Business Process Management
A Rigorous Approach

Martyn Ould
Venice Consulting Ltd
Programme

- Challenge some received wisdom
- Outline a rigorous approach to building process foundations for a process-based organisation
- Give a simple example of its use
- Outline a major case study
We need sound foundations

- What are the foundations of our business process management?
- On what foundations will we build our ‘process-based’ organisation?
- We need a sound and robust view of what processes we have
- I’m going to call that sound foundation the ‘process architecture’
Process architecture

- A picture that tells us
  - what processes we have
  - what dynamic relationships they have
- It will underpin absolutely everything else we do
  - discovery
  - analysis
  - design
  - validation
  - integration
  - implementation
  - control
  - improvement
The wrong architecture will make us do the wrong things
The curse of the five-bite kebab

An invitation to
- fragmentation of the process
- organisational silos
- inappropriate measurements and targets
- unnecessary hand-offs
Characterising our business

- Being in a particular business means there are certain things we must deal with
- ... let’s call them *Units of Work*, eg
  - a customer order
  - a clinical trial
  - a supplier
  - a product
  - a plant failure
  - a customer
  - a patient visit
Units of work imply processes

✦ A process to handle each:
  ➢ ‘Handle a customer order’
  ➢ ‘Handle a clinical trial’
  ➢ ‘Handle a supplier’
  ➢ ‘Handle a product’
  ➢ ‘Handle a plant failure’

✦ The case process
✦ Instantiated whenever the demand is generated
Key properties of a case process

- It is by definition end-to-end
- It is a natural for appropriate measurement
- Inside it is where we make design decisions about
  - organisational structure
  - technology
  - culture
  - etc
Units of work multiply

- A drug compound generates (needs) several clinical trials
  - During the life of the compound, clinical trials are started for it
- A clinical trial generates (recruits) many patients
- A plant failure can generate (require) one or more maintenance tasks
- A patient visit can generate (require) tests
- A customer can generate sales opportunities
Let’s draw a picture

The business of being a library is a dynamic affair involving three sorts of monkey/rabbit
And another

The business of doing clinical trials is a dynamic affair
The rabbit warren needs management

- What about the scheduling, resourcing, and prioritising of all those competing cases of a unit of work?
- That’s the case management process
- Examples:
  - ‘Manage the flow of products’
  - ‘Manage the flow of orders’
  - ‘Manage the flow of deliveries’
  - ‘Manage the flow of production batches’
The process architecture can be derived directly from the UOW Diagram
Here’s another

This *Riva* process architecture captures the true dynamics, not just a glib ‘chain’ or hierarchy
A little more work on the library’s process architecture ...
The process trinity

Unit of Work (UOW)

- **Case process**: handles a single case of the UOW through its lifetime
- **Case management process**: manages the continuing flow of cases of the UOW, monitoring over the medium term, scheduling, and prioritising case process instances
- **Case strategy process**: observes long-term performance and trends, makes predictions, and determines the strategy for the case and case processes in the future
Starting from scratch:
The NHS Innovations Landscape

- A virtual organisation
- Involving many players
  - End-users of innovation
  - The NHS and its departments
  - Venture capitalists
  - Manufacturers
  - Regulatory agencies
- Currently a confusing environment for all, with no vision of ‘process’
The requirement

- A coherent model describing the key processes for, and organisational roles in, taking a product from concept, or statement of need, through to adoption in the health service
  - Describe the work of the Landscape as a set of business processes independent of organisations
  - Provide a framework for discussion about how best to provide services on the Landscape
  - Use a common language to describe the way that organisations participate in the Landscape
UOW Diagram
Process architecture
Perceived benefits

- Drafted in a day and has survived a year’s scrutiny and use, almost untouched
- Emphasises end-to-end processes (eg **Handle a Product**)
- Mapping existing activity onto the Landscape showed
  - gaps (processes not/partially provided)
  - opportunities for improved coordination
  - inefficiencies in existing provision
- Provides a welcome shared language across the virtual organisation
For a rigorous approach think ‘networks’

- Your organisation is a *network* of processes
- As it runs,
  - there is a flux of case processes
  - under the control of a set of case management processes
  - all under the strategic eye of a set of case strategy processes

- Forget the myth of chains and hierarchies
For the full story of Riva, read

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by Martyn Ould
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web www.veniceconsulting.co.uk
email mao@veniceconsulting.co.uk
phone +44 (0)1225 7623 822
voip +44 (0)870 931 3379
skype veniceconsulting