

BPM and SharePoint: User Stories in Business Process Management

Deborah Miller



EndUserSharePoint.com

© Copyright 2011 Deborah Miller

No part of this publication may be reproduced, stored in a retrieval system, or transmitted, in any form or by means electronic, mechanical, photocopying, or otherwise, without prior written permission of the Deborah Miller.

Table of Contents

Introduction	4
Remember Minority Report?	6
SharePoint: Find your Productivity Loop	8
Backslide	10
Don't talk to customers	12
SharePoint: It's not just a destination, it's a journey.....	14
The Power of Positive Pessimism.....	16

BPM and SharePoint: User Stories in Business Process Management

Introduction

There is a constant and natural tension between those who favor *process* and those who favor *content* as the best focus for achieving meaningful business improvement. Your personal perspective will be shaped by professional history, your current role in the organization, and often by the nature of the particular challenge you presently face in your change initiatives.

I believe that the essential question to consider is: ***How can I get the most value from information?***

Certainly, business processes are essential as the engines of work activity. They move you forward in your daily job, help propel strategic initiatives, and perhaps most important, give you the framework to make and implement business decisions. And because information fuels business decisions, it is most valuable when properly served and effectively consumed by your critical business processes.

The conclusion then is that ***process and content together*** are a powerful means to make better business decisions and drive significant operational improvements.

So whether you are *Team Process* or *Team Content*, I hope you will find this collection of best practice articles insightful. These stories exemplify how commercial and government organizations are using powerful content tools like SharePoint with Business Process Management (BPM) practices and technology to drive better business results.

1. [Remember Minority Report?](#)

The series begins with this article about effectively using data in complex mission critical law enforcement processes like LA County's DNA collection and tracking application. The recipe for success here is the ability to securely access data that has been kept locked away in paper vaults or in document management repositories like SharePoint, and make it available in a meaningful way to the process participants.

2. [SharePoint: Find your Productivity Loop](#)

This article looks at achieving competitive advantage in your industry and considers what you might achieve for example by using BPM to process-enable your supplier data in SharePoint and improve your supply chain cash flow. Examples are drawn from the retail sector including Wal-Mart and Lowe's.

3. [Backslide](#)

My favorite article in the collection deals with how to make process improvements that stick. Backslide is exactly what can happen with your business change efforts. If you don't pay attention to making change stick, the advantages you've gained from process improvement initiatives like BPM will disappear. Use of a familiar interface like SharePoint surrounded with an intuitive experience will enable faster time to business value with change that is also sustainable. With thanks to my co-authors <http://yfrog.com/jp5kedj>.

4. [Don't talk to customers](#)

This article deals with responding to customers more effectively. For example, automating activities like claims disputes so you have more time and energy to engage meaningfully with your customers. Real world illustrations include major brands Kraft, Revlon, and adidas.

5. [SharePoint: It's not just a destination, it's a journey](#)

How to help people gain visibility into their work and have a real time view of status? This article uses examples from government and the financial services and supply chain sectors that illustrate how content and process together can help when things don't go as anticipated.

6. [The Power of Positive Pessimism](#)

A winning attitude can make all the difference in today's economic climate. This article addresses the need to consider people, process, and technology to drive effective business improvement. It issues a challenge to the reader and shares four proven best practices to outperform the market.

I'd be interested in hearing about your experiences, and other ideas, thoughts, and comments, so please share your stories, successful methods, lesson learned and results of combining content and process. <http://debsq360.wordpress.com/>

Remember Minority Report?



