

5 Important Questions to Ask Potential BPM Vendors

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GETTING STARTED WITH YOUR BPM INITIATIVE

There are many elements to consider when embarking on a Business Process Management (BPM) initiative. These considerations include things like creating a BPM Steering Committee and establishing current state baselines for ongoing metrics, as well as Change Management planning and communications. The most successful BPM initiatives are those that are strategically aligned with targeted business goals, and fully supported by organizational leadership. But, while there are many components to consider when launching a BPM Program, ultimately you will need to decide on a technology vendor to provide a BPM solution that meets your needs, and delivers on the promise of your strategic goals.

Choosing the right vendor is crucial to the success of your overall BPM Program. Even a well-constructed BPM strategy and launch plan can be undermined by selecting the wrong BPM product vendor. For example, if the resulting solution delivers a sub-par user experience, adoption rates will likely suffer, putting any potential process improvements or efficiency gains at risk. The system must be intuitive and easy to use for all the target audiences – customers, process owners, case workers, fulfillment teams, etc. – or they will find a way to work around it. Similarly, the system itself must be stable and provide consistent performance, or users will lose confidence in it.

While usability and stability are critically important, it's also important to minimize the extent of customization. Any true custom development required to implement your BPM solution will complicate future product upgrades. So, choosing a product that's predicated on low-code configuration over customization is always an advantage.

And, selecting the wrong BPM vendor could also leave your organization in a position where you're stuck with poor product support. You want to be certain you'll have access to the support your business needs and expects once the solution goes live. So, you definitely want to find a BPM vendor who you feel offers the best combination of product capabilities and a true sense of partnership when it comes to ongoing support and maintenance.

Once you are finally ready to choose your solution, consider asking prospective BPM vendors five key questions to during the evaluation process.

QUESTION #1: "HOW LONG WILL IT TAKE TO IMPLEMENT MY SOLUTION?"

There are literally dozens of technology vendors selling BPM products, platforms, and/or solutions, and in many cases, several that could potentially deliver the end solution that's perfectly suited to your organization. So all things being equal, one crucial question to ask prospective vendors is how much time it will take to go from contract-signing to launch. Obviously, the more quickly the solution can be rolled out, the lower the total cost of implementation and the faster you can begin seeing some ROI. Of course, you should be wary of any estimates coming back that sound too quick, but generally speaking, you'll want to favor those vendors that say they can deliver results faster.

"Through 2017, insufficient BPM maturity will prevent 80% of organizations from reaching the desired business outcomes from their digital business strategies."

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Given the same set of functional requirements, different vendors will frequently provide different estimates on delivery time. Each vendor will have their own implementation methodology and delivery process, which can impact estimates. But, they also know their own products inside and out, and presumably have a history of working on similar implementations (also see Question #5 below). So, barring any exceptional constraints around resource availability or budget, their estimates typically reflect the relative level of effort required to configure or build within their specific product suite.

Products that feature low-code configuration capabilities in lieu of custom code also speed up delivery times. They expand the pool of potential process builders, and minimize training time needed to get up to speed. That way, you can have more people (vendor consultants and/or internal resources) working proficiently within the platform more quickly than you could with other products.

Savvy vendors will also likely propose an iterative implementation approach, where possible, in order to generate some quick wins. They'll look to identify obvious pain points that can be addressed immediately, as those incremental process improvements can serve as a proof of concept for the overall BPM program. So rather than trying to tackle the full desired end-state for all affected business processes across the organization at once, these vendors will look to isolate those areas that present the greatest opportunity for noticeable performance improvements in the short-term, and launch those first. From there, with credibility and momentum stemming from initial success, you'll be in a good position to move on to other processes in subsequent project phases.

It may take some creativity to get a fair apples-to-apples comparison, but in the long run, your business will benefit by selecting a BPM product vendor who can deliver quickly – preferably in terms of weeks or months, instead of years.

QUESTION #2: "DOES THE BPM PRODUCT/PLATFORM HAVE THE CRITICAL CAPABILITIES I NEED?"

Every company will have its own unique business processes, and the individual processes being digitalized via a given BPM Program will vary in scope and complexity. As such, specific purchase criteria will differ from one organization to another. However, there are some key, standard features that most buyers would expect from any BPM product in today's market:

- **Role-Base Access to Processes and Data** – Your BPM solution will need to cater to different audiences. For a particular business process, that might entail multiple user groups – customers, management, operations, finance, or even external providers. As such, your BPM solution must provide role-based access to the precise data and work-stream activities unique to each audience, whether that's a group of people, or even an individual. So, the product you select should be able to authenticate each user logging in against a system of record (AD, LDAP, external database, etc.) in order to grant permissions accordingly.
- **Low-Code Configuration** – As noted above, the best BPM products emphasize low-code configuration over custom development. This expands the pool of potential people who can build on the platform, speeds up implementation, simplifies maintenance, and facilitates easier product upgrades in the future.

