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The Need for BPM Standardization

Anyone involved in any aspect of a process change effort understands the need for a consistent use of basic terms to describe process work. Traditions like Lean, Six Sigma, Business Process Reengineering, Information Technology, and Business Process Management often use the same terms in slightly different ways.

These different usages confuse business managers, frustrate practitioners and make any discussions regarding the nature and benefits of BPM difficult to describe and communicate. A common, basic vocabulary and agreement on the major tasks, techniques and roles involved in process work would establish a foundation for the growth of the overall BPM market and would benefit all practitioners of BPM.

The need for such agreement is underlined by the growth of BPM programs in the academic community. Many universities are establishing business process curricula and courses, and some have established advanced degrees in BPM. If we cannot define the field in a more-or-less common way and build research programs to refine and extend common practices, the field will fragment and will gradually dissipate.

Several groups have already launched standardization efforts. Some have established formal specifications (e.g. the OMG's BPMN Specification) and some have defined practices and techniques (e.g. the AQC's Black Belt practices documentation and the ABPMP's BPM CBOK documentation) that are used for specific certification programs. None, however, has succeeded in representing a comprehensive overview of process work or a systematic catalog of the tasks and techniques that a skilled process practitioner ought to understand. Thus, without intending to, each has contributed to the balkanization of the process field.

The time has come to create an open, comprehensive process body of knowledge. BPTrends has joined with the BPM Group at Queensland University of Technology (QUT), the International Institute of Business Analysts (IIBA), Kemsley Design, and the Object Management Group (OMG), to establish the Process Knowledge Initiative. (www.processknowledge.org)

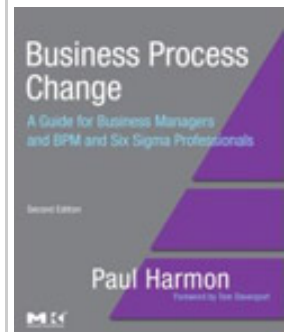
The Process Knowledge Initiative invites any individual or organization interested in process change and process improvement including process management, process measurement, process redesign, process automation and human change to join in a non-profit, open, common effort to define a core set of terms, tasks and techniques for the process field.



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The Process Knowledge Initiative will focus on accomplishing the following:

1. Establish a core group of experts to draft initial documents defining a metamodel, knowledge areas, tasks, techniques, and roles for process work. The core group will be broadly representative of the various perspectives on process and will strive to define terms and practices that all groups interested in process can support. This effort will result in a series of documents, produced over the course of a year.
2. As each draft is completed, the results will be published on a website and everyone interested in process will be invited to comment on the document. Using a Delphi technique, inputs will be considered and drafts will be modified and resubmitted for further comment. In this way, each of the draft documents will be polished to capture the broadest possible consensus.
3. A non-profit group will be established to publish and maintain the process body of knowledge. Specialized groups working in the process field and universities offering process programs will be urged to adopt the terms defined by the Process Knowledge Initiative and the resulting process body of knowledge will be released under an open source license, free-of-charge.

A Tentative Metamodel and an Example of Task/Technique Definition

Table 1 illustrates the current draft of the metamodel, which we have adopted from work done by the IIBA. In essence, this model suggests that a field of knowledge can be broken down in a hierarchical manner. We begin with a description of a set of knowledge areas. Then, we define tasks that are used in one or more of the knowledge areas. For each task, we define techniques and identify where various techniques perform a similar function. Concepts and roles can also be associated with one or more tasks. If knowledge areas, tasks, concepts, roles, and techniques are kept independent of each other, then it is easy to add new tasks, concepts, roles, or techniques without requiring a major reorganization of the knowledge.

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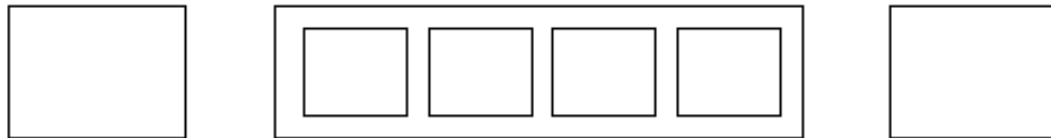
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Table 1. Elements of a Body of Knowledge

A Limited Number of Knowledge Areas to Define the Space of Business Process Management (Some sub-areas as if it clarifies things.)



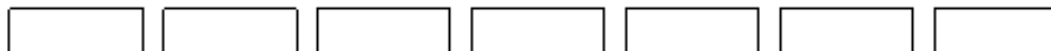
E.g. Business Process Architecture,
Business Process Redesign,
Continuous Improvement

A Large Number of Tasks (Inputs/Transforms/Outputs) that can be used in more than one Knowledge Areas. Concepts (models, vocabulary) are often associated with specific tasks.