In the year 2054 crime is virtually eliminated from Washington D.C. thanks to an elite law enforcing Pre-Crime squad led by Tom Cruise who catches the criminals before they commit the crime. That's the premise of Minority Report, a Spielberg movie that depicted a world where we can predict and prevent crime. It was packed with some awesome futuristic technologies. Today, elements of the Minority Report sci-fi story have become reality. The interactive screens used by the pre-crime detectives are everyday now, and advanced gesture-based capabilities are on the way. Though our mall stores might not recognize us from our iris scans as they did in the movie, the Pentagon has funded technology that successfully scans eyeballs to identify threats. **And, while we haven't figured out how to stop crime before it happens, we are doing a better job managing our criminal justice information for the greater good.**

The recipe for success in my view is the ability to securely **process-enable data** that has been kept locked away in paper vaults or in document management repositories like SharePoint, and make it available in a meaningful way to the process participants. SharePoint can provide strong document sharing capabilities but only basic workflow capabilities to support simple processes such as document approval. When you need to automate complex, mission critical processes, that's the time to turn to business process management tools.

Consider DOTS – the DNA Offender Tracking System – and the impact it has had on solving current crimes and cold cases for California's Los Angeles County. The system, based on business process management technology, has significantly improved the complex DNA collection tracking process. By way of background, several years ago California passed Proposition 69 to expand the collection and use of criminal offender DNA samples to help solve crimes and increase public safety. Proponents of the proposition hold that requiring convicted felons and arrests for rape or murder to submit DNA helps solve crimes and prevents false imprisonment. In LA County, the responsibility to collect DNA samples from eligible offenders is shared among 40 law enforcement agencies. Faced with more than 1,200 criminal arrests every day, as well as more than 21,000 incarcerated inmates, LA County uses DOTS to provide an automated, collaborative, and rules-driven way to identify and determine a suspect or inmate's DNA collection status, while assuring legal compliance with the DNA collection eligibility legislation.

Before DOTS, when a DNA sample was collected, officers completed an accompanying paper card, which took 30 minutes and might have inconsistent or illegible information. The sample was then sent to the state, where it sometimes took a month to process and update the criminal history system. The lack of a centralized system led to duplicated work by officers and multiple DNA samples from suspects. Now, DOTS automates the DNA collection process and lets officers know if an offender's DNA is already in the system. DOTS provides a better way to collect, track, and also exchange and share DNA information with other state, local and federal agencies. DOTS helps to drive significant productivity for the officers while ensuring appropriate DNA evidence is available.

Doing a better job means effectively process-enabling the data, but it also means enabling the people in the process as DOTS did with law enforcement officers. After all, Minority Report was really about the people. In fact, Tom Cruise's character is a "knowledge worker" who relies on a group of 'pre-cog' psychics that, together, dream of murders that have not yet taken place. The data emanating from the psychics is projected along with enough other information for the team, who - with the help of their expertise and the technology - determine where the crimes will take place and stop the crimes before they happen.

So what data are you keeping in SharePoint? What "knowledge workers" could benefit from that data? Are you using process to liberate that data and turn it into actionable information that could better serve your stakeholders? I'd be interested in hearing about your experiences and your ideas on barriers to overcome and benefits to be achieved from process-enabling SharePoint.

Original Article with Community Comments

<http://www.endusersharepoint.com/2010/06/16/remember-minority-report/>

SharePoint: Find your Productivity Loop



Wal-Mart is once again on the annual Gartner AMR Research [Top 25 Supply Chain](#) list – at #4 this year. Love them or hate them, Wal-Mart has always competed brilliantly on the basis of their supply chain, focusing on their distribution efficiencies and using IT to help them drive economies of scale. Now in their latest initiative, they are taking over transportation from their suppliers to reduce the cost of hauling goods. **The strategy is part of what Wal-Mart calls its “productivity loop”** – efficiency ultimately reflected in

lower bills for shoppers at the cash register and an increase in sales for Wal-Mart stores.

To me, one of the most interesting elements of this latest Wal-Mart move is the nature of the competitive advantage it gives them. Apparently a side effect is that manufacturers may face increased transportation costs on deliveries to other retailers as they lose scale. Those increased shipping costs more than likely will be passed on to other retailers. In the [Bloomberg BusinessWeek article](#) I read, former Wal-Mart executive Randy Huffman comments, “That aligns with Wal-Mart’s taking cost out of the supply chain for their benefit and not their competitors.”

So, what is your competitive advantage – have you found your productivity loop?

