

Use Extended BPM and Case Management to Integrate Islands of Processes, Content, and Data

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Business Processes and Information Create the Foundation for Today's Business Activities

For decades, business processes and information (both data and content) – along with human communications – have formed the backbone of all business activities: serving customers, creating products, supporting employees, making decisions, complying with regulations, closing the books, and so forth.¹ Over the years, the technologies supporting core business activities have radically changed how work gets done; equally, the tools themselves have morphed, expanded, and been eclipsed as new technologies debut. The complexity of activities a modern business is required to master keeps expanding, too, as businesses globalize, partner across the supply chain, build flexible workforces, work hard to delight customers, and are increasingly regulated.

In today's organization, two core components of work keep the “engines” going:

- **Business processes:** The essential processing activities for one or more business functions are either done manually or semi-manually, or executed by software that automates most of the work. This software may be custom developed by the organization's IT shop or acquired from a small software vendor focusing on a particular market segment. More typically, it is a large enterprise suite. The latter category handles large, complex processes such as enterprise resource planning (ERP), supply chain management (SCM), customer relationship management (CRM), product lifecycle management (PLM), and human resource management (HRM), or could be a high-value, more unique process that is automated using case management, a specific type of business process management (BPM) software.



■ **Information management:** If business process automation moves work from one place, state, or phase to another, then *information is the fuel that drives that process*. At its most basic, corporate data is stored in a relational database, managed through data warehousing and master data management, kept consistent by data quality, and abstracted and symbolized by analytics. Companies have spent untold sums on managing, improving, expanding, and updating the data stack. Unstructured content, on the other hand, has been much harder and messier to govern and automate. Most organizations now use managed repositories for mission-critical content, stored in enterprise content management (ECM) systems. But many firms still struggle to get their arms around business documents, plus the exponentially growing stores of video and audio, and the vast amount of unstructured information created every day by all their employees, customers, partners, and regulatory bodies.

Comparatively speaking, *the automation of business processes has moved at a much faster pace than information management, and can be considered the more mature of the two components of work (with the exception of unautomated case management processes and other more complex processes which are still often manual or semi-automated)*. That's because companies absolutely require a way to execute their core business processes, while they can hobble along, however inefficiently, with content scattered throughout the organization. That situation, however, is changing fast, given that so much content is born digital

(i.e., was never in paper form) and that executing business activities for customers, partners, employees, and other stakeholders means firms are expected to have all the information, not just the basic data surrounding the transaction.

Extended ECM, BPM and Case Management Tackle the Hard Work

Extended enterprise content management (xECM) is an important trend that's changing how work gets done.² Historically, companies have created many islands of content separated by departments (marketing, finance, sales, etc.) or by information type (business documents, engineering drawings, video, medical images, etc.). But with rising expectations that all information should be accessible all the time, not having access to critical content when working in core business systems like ERP, CRM, SCM, PLM, or HRM is akin to walking around the business with blinders on. Employees using business applications can't see – or worse, don't even know about – important information that could drastically influence their decision-making, efficiency, and even effectiveness.

Extended ECM addresses that problem by adding a world of rich, unstructured information to business applications – bolstering, informing, updating, and enhancing how workers handle critical customer interactions, financial decisions, and operational processes. Digital Clarity Group defines xECM as follows:

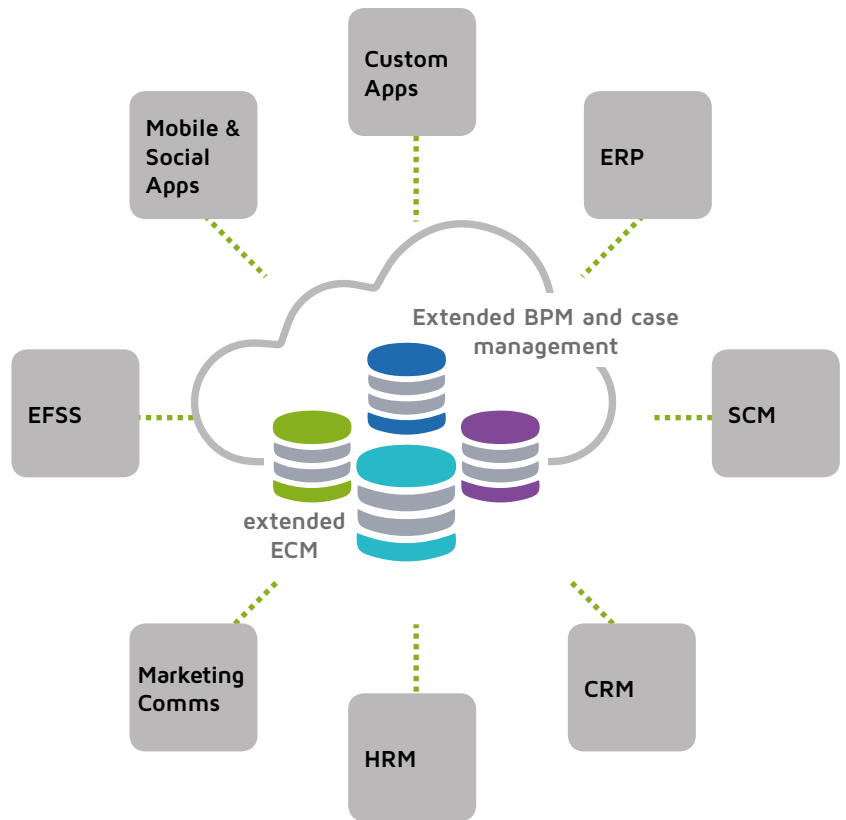



“The unification of digital content and business applications by integrating ECM and enterprise business suites – such as ERP, CRM, SCM, HRM, and PLM – *and/or business processes automated through business process management (BPM) software, case management (a type of BPM software), and custom developed business applications.* The integration may be prepackaged and delivered out of the box by the ECM vendor, the BPM software vendor, or the business applications vendor. Alternatively, it may be developed in-house by the IT organization (or its service provider) using the vendor’s universal connectors.”

Note the italicized phrase in the above definition: *and/or business processes automated through business process management (BPM) software and case management (a type of BPM software).*³ We recently added that phrase to the definition because the xECM concept and technology is now beginning to expand into BPM software products (see Figure 1). This emerging extended BPM (xBPM) development allows organizations to integrate their BPM software and case management processes with:

1. ECM and other content stores;⁴
2. enterprise business suites;
3. vertical and departmental packaged business applications;
4. custom, in-house business applications;
5. analytics;
6. collaboration and social tools.

Figure 1
Extended ECM Embraces Extended BPM Software






Importantly, xBPM is becoming an essential part of case management, and when these two software products are deployed together it allows organizations to tackle some of the hardest, most difficult, unpredictable, and problematic processes to automate. xBPM does this by integrating content systems, analytics, collaboration, and social tools *out of the box* with adaptive case management software in support of highly dynamic processes. Furthermore, the integration isn't just simple integration providing a basic link between the case management system and other information sources. Instead, the xBPM integration between case management and content solutions should support these core principles for linking content and business processes:

1. **Contextual** – the user can access content within the context of his or her standard work environment, *and* within the context of the instance of work being addressed; the user is no longer required to mentally provide the context for the content or to learn another system with a different U/I.
2. **Relevant** – content metadata is shared or easily accessed within the business process and the instance of work.
3. **Alignment** – content solutions can be mapped to usage and fit to purpose. For example, easy to use, simple to deploy EFSS systems can be integrated with case management to support individuals, workgroups, and departments, while mission-critical content with high business value and/or risk can be integrated with the case management system while being more closely controlled.

Adaptive and Dynamic Are Two Core Concepts for Business Processes and Information

Why are *dynamic* and *adaptive* such important features for BPM software that a new category of BPM – case management – was created, and an integration tool was built to support it? The answer lies in the types and criticality of business processes that case management tackles:

- The hallmark of *dynamic* processes is that the path to the completion of the process either could potentially, or does constantly, change. Sometimes the change is so variable that each instance of work can take a different path, depending on what happens during each step of the process. In some situations, case management-enabled processes are somewhat predictable but subject to change, while in other cases it's almost impossible to know the route the work will take until it is done. This dynamic characteristic makes it impossible to design a traditional BPM process flow in advance from start to finish. Instead, case management and the xBPM integration with content stores gives knowledge workers considerably more latitude (based on their knowledge of the work) to change the flow of work than clerical workers had in the past.
- By being *adaptive*, case management products are capable of supporting non-linear, recursive work and flexible processes; with xBPM the case management system can provide contextual integration with content, analytics, social, and collaboration tools. Plus, if the adaptive case management product also supports entity-modeling tools, this approach



for modeling dynamic processes vastly simplifies the reuse and integration of information, accelerates the development time, and lowers the overall cost by a considerable magnitude.

Examples of processes well suited for case management solutions include: concierge services for high-net-worth clients, contract management, contractor workforce allocation, dispute resolution, fraud detection, healthcare management, incident reporting, investigations, loan origination, problem resolution, protective services, security and risk assessments, underwriting, and wealth management.⁵ In reality, most organizations have many case management processes and these are only a few representative examples.

Extended BPM provides a number of benefits to the organization in the following ways:

- 1. Integrating BPM and/or case management with ECM** – making it faster and easier to add rich contextualized content to business processes by integrating BPM-powered processes using standard connectors with ECM systems.
- 2. Addressing manual work with BPM and/or case management and then integrating them with enterprise suites** – automating more of the currently unaddressed, manual work in support of core business processes by integrating BPM-powered processes out of the box with the enterprise suites prevalent in most organizations.
- 3. Automating manual work with BPM and/or case management and then integrating with custom applications** – integrating

BPM-powered processes more quickly (using standard connectors) with custom developed applications, providing more contextual, streamlined work environments.

- 4. Maintaining xBPM connectors to ECM or business applications over time** – ensuring that the integration connectors from software vendors are guaranteed when the software on either end of the xBPM integration is updated to a new version.
- 5. Automating manual work with BPM and/or case management and integrating with content and packaged applications over time as needed** – continuing to reduce the amount of manual work still so persistent in the workplace, despite enterprise suites and custom applications, by tackling unautomated or semi-automated processes and automating as needed with information stores or other processes.

