

The Journey to BPM and Workflow

Part 1: Process Pat
Begins the Search for a
Better Solution



Meet Pat...

Process Pat is a Director of IT at a medium-sized healthcare company. He's a seasoned veteran with years of experience with different types of applications and process solutions, but he's looking for something that will bring big, meaningful change to the way his company works.

So far, Pat has encountered a lot of options, but none are comprehensive enough to address his needs. He has seen workflow applications that aren't adaptable to process change, project management tools that can't scale, and products that are re-tooled versions of spreadsheets and don't facilitate collaboration.

Pat wants something that will knock colleagues and managers' socks off and show significant improvement.

We invite you to follow Pat as he begins scoping and planning to implement a BPM and workflow solution that fits his company's needs. In Part I, Pat initiates his project and seeks approval from internal stakeholders.



Here's Pat:

Title: Director of IT

Company: Healthcare device manufacturer. 3200 employees. Headquartered in the Pacific Northwest.

Education: BA, Economics. Graduate-level online courses in IT and systems analysis.

Business concerns: Increasing operational efficiency. Contributing to profit improvement.

Outside interests: Cycling, gardening, fantasy football.

Last book read: *Pre-Suasion*, by Robert Cialdini

Favorite quote: "Success consists of going from failure to failure without loss of enthusiasm." Winston Churchill

Business is going really well at our company. We have had seven consecutive quarters of significant growth, dramatic improvements in our margins, we are hiring good people, and morale is great. In the midst of this, the last thing anyone wants to do is kill momentum. Which is why, if I don't nail the project I'm planning, I could easily become the guy who ruined all the fun.

The truth is, I think we have the potential to do things more effectively. Even with all this success, I see processes that would benefit from improvement—in areas like how we manage tasks, how we communicate, and how we make decisions. I see this from the perspective of an employee whose work depends on business processes and workflows.

Before this project can move forward, I need approval to do it, and do it the way I want. The first step is to get my CIO and other executives to recognize that this is not the time to sit on our hands. I need them to see that with action, we can prepare our company for a future where we can replicate the things we are doing well right now—and even do them more efficiently.

In order to get their approval and for me to then move forward, I have to explain what we need to do in their terms. I will inform and persuade our execs by focusing on outcomes. I want them to see the critical improvements our company will realize by implementing this kind of thinking and assuage any concerns they have. My approach will be a mixture of salesmanship and exploration.

Learn more:

[Why Choose BPM?](#)

All organizations want to increase efficiency and operate at an optimal level. Business process management (BPM), smart forms and workflow automation software help to create a business environment that is highly responsive, accountable, and compliant. BPM software provides the tools required to automate all your business processes and improve your results.



“We wanted a product that would enable us to minimize delays and make tracking more visible. With a fully automated system, all processes would follow predefined paths that would make the system more effective as well.”

Learn how [NEC Labs imported](#) is using BPM and workflow to store and access 15,000 documents and 20,000 records, and captured 17 years of research to provide a better experience for its employees and shareholders.

SUCCESS

To get approval and start generating some interest, I'll explain the project in terms of our goals:

ROI: I'm providing an analysis that shows cost savings from deploying a robust BPM solution. It includes estimates of reductions in the number of hours employees spend on time-consuming tasks, and the impact of faster and more collaborative decision-making.

Empowerment: Executives love it when people can do more. A BPM solution, especially one that does not require IT to build and manage processes, will empower our employees to improve their workload by creating more efficient ways to accomplish tasks.

Risk mitigation: There are always concerns around allowing access to our company and customer data, so I have already built in tight security for our network and our environment. To ensure that our BPM system will be secure, I have developed specific guidelines for usage and access, and, with the solution I'm proposing, I will be able to monitor usage trends and behavior.

Automation benefits: Demonstrating what a BPM solution can do to automate certain tasks, reduce red tape and increase efficiencies will definitely get the attention of our execs.

Approval doesn't just mean the word "Yes". For our workflow and BPM implementation to be successful, I need resounding enthusiasm and support. As I'm working on approvals, I'll also be looking to develop internal champions.

Innovation. Execution. Customer-focused.

The roots of BP Logix are in the software industry however we are involved in our communities, work in philanthropic and non-profit organizations, help build schools in third world countries and write books and ebooks. We are grateful to be a part of an organization that thrives on challenge and rewards creativity and innovation.

Talk to Bechtel, Leo Burnett USA, Memphis Light, Gas and Water, Rite Aid, Starwood Hotels and Resorts, or Vulcan Materials Company. They can tell you how we have helped them.

We hope that knowing more about us and what we do – and what we do for our customers – will be the reason to check us out further. And we invite you to start that conversation.



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