If you’re not the world’s largest retailer like Wal-Mart, or even if you are, you need to constantly consider what your company can do to stay ahead of the competition. While the physical flow of product over the supply chain is one place to find productivity gains, the financial and information flows hold great potential as well. In my experience, the intersection of IT and the supply chain is a great place to lower your costs and increase your yield.

How to do this?

Well, do you have SharePoint in your enterprise? Wait for it...of course you do. Then consider what you might achieve for example by using BPM (business process management) to process-enable your supplier data in SharePoint and improve your supply chain cash flow.

Take Lowe’s for example. They process-enabled their supplier data and adopted better payment discipline to enable accurate payments against their supplier SLAs. Companies like Lowe’s also use process and document management solutions to improve accounts payable productivity across the board, eliminating errors that cause delays and unnecessary adjustments, such as goods being received for which no invoice has been generated, or vice versa. This can work all along the supply chain! CIBA Vision used BPM and increased their invoice processing productivity by 37% and improved document turnaround from 5 days to less than 24 hours.

One industry stat found that an **average worker spends 20% of working hours searching for previously created docs or emails**. You could beat that stat for your supplier payments, using SharePoint and BPM for a really reasonable TCO (Total Cost of Ownership) to avoid situations where the worker needs to track down information. As a result, you avoid delaying the process

and missing your time-sensitive vendor discount terms – in effect, you pay your suppliers “just in time.”

The idea of paying your suppliers “better” – okay, “just in time” – to maximize your cash flow on discount terms is just one example for a “productivity loop” advantage. I’d like to hear your ideas for using SharePoint and process improvement to contribute to supply chain efficiencies for your business.

Original Article with Community Comments

<http://www.endusersharepoint.com/2010/06/21/sharepoint-find-your-productivity-loop/>

Backslide



For those of us who consider ourselves lucky to have a Golden Retriever in our lives (apparently 98% of Boulder, Colorado), the term backslide instantly resonates. GRs are infamous for being super responsive to behavior change, meeting and exceeding our expectations in obedience, agility and tracking. Then, over time, they backslide to their previous erratic behaviors. Backslide is exactly what can happen with your business change efforts.

If you don't pay attention to making change stick, the advantages you've gained from process improvement initiatives like BPM (business process management) will disappear. In a recent Blog entry, Gartner's Jim Sinur talks about [Elastic Behavior: The Bane of BPM](#):

"It is sometimes difficult to change behavior. BPM causes people to have to change the way they do their work and behave. One of the dangers of BPM is to develop a cost cutting and even innovative process that works for a while and snaps back to traditional behavior... Sometimes this is because the process needs to get better, but often it is just resistance to change."

So how do you make change stick and avoid backslide? Here are a couple user-centric ideas that have been successful for me:

- ***Put a CAP on it to engage users for change.*** CAP – Change Acceleration Process – is a discipline I used extensively at General Electric to drive operational efficiency and productivity improvements in the business. User process acceptance is one of the fundamental principles underlying CAP. CAP is focused on overcoming resistance to change and increasing the success of change efforts by emphasizing not just the quality of the technical solution, but also the role that stakeholders play in process change. CAP centers on the need to consider how people will embrace, accept and adopt change resulting from your process improvement efforts. I recommend checking it out and using it in conjunction with your chosen process improvement methodology.
- ***Use the familiar to make change stick.*** Being user-centric and attuned to user behaviors enables faster time to business value with change that is also sustainable. I've found that use of a familiar interface like SharePoint and surrounding it with an intuitive experience can significantly help to engage users and speed adoption. And, a good way to make change stick is by creating an interface that delivers content within the context of the work that is done every day. When you get the user-centric emphasis right, the results can be outstanding.