- **Integration Capabilities** – A key function of an effective BPM solution is to integrate external systems and data sources related to a given process into a centralized interface where process workers and end-users can collaborate on work activities. Some level of integration capability would be expected for any BPM product. But the best ones make integration easy to configure and offer a variety of integration methods, along with a wide range of pre-built integration kits available for common COTS business applications.
- **Reporting and Analytics Capabilities** – Visibility into consolidated data is an important element of any BPM solution to support informed decision-making by process workers. Reporting dashboards and console-style views of relevant data within a web portal interface are common approaches for presenting real-time business process data and activity statuses to applicable users. Your specific needs around reporting and analytics will vary depending on the nature of your business and relative process maturity, but it's fair to assume that some level of this will be required.
- **Modern User Interface** – Users have come to expect consumer web site quality design and usability in nearly any application or system they interact with these days. BPM solutions are no different. They must provide a positive overall user experience in order to drive adoption.
- **Responsive Design for Mobility** – In order to support a variety of work styles in today's business world, BPM solutions must be accessible to users on mobile devices. Ideally, the solution should incorporate the concept of responsive design, where a single interface would size dynamically as needed to accommodate a range of devices without sacrificing functionality. That way, you can design the solution once, and allow your users to interact with their work processes as needed via desktop, laptop, smart phone or tablet.

The system must be intuitive and easy to use for all the target audiences – customers, process owners, case workers, fulfillment teams, etc. – or they will find a way to work around it.

QUESTION #3: "WILL THE SOLUTION PROVIDE A SUITABLE USER EXPERIENCE FOR MY TARGET AUDIENCE?"

As noted earlier, creating a positive user experience (UX) within your BPM solution is a critical component of any successful digital transformation effort. A poor user experience will hinder adoption, which then undermines the value of any process improvements being implemented. On the other hand, delivering a great user experience can help increase adoption rates and drive overall usage, maximizing the value you can realize from your BPM investment.

Again, users will bring certain usability expectations to the table when interacting with any application or system. BPM solutions built on web portal-based platforms make it easier to meet or exceed those user expectations. They allow you to deploy solutions with a modern UI on par with consumer web sites which are visually appealing and intuitive to navigate. And again, if the core product embraces the concept of responsive design, solutions built on it should be accessible from virtually any device. Users expect a similar experience when working on a tablet or smart phone as they do when working from their desktop computer.

Usability is not only a factor for end users – it's important for process builders and system administrators, too. The more intuitive the tools are for building or updating processes, the less training time is needed for those tasked with maintaining the solution moving forward. Similarly, the more intuitive the UI design is on the front-end, the less training time you'll need for end-users to spur wide scale adoption. So you'll want to focus your evaluation on BPM products that support a rich and satisfying UX in order to maximize adoption and value derived from process improvements.

QUESTION #4: "WILL THE SOLUTION BE EASY TO CHANGE OR EXPAND OVER TIME?"

Every organization has their unique business processes, and whatever BPM solution deployed needs to handle them. But inevitably, processes will evolve over time. In fact, continuous process improvement is a cornerstone of any comprehensive BPM Program, so you should expect some level of ongoing change with any solution you implement. As such, you will want to avoid building anything static or custom-coded to fit a particular current-state process. Custom-coding will always increase the complexity and costs associated with future process changes or product upgrades. Instead, you should focus on BPM products that are easy to implement and readily support future changes or expansion.

Once again, we come back to the importance of low-code configuration capabilities over custom development. Not only will low-code configuration help you launch your BPM solution faster, it will also enable you to make changes more easily moving forward. Solutions built on BPM platforms offering configurable components like web forms, reporting dashboards, UI branding, and workflows will always be easier to update or expand over time than those that have been custom-coded. Ideally, those configurable components should also allow you to build functionality that is modular and re-usable, wherever possible. That way, you can configure something like a dynamic web form or an approval sub-process once, share it across multiple processes, and still manage it centrally in one location.

And the more intuitive the platform's low-code configuration tools are, the more likely process build and maintenance responsibilities can be delegated out to a wider group of citizen developers with minimal training expenditures.

QUESTION #5: "HOW MUCH EXPERIENCE DO YOU HAVE WITH SIMILAR CUSTOMER IMPLEMENTATIONS?"

While there may be a number of products or platforms that could potentially deliver the right BPM solution for your business, the vendor company you choose to work with is also an important consideration too. You'll want to find a vendor who not only has a great product, but who also has a solid track record of successful client implementations. Look for case studies, whitepapers, or press releases that sound similar to your planned implementation when evaluating potential vendors. And, if you're able, try to setup reference calls with current clients. Vendors that have a long list of similar client successes and a high rate of client retention (renewals) should be on your short list.

Beyond a history of previous client successes, you'll also want to find a vendor who's good to work with – ideally, someone who's demonstrated a true sense of partnership with their customers on previous projects. Ultimately, you'll want to work with a vendor who's genuinely invested in the success of your implementation project, not just looking to sign a new license deal. You may even run across some BPM vendors who prefer to outsource the actual implementation consulting services to 3rd party partners. While this model isn't necessarily a deal-breaker, you'll probably want to dig a little deeper into the details if a vendor proposes this model to understand why. Do they not have resources available in-house to do the work because their backlog is too big, or because the product is too complicated to work with? In either of those cases, your delivery timeframe could definitely be impacted.

Look for BPM vendors who can demonstrate a depth of experience in collaborating with their clients on all aspects of a BPM implementation project, including requirements definition, solution design, iterative development, testing, launch, and ongoing support. And focus in on those

"In order to adapt to changing business needs more quickly, there is an even greater focus on making the technologies easier to use so that the citizen developer (business users and business analysts) can author solutions with minimal involvement from IT."

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vendors who have a solid reputation as good partners – those who'll work with you to tackle the inevitable challenges that arise along the way. Most importantly, select a BPM vendor who you feel comfortable forging a relationship with, and who instills confidence in your project team.

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¹Gartner, *Kick-Start Your Initial BPM Projects With a Strong Skills Foundation to Deliver Results*, August 2015

²Gartner, *Magic Quadrant for Intelligent Business Process Management Suites*, August 2016