase knowledge and maturity.

In the early days of BPM, the *BPM Champion* is the heart and soul of the effort. Without a *BPM Champion* to sustain the effort and drive it forward, it will be difficult to reach a position that even approaches sustainable BPM capability, let alone achieves it. If an organization waits until every decision or path is low-risk, then BPM will have become a mainstream capability across industries, champions will be less critical for success, and any opportunity for competitive advantage will have been missed.

In this series of white papers, a considerable amount of the discussion is devoted to the attributes, responsibilities, and challenges of the *BPM Champion*. The premise is that the better a *BPM Champion* performs, the more successful the BPM initiative is likely to be.

### Summary

Those with key roles in a BPM initiative will have a significant impact on whether it is successful or not. This white paper explains and clarifies the responsibilities associated with such roles. One or more people will be fulfilling key roles to the extent of their abilities. A primary benefit of providing *more* rather than *fewer* resources is quicker progress in establishing the BPM foundation that will enable widespread improvement throughout the enterprise.

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<sup>2</sup> Design, Measure, Analyze, Improve, Control

### **About the Author**

Jim Boots worked at Chevron Corporation for 30 years in a wide array of functions including sales; total quality management; business development; supply chain management; business management; e-commerce management; health, safety and environment management; enterprise architecture; and BPM program development. Jim was the primary force behind the building of Chevron's BPM foundation from 2005–2010. He also is a Principal IT-CMF Professional at the Innovation Value Institute with responsibilities that include a role as lead architect of the BPM Critical Capability. He now runs his own BPM consultancy known as Global Process Innovation. Jim can be contacted at [jimboots.gpi@gmail.com](mailto:jimboots.gpi@gmail.com).

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