One of my favorite examples is Irish Life, one of Ireland's largest and most successful financial organizations. Irish Life faced excessive turnaround times managing over half a million policies. There was no visibility of where work was in the process and the number one customer complaint was response time. Irish Life's BPM solution removed paper from its processes and integrated the policy and supporting documents into the process flow, resulting in improved

customer turnaround time and consistency, management visibility into all work statuses, and a 35 percent improvement in productivity. In order to accomplish these improvements, Irish Life included their process participants and stakeholders in the improvement initiative. By focusing on the user, Irish Life changed “how the work gets done.” In effect, they improved the worker experience, rather than merely adding speed to old and potentially ineffective ways of working or worse yet, changing the work without regard to the user view. From a people perspective, the system has made a huge impact. Employees have recognized and embraced the improvements being driven by the BPM solution, and to date no backslide is evident.

I’d like to hear your experiences around use of the familiar to accelerate adoption of process change. Have you been involved in using SharePoint to help drive process improvement changes? What techniques have proven successful for you in making change stick?

And BTW, if you have any tips for avoiding backslide with Goldens, I’d really like to hear about that too.

Original Article with Community Comments

<http://www.endusersharepoint.com/2010/06/25/backslide/>

Don't talk to customers



Companies need to stop talking to customers? Yes! That is, stop wasting your time and your customers' time talking about items like credit disputes or missing approval documents. Instead, you can automate and streamline key processes like dispute resolution using business process management (BPM) and SharePoint. You'll have more quality time then to *listen* to your customers, and to apply your people and technology resources to engage in meaningful dialogs that explore consumer demands, product interests and service priorities.

Meet customer expectations. Customer satisfaction isn't everything, it's the only thing! That means that a service mindset is critical. Close to 80% of the U.S. economy is services-based, and even for product-based companies, services are quite often the fastest growing part of the business*. Further, services are increasingly being used by companies to differentiate and gain advantage over the competition. If you're in the Insurance industry, that might mean a focus on better approaches to managing customers through multiple channels – brokers, agents, online and more. In Banking, efficient customer on-boarding, new account opening and servicing are considered critical to success. And, in the supply chain sector, meeting customer SLAs (service level agreements) can be the singular difference to surviving in the current challenging economy.

Address “white space” challenges. A major challenge for manufacturing companies is that they typically don't capture enough granular data in their Order-to-Cash systems to make headway against processing accurate deductions. They can't easily and effectively access the data in context to do dispute resolution when exceptions occur. Many companies either lack the requisite operations staff to address the situation or they simply don't know what steps to take to attack a problem that involves multiple applications and organizational units.

This is so much more than just a simple workflow problem. To improve performance in the “white space” – the touch points between your application systems and organization silos – you'll need to go beyond basic workflow. This is a perfect scenario where process-enabling SharePoint with BPM can help you devise the right solution and achieve the desired results.

Deliver visibility and consistency. Well known brand companies like Revlon, Kraft and adidas use business process management to set and meet KPIs (key performance indicators) and cut the time required to turn around customer disputes and claims processing. By using a content-aware BPM solution they prevent unnecessary losses on claims simply because documents cannot be found for verification and claims substantiation. With BPM, they organize the work, automate the aggregation of records, and simplify inter-departmental process hand-offs. All related documents—regardless of where they are stored—are consolidated into a single view, and work distribution and flow is optimized between the analysts, researchers, and other departments involved throughout the entire claims management process—from the time the claim is opened, through any exceptions to the resolution process, and all the way to record archiving. Manual intervention in the hand-off has been all but eliminated, and customer SLAs are now automatically tracked and managed. The result is not only improved consistency of customer

response, but close control of decisions that can affect profits. Revlon for example saw a break even ROI on their solution in 18 months.

The successful companies I work with all have a laser focus on their customers. They are continually looking for ways to control spending and cut costs, all while keeping pace with their peers to meet customer expectations. From a process improvement perspective, I think that SharePoint and BPM can deliver for your customers. What do you think? How about asking your customers what they think.

*U.S. Bureau of Economic Analysis

Original Article with Community Comments

<http://www.endusersharepoint.com/2010/07/09/don%e2%80%99t-talk-to-customers/>

SharePoint: It's not just a destination, it's a journey



I've been sharing examples in this series about the possibilities of process-enabling SharePoint to drive business improvement in different vertical industries. This example is a personal confession.

