

A Broader Look at BPM

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Successful integration of digital and paper documents into BPM strategies can deliver big benefits to a company and its customers.

Today's business environment is filled with documents. Whether in electronic form or on paper, documents such as bank loan applications, government forms, customer service requests, business reports, and volumes of other materials are vital to our work. Surprisingly, business process management (BPM) discussions rarely touch on the role of documents in everyday processes – overlooking the potential benefits of improved document creation, security, and processing.

In many ways, this oversight is understandable. Gaining control over documents can appear daunting. A global financial company, for instance, might have thousands of different customer service forms tailored to the language and regulatory requirements of each country in which the firm operates. Manufacturers also have rooms full of forms for everything from product engineering changes to customer orders; plus, they have to manage and archive hundreds of thousands of product-design documents.

Currency of transactions

The reality is that paper and electronic documents are a common currency, driving many business activities. From the simple signing of a digital credit card receipt to the complex exchange of legal documents between partnering companies, documents are so prevalent inside and outside of work that we often fail to notice them. The prevalence of documents underscores the importance of addressing them as part of a BPM strategy: With so many document-dependent processes, the business benefits of streamlining document workflows can be tremendous.

To accomplish this, companies need a better understanding of how documents are used throughout their business processes. When considering documents within the context of BPM, it is helpful to look at some basic ways documents support business workflows, including customer interactions, regulatory compliance, and product development.

Getting closer to customers

As consumers and corporate buyers have more purchasing options, businesses are finding it increasingly difficult to attract new customers and retain existing ones. Buyers, of course, are swayed by costs on purchases and the ease of accessing and receiving items. It is well known that the way companies manage contact with customers – from sales order to delivery, and subsequent support services – can make the ultimate difference between winning or losing business. Unfortunately, the role of documents in aiding or hindering these transactions is often ignored.

Companies have generally automated some or all backend processes for handling customer orders. And while this is critical, it is only part of what is needed. As consumers become more comfortable with electronic systems and automation, their patience for completing, copying, and delivering paper forms decreases. This trend is already evident in traditionally paper-intensive areas such as financial services where organizations and individuals are realizing the benefits of intelligent digital forms over paper.

The challenge for many businesses is in transitioning to digital processes that enable secure, reliable electronic capture and processing of customer data, and also support delivering materials in a consistent, compelling manner. A company cannot afford to sacrifice its corporate image and brand by providing customers with access to poor-quality digital forms and other business documents. Additional considerations are the need to control document content and appearance to adhere to legal regulations and the ability to support automated workflows for routing materials and data once they are submitted.

By addressing these concerns, businesses can enable individuals to complete and submit product order forms, loan qualification documents, and other materials electronically. Customers can enjoy the efficiencies that companies have spent years establishing internally. This convenience also makes it easier for customers to receive and order products, and has a dramatic impact on business operations. For instance, customers become more integrated into everyday processes, accelerating order processing and reducing the time employees spend rekeying data, routing forms, and managing other costly, potentially error-prone administrative activities.

Ending the government paper chase

Government agencies have long focused on reducing the amount of paper they handle internally and require from constituents. In fact, the U.S. Government Paperwork Elimination Act of 1998 set out to do exactly that. Yet a primary challenge faced by government agencies is that one of their core activities is to capture and process information, whether in the form of IRS tax documents, FDA compliance forms, or FAA safety reports.

To address this challenge, agencies are automating many front-end processes that involve internal collaboration among staff or direct outreach to constituents. For instance, pharmaceutical companies now have the option of electronically submitting lengthy new drug applications (NDAs) that include millions of pages of analysis on clinical trials and drug development. The results have been impressive. Pharmaceutical company and FDA staff can find information in complex reports in seconds instead of spending hours or even days searching through filing cabinets. At the same time, NDA approvals can be accelerated and administrative costs can drop substantially.

To automate paper-dependent processes, many government agencies are converting paper forms into interactive, electronic forms. The new digital forms often look like older forms on paper, making it easier for people to use them and enabling agencies to comply with requirements for document appearance. But the similarities end there. Unlike their paper counterparts, the electronic forms can contain built-in intelligence that secures materials against unauthorized access, supports digital signatures, routes documents across project teams, and handles other tasks. With the enhanced digital forms, government agencies can reduce reliance on paper, while still capturing the information they need.

Evolution of BPM

Another area in which improved document handling directly affects BPM is in product development at manufacturing companies. Frequently, no matter how automated a company's processes are, many workflows ultimately revert to paper-based processes. Engineers, key development partners, and others often share volumes of design-related documents on paper, even if all data and materials are available electronically. The reason is simple: Paper is viewed by many people as a common denominator, eliminating problems that occur when recipients have different computing platforms and applications, or are unfamiliar with how proprietary software programs operate.

Fortunately, intelligent document technologies can help address the problem. In the case of

product manufacturers, platform- and application-independent file formats enable dispersed project teams to securely share and collaborate on materials, regardless of the application used to create the original information. This means that team members can exchange materials with co-workers and partners worldwide in seconds and avoid waiting days for materials to arrive by courier or having to deal with difficult-to-read faxes.

Things to consider

When integrating digital documents into business processes, there are several things to look for, including:

- Universal document format. Managing multiple document formats is an obstacle to streamlined digital processes. Intelligent documents should be platform- and application-independent, enabling organizations to convert and combine multiple document types into a single, universal format.
- Dynamic documents. Not only should users be able to enter information into digital forms, but the documents should also be integrated with backend systems, supporting secure capture and receipt of data from enterprise systems.
- Flexible documents. Digital document processes need to adapt to the specific requirements of each project and to the ways in which people work, online or offline. Some situations will require intelligent forms that can capture and deliver XML data to and from backend systems, while other applications will need to support completing forms on paper. With paper, the ability to automatically capture data from forms using barcode or other technologies is essential.
- Secure documents. Digital document processes should enhance document security. Digital signatures, encryption, password protection, and other security features are integral to incorporating electronic documents into BPM.
- Control built into documents. Intelligence in documents supports structured or ad hoc workflows, depending on an organization's needs. In some cases, built-in document controls need to manage routing for review and approval or provide resolution strategies if problems arise during processes. Additional controls include limiting how documents can be used and shared, and tracking all activities as documents move through workflows.

Addressing the role of documents is important to implementing effective BPM strategies. Through documents, individuals collaborate with one another and also interact with enterprise systems. In many ways, dealing with document processes is the next logical step toward a more comprehensive approach to BPM. Where the focus was once on internal computing systems, BPM is evolving to include the front-end tools that people use daily to get their jobs done, anywhere at anytime.

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