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## The Coming Year

The US economic crisis that began in 2008 has spread to other countries with differing consequences in each country or region. Some areas, like Australia, have been relatively unaffected, while others, like Europe, have experienced considerable hardship. The US seems to be slowly recovering and most expect that 2012 will be a little better than 2011, which was certainly better than 2010.

In terms of the growth of the Business Process markets, broadly speaking, more companies are emphasizing a process-orientation than ever before, and most are looking to process methodologies and technologies to improve performance and decrease costs.

There has been a transition from Six Sigma, which was more dominant a few years ago, to Lean and to BPM. The emphasis on Lean is a result of a belief that Lean provides a good approach to the shorter term goal of increasing efficiency. The emphasis on BPM is based on the belief that processes should be centrally managed and that various approaches to process change should be better coordinated and managed to increase and sustain improved performance. In some cases, BPM is understood as an IT initiative, but increasingly, BPM is understood as a business management initiative that coordinates and manages, not only BPR, Lean and Six Sigma, but also Business Rules, ERP and IT process initiatives.

NEW  
Business  
Process  
Modeling  
2011

A BPTRENDS  
SURVEY REPORT

#### Business Process Change

A Guide for Business Managers  
and BPM and Six Sigma Professionals

Second Edition

Paul Harmon

Foreword by Six Sigma

MCC

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BUSINESS PROCESS TRENDS

Many organizations have laid off large numbers of their workforce in order to reduce costs. Individuals that approached process broadly and stressed improving organizational performance seemed to have had little trouble finding new positions, while those who approached process from a more limited perspective and who thought of themselves as specialists in Six Sigma, or in Business Rules, or BPMS, seemed to have had more difficulty relocating. Individuals who are more flexible, who emphasize a more comprehensive approach and are focused on results rather than specific techniques, are increasingly in demand.

In the 2005 BPTrends Market Survey less than 50% of the respondents indicated that their organizations were doing process modeling. In our 2011 Survey, over 75% of the respondents said their organizations were doing process modeling. That's a significant increase. At the same time, well over 75% of the respondents to the 2011 Survey said their organizations had a significant interest in BPMN. We have gone from a point in time where there were lots of different process flow modeling notations to a point in time where companies are increasingly standardizing on tools and techniques, that enable them to better share process models throughout the organization.

In a similar way, a few years ago, our Surveys tended to attract a group who identified themselves, rather vaguely, as process practitioners. They still exist, but today we see significant numbers of practitioners who define themselves as Business Analysts or Business Architects. Moreover, more Lean and Six Sigma practitioners are beginning to embrace BPM and more Business Rules practitioners are also actively involved in working on process initiatives. In essence, a broader process community is slowly but surely forming – a community that is

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placing less emphasis on specific techniques and more on using whatever techniques work best to improve organizational performance.

Those who equate BPM with BPMS software tools still exist, as well, but there is a growing realization that BPM is much more comprehensive than the BPMS software market.

Consolidation of the BPMS market continued in 2011, with at least five major acquisitions:

- 12-11 Kofax (Scanner Technology) buys Singularity (BPMS)
- 12-11 Progress Software (Software Tools) buys Corticon (Rules)
- 8-11 TIBCO (BPMS) buys Nimbus (BP Modeling)
- 7-11 OpenText (Documentation/BPMS) buys Global 360 (BPM Suite)
- 2-11 OpenText (Documentation) buys Metastorm (Workflow)

At the same time, a variety of new vendors announced the availability of BPMS products. The concept of a BPMS software tool or platform continues to become more complex and the most elaborate tools offered by vendors like IBM and SoftwareAG include a variety of different technologies that the vendors are still struggling to integrate.

One of the key findings in our 2011 BPTrends Process Modeling Survey is that, in most organizations, the group responsible for process analysis and design is different from the group responsible for process automation. This suggests a need for different sorts of software tools – some that support business users focused on the business aspects of processes and others that support software developers who are focused on automating specific elements

of the new process designs. This represents a change in the market and is one of the primary factors driving the entry of new vendors providing tools that are easier to use, while the major software vendors, who are acquiring a variety of tools, are more focused on more complex tools that are aimed at software developers.

A few years ago, the process related conferences were more focused on BPM and BPMS. The major conferences on BPM, in 2011, were conferences like the IRMUK BPM London conference in June that combined BPM and Enterprise Architecture, and the Building Business Capability Conference in Ft. Lauderdale that combined Business Analysis, Business Rules and Business Process Change.

At the same time, BPM as an academic discipline continues to grow, providing a research base and a source of trained professionals that was lacking a few years ago. This year's International BPM Conference, which is the major meeting place for academic BPM researchers, will be in Europe (Tallinn, Estonia in September) and it is scheduled for Beijing, China in 2013, indicating that BPM has become an international concern.

In 2005 when BPTrends did our first BPM Market Survey, less than 25% of our respondents were outside of North America and Europe. In our 2011 BPM Modeling Survey, over 33% of our respondents were from outside North America and Europe, with a growing number of respondents from Australia, South America and the Middle East. By 2013, we fully expect to see that percentage increase and to include significant responses from India and China. Organizations everywhere, including for profits, as well as non-profits

and government agencies, are focusing on BPM as a way of organizing their process improvement efforts, and they know that global competition requires that those improvements are implemented and managed vertically and horizontally across the organization and that they are completed as quickly as possible.

We are not suggesting that 2012 is going to see a dramatic increase in business process work. In some countries and in some industries, that will happen, but the world economy is still too fragile for us to realistically forecast a great year. It will, however, be a good year. Organizations will show more interest and practitioners will develop more comprehensive approaches that will be widely accepted. Those engaged in BPM will enjoy unprecedented successes, the momentum will grow and more people from a variety of different perspectives will increasingly work together to help organizations use processes as a more efficient and effective way to organize their work.

Till next time,

Paul Harmon and Celia Wolf

**BPTrends LinkedIn Discussion Group**

We created a BPTrends Discussion Group on LinkedIn to allow our members, readers and friends to freely exchange ideas on a wide variety of BPM related topics. We encourage you to initiate a new discussion on this publication, or on other BPM related topics of interest to you, or to contribute to existing discussions. Go to LinkedIn and join the [BPTrends Discussion Group](#).

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