A use-case example of xBPM can be seen by extending the reach of CRM business processes. For example, a request for proposal (RFP) may be received by the business and processed in its sales automation software. However, RFPs are also largely textual, graphical and spreadsheet-based, so the RFP may be stored and managed in a controlled repository within the ECM system. But perhaps reviewing the RFP and creating a winning proposal is not a straightforward process and can't be supported solely in the sales automation software. To offset that limitation, the organization may also have an adaptive, dynamic case management system that is powered by BPM software to handle the complex proposal process. Through xBPM, the case management proposal process can be integrated contextually using

Figure 2
Today's Business Lacks Integration Between Content and Processes, While Manual Work Abounds

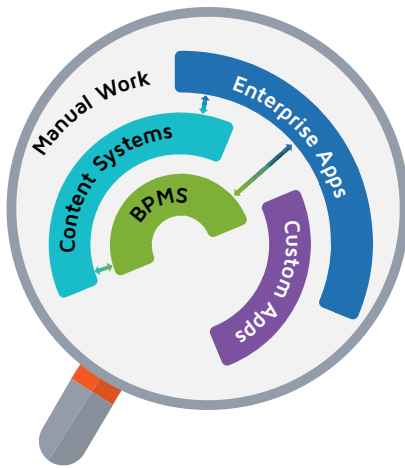
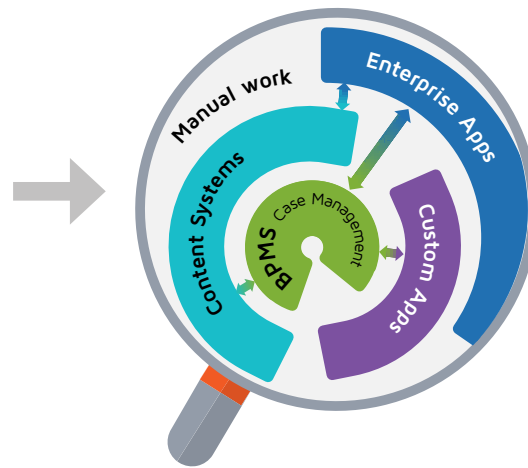


Figure 3
Integration Will Increase Over Time While Manual Work Will Decrease



standard connectors with the sales automation software and the ECM system. Once the case is completed, the work could move automatically back to the sales automation system and the ECM system would be updated.

Use xBPM to Meet Rising Employee, Customer, and Partner Expectations

The exciting news about xBPM and xECM is that both capabilities (and the intersection of the two) help organizations continue their never-ending advance on unautomated or semi-automated work. This is a serious but often invisible problem in organizations. It's invisible because people get so accustomed to the way things work that they forget or overlook the fact that it could be, and should be, so much better. That is the challenge process professionals and information management specialists face: shining a light on the

unautomated, poorly automated, and unintegrated systems that workers use day in/day out.

If we were to closely examine an organization's work, including its processes and information, the results would be eye-opening. (See Figures 2 and 3.)

While organizations have systems to help workers get their jobs done, the information systems and business applications often live in separate domains, forcing the workers to complete the integration, both manually and mentally. Plus, the amount of manual work remains persistently high. That may always be the case in a constantly changing world because businesses are dynamic, technology is always advancing, and expectations continue to rise. But it's important for organizations to meet the rising tide of expectations and technology advances by automating manual and unintegrated work, and to integrate systems that workers mentally integrate on a frequent basis. That is both the challenge and promise of xBPM, particularly when used with xECM and case management.



Endnotes

- 1 Human communications are as important as business processes and information when it comes to getting work done. However, the interaction among people is outside the scope of this brief, which focuses on business processes and information.
- 2 For a discussion of how xECM can integrate ECM solutions with CRM, see <http://www.digitalclaritygroup.com/delight-customers-extended-ecm/>
- 3 For an in-depth analysis of BPM software and use cases, see <http://www.digitalclaritygroup.com/tackle-complex-processes-bpm/>
- 4 EFSS, or electronic file synch and share, is another type of content software that is more workgroup and departmentally focused than more rigorous ECM solutions, although EFSS is often deployed throughout the organization.
- 5 For more on insights on case management see <http://www.aiim.org/What-is-Case-Management#>

About Digital Clarity Group



Digital Clarity Group is a research-based advisory firm focused on the content, technologies, and practices that drive world-class customer experience. Global organizations depend on our insight, reports, and consulting services to help them turn digital disruption into digital advantage. As analysts, we cover the customer experience management (CEM) footprint - those organizational capabilities and competencies that impact the experience delivered to customers and prospects. In our view, the CEM footprint overlays content management, marketing automation, e-commerce, social media management, collaboration, customer relationship management, localization, and search. As consultants, we believe that education and advice leading to successful CEM is only possible by actively engaging with all participants in the CEM solutions ecosystem. In keeping with this philosophy, we work with enterprise adopters of CEM solutions, technology vendors that develop and market CEM systems and tools, and service providers who implement solutions, including systems integrators and digital agencies.

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