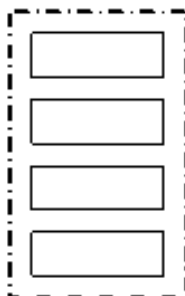


E.g. Analysis of As-Is Process
Design of To-Be Process
Design of a BPMS Application
Management of BPM Center of Excellence

A Catalog of Techniques that describe how something can be done and that can be used in more than one Task



E.g. SIPOC -Technique for modeling process flow,
SCOR – Business Process Framework for Charactering a Supply Chain
SCAMPER – Technique for creative problem analysis

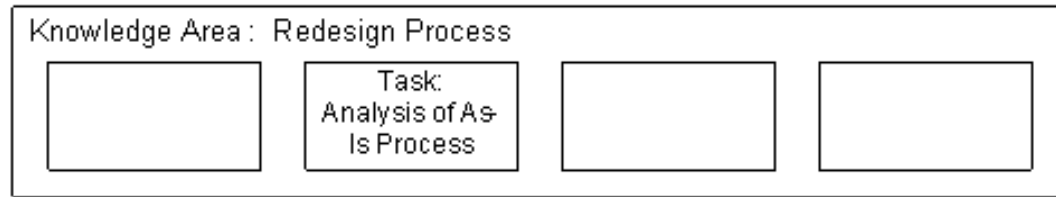


Individual (Specific) Techniques, in the catalog are grouped into sections (Generic Group of Techniques) to indicate where similar techniques might be substituted for each other

E.g. Generic Group: Model Process Flow
Specific Techniques: SIPOC, BPMN, IDEF, UML Activity Diagrams
Generic Group: Business Process Framework
Specific Techniques: SCOR, eTOM, VRM, ITIL

Example 1

As an example, imagine that the Process Knowledge Initiative settles on **Redesign Process** as a Knowledge Area and decides that it contains several tasks, including one called **Analysis of As-Is Process**.



We might also conclude that the generic technique **Model Process Flow** is used in the **Analysis of As-Is Process** task.

This generic technique, **Model Process Flow**, might include a number of **Specific Techniques** including:

Generic Technique: **Model Process Flow**

- **Specific Techniques:**

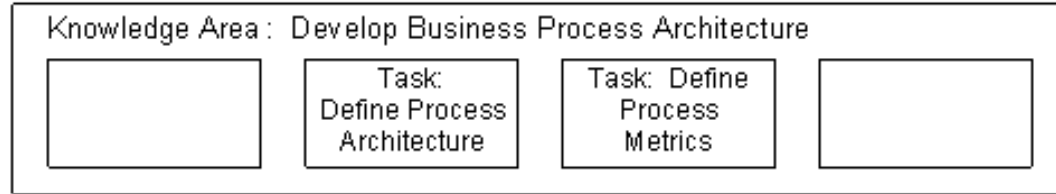
- SIPOC <Six Sigma>
- BPMN <OMG Standard>
- IDEF <US Commerce Dept Standard>
- UML Activity Diagrams <OMG Standard>
- Rummler-Brache <de facto standard defined in Improving Performance>
- LOVEM <IBM notation>
- EPC (Event-Driven Process Chains) <ARIS notation>

One major advantage of having a solid ontology is that we can generate categories and define them later. Thus, we can suggest that **Model Process Flow** is a generic technique used in the **Analysis of As-Is Process** task (among others) and then ask for examples of specific techniques. Some individuals may suggest techniques and others may undertake definitions. In some cases we may list a technique but not go on to define it at that time. This is very much the way Wikipedia is developed, with different individuals contributing to areas about which they are knowledgeable. It means we can develop a draft quickly and then fill in details over the course of time. It also assures that individuals can edit the document without having to get into details. A group or individual, for example, might only focus on the nature of tasks and not get into techniques, while another group or individual may only be concerned with a specific technique or set of techniques.

We would aim at a very high level definition of each technique, but external organizations might offer detailed explanations.

Example 2

Here is a second example. In this case, imagine that the Process Knowledge Initiative settled on **Develop Business Process Architecture** as a Knowledge Area and decided that it contained several tasks, including one called **Define Process Architecture** and another called **Define Process Metrics**.



We might also conclude that the generic technique **Use Business Framework** is used in both the **Define Process Architecture** task and the **Define Process Metrics** task.

This generic technique, **Use Business Framework**, might include a number of **Specific Techniques** including:

Generic Technique: **Use Business Framework**

- **Specific Techniques:**
 - SCOR <Supply Chain Council>
 - VRM <Value Chain Group>
 - eTOM <TeleManagement Forum>
 - ITIL <ITIL Organization>
 - APQC Petroleum Framework <APQC>

In this case, information about the frameworks might include pointers to the organizations that provide detailed information about the specific techniques.


These examples only skim the surface of the effort, but they suggest how a well-structured metamodel can structure the effort and make it possible to define and refine tasks and techniques more or less independent of each other, making a large effort more practical.

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What Happens Next

At the moment, the Process Knowledge Initiative is recruiting individuals and groups to take part in the effort. It is also seeking funding to support the overall research and management of the Initiative. If you are interested in learning more about the Process Knowledge Initiative please visit the Process Knowledge Initiative website – www.processknowledge.org – and indicate your interest. Within a month, you will be notified regarding the structure, process and schedule for the Process Knowledge Initiative.

I know from experience that reaching broad based agreement on industry definitions can be tedious and time consuming. I also know, first hand, about the diverse meanings people attach



to basic terms and techniques and the confusion that results. I believe that everyone in the process field is at a disadvantage because business managers don't have a clear understanding of the nature and value of process work. I also believe that an effort to develop a broad consensus about the nature and scope of process work will provide benefits for all of us involved in process work. I encourage you to visit www.processknowledge.org and let us know how you would like to contribute to this important effort.

Paul Harmon

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