I recently participated in the Microsoft 2010 DC Launch event – actually held in Arlington, Virginia – and really enjoyed meeting some great SharePoint enthusiasts there. If you were at DC or one of the other launch events I'd be interested in hearing your experiences. This story is not about the event itself though; it's about what happened afterwards. Yes, after... when I got hopelessly helplessly lost on my way home to Maryland. This story is about my journey and what I learned about SharePoint and business process management along the way.

What happened? Despite living in the DC area for many years, I had never before visited the actual site for the launch event. I had printed out the maps and directions both ways ahead of time so I was all set. That's right, I didn't (yet) have a GPS in my car so was still going the paper route. That worked just great getting there, and was going well on the return trip until I missed a critical exit turn – or said another way, “an exception occurred.” Once that happened I was lost and with every subsequent turn I made it just got worse.

What did I do? I refused to admit defeat of course and kept driving until I couldn't even figure out how to get back to the launch event. At that point, I actually started thinking about the business analogy for what was happening to me. Yes, I really did; I am after all an admitted BPM-aholic. It occurred to me that if we keep our important data in SharePoint – our destination for doing business – how can we help people to use it better to accomplish their work? If you just use workflow to guide the work path – like my directions guided me – what happens when an exception occurs? And, how can we help people to gain visibility into their work and have a real time view of status? This is exactly where business process management (BPM) can be applied.

What do I mean? For those of us involved with [supply chain](#), this equates to BPM solutions that process enable our data to achieve the nirvana KPI of the “perfect order” – orders delivered on time, in full, damage free and with the correct invoice documents. BPM can handle logistics and invoice exceptions when an order fails to follow “the happy path” and help us to get orders back on track quickly. For Banking and Insurance it might mean better handling of NIGO (not in good order) situations for new policies or loans so that underwriters can [be more efficient](#). And for the government it can mean securely and easily electronically rerouting selected court orders for review and audit in time for the coming docket trial, or guiding law enforcement in the legal and proper situations to [take DNA samples](#) when an unanticipated “event” occurs.

So where did my personal journey take me? Well, I finally found my way home about 90 minutes late with an almost empty tank of gas. I was definitely embarrassed about getting lost

and thankful to the good Samaritans who gave me directions along the way. Good news is I've since implemented *my* BPM solution. I now have a Garmin 1490T in my car that organizes and safeguards my data, guides me on my way, knows when I'm lost – sometimes before I do – and helps get me back on track fast!

Original Article with Community Comments

<http://www.endusersharepoint.com/2010/07/26/sharepoint-it%e2%80%99s-not-just-a-destination-it%e2%80%99s-a-journey/>

The Power of Positive Pessimism



What if you could apply life lessons to improve your business performance? For this final entry of my 6-part series on [process-enabling SharePoint](#), I consider that question and share the lessons I learned from an inspiring “rock climber” and a group of “rock star” supply chain execs.

A few years ago I had the privilege to hear an incredible keynote speaker [Erik Weißenmayer](#) who lost his sight at age 13 and went on to be the first blind person to summit Mt. Everest. As an author, speaker, world-class athlete, and educator, Erik is an inspiration on many levels.

And his attitude, sense of humor and wit are truly remarkable.

As Erik tells his story, including tales of particularly tough mountain assaults, he punctuates the narrative with examples of what he calls “**positive pessimism**.” Two of my favorites are: “You may be blind, but you sure are slow!” and “It may be cold, but at least it’s windy!” These somewhat dark statements curiously make me smile (along with the rest of the audience) and also somehow make me believe that Erik and his team will overcome any obstacle in their path. As his story progresses, I go on the journey with them and share their summit.

Get an attitude.

Since that conference keynote, I’ve often reflected about the intriguing power of positive pessimism. Why I wonder does it evoke such strong feelings, and how might this compelling concept be applied to my business world? Then earlier this year I happened to read a great [interview](#) with Erik that helped crystallize my thoughts; in his own words Erik explains that:

“Positive pessimism is sort of a bit of a dark way of laughing at yourself and saying, ‘Hey, we may be facing a tough time right now, and it’s hard to see the light at the end of the tunnel, but we’ll get through this together.’... And there are big overwhelming challenges right now that we’re facing, but if you can make a joke about it, it’s sort of like you’ve pulled it into your control a little bit more than before... we’re in a challenging time right now, but when people are facing a challenge that’s their greatest time of growth. So this is the time to really be making ground, rather than just kind of digging in and holding ground and trying not to retreat. When adversity strikes, it’s a very pivotal moment where you can make really great progress in your life.”



As I read Erik’s interview response I realize... **positive pessimism provides extreme coping skills**. Now there’s a life lesson – sort of an ‘*oh yeah, well take that world!*’ attitude – that I can definitely apply to business.

Et voilà, here’s *my* first positive pessimism:

“You may be stressed, but at least everything’s getting more complex!”

If you’re not feeling the stress of daily business life and especially the added stress of the current economic crisis, then I seriously question if you have a pulse. Learning to operate in today’s pressured market and then in the “new normal,” as McKinsey has dubbed the post-recession environment, is a highly challenging shared experience across almost every industry in every geographic region, for both public and private sector alike.

So, my question is: what can you do when adversity strikes in the business world, especially in today’s economy? My answer: get an attitude ... and use technology to “cope” and you just might outperform the market.

Outperform the market.

I work with companies who are looking for ways to improve performance, leveraging technology like business process management (BPM) and SharePoint, to outperform their competition. That’s exactly what some leading supply chain executives are doing, with a combination of outstanding people, process and technology. In a recent AMR Research First Thing Monday post, Gartner’s Kevin O’Marah commented on the current state of the supply chain executive and the technology that is driving their ascendance:

“Today, the head of supply chain, at most major manufacturers and retailers, is influencing margins, time to market and customer retention, with strategic capabilities that matter to investors. This should come as no surprise. Technology has broken the link between location and communication and allowed manufacturing, assembly, promotion and service to draw on players around the world and around the clock.”

Supply chain execs are becoming their companies’ “rock stars” with an ever expanding span of control and an increasing impact on business results. When it comes to dealing with stress and complexity, I am consistently impressed by the “coping skills” of these supply chain leaders who have to deal with issues of increasingly volatile, global supply chains, as well as perennial requests to take cost out, do more with less and better leverage capital. Now with the recession, they face heightened pressures. Yet at this year’s [DBMA Supply Chain Leaders in Action](#) business forum I heard success story after success story from companies who are using the current conditions as an opportunity to excel.

Here’s what these supply chain leaders do to cope:

1. **They collaborate, focusing on their customer – and their customer’s customer** – to prioritize where resources should be applied and ensure smooth communications.
2. **They use “fit to purpose” methodologies and technologies** like Lean Six Sigma and BPM to streamline their supply chain processes.
3. **They make decisions based on data in context** using technologies like SharePoint and adaptive case management to organize information, deal with exceptions, break bottlenecks and balance risks along the supply chain.

4. **They practice continuous process improvement** using modeling and analytic tools to gain better visibility along their end-to-end supply chain and simulation to understand the impact of changes.

Throughout it all, they are relentlessly focused on winning. And they use process and technology thoughtfully to accomplish their goals – both as an integral part of their strategy and a critical element of their tactical programs to deliver improved performance results for their companies.

So what do you think about the power of positive pessimism; how might extreme coping skills; help your company outperform? I'd be interested in hearing examples of how you've used life lessons at work and for those creative souls out there, how about sharing a "positive pessimism" of your own to inspire us!

Original Article with Community Comments

<http://www.endusersharepoint.com/2010/08/16/the-power-of-positive-pessimism/>



Deborah Miller
[Global 360 Inc.](#)

Deborah Miller is Director of Market Development for [Global 360](#). Her work focuses on industry strategies for business process improvement. You can read more of Deb's writings at <http://DebsG360.wordpress.com/> and at [@DebsG360](#) on Twitter.

