



## BPM: A Global View

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## What Makes BPM Human Centric?

In my last column I discussed the importance of people in processes managed by BPM, and the need for human-centric capabilities to increase the use of the BPM. I discussed the high-level requirements of human-centric BPM for facilitating change, handling exceptions, supporting collaboration and providing usability. In response to that column, I received the follow-up question concerning the specific requirements of human-centric BPM and why they are difficult to deliver.

A discussion of the full scope of human-centric capabilities in all the components that make up a BPM system is a very long topic that cannot possibly be covered in one column. Therefore, I will use the BPM client, or “task in-box”, as an example to help illustrate the complexities of providing human-centric capabilities.

E-mail clients such as Microsoft Outlook have become ubiquitous. Many people spend a large part of their working hours in Outlook. It is where we go to find out what we have to do, send instructions, respond to questions and share information. For BPM to become a ubiquitous platform, the BPM client has to become more capable than Outlook. The BPM client is the software that people who participate in business processes use to receive their process-related tasks and perform them. While e-mail clients such as Outlook provide capabilities for organizing, viewing and replying to e-mails, a BPM client needs to do much more as I will explain below.

Process-centric organizations deploy a large number of automated processes using BPM systems. The employees of such organizations will become frequent users of the BPM client in order to perform many different tasks. When it comes to performing tasks, these users will “live” inside the BPM client far more than Outlook because the BPM client will become the primary tool they use to get their work done. These users will have the following needs as a minimum:

- i. **Search for Tasks:** The users need the ability to search for a specific task or a set of tasks they want to perform. In many cases the search will be repetitive, so it is useful to have the ability to save the search queries for future use.
- ii. **Organize Tasks:** If there are a large number of tasks, users need the ability to organize tasks in a logical fashion so they are readily accessible. Depending on the user’s preferences, tasks may be organized based on different criteria or combinations of criteria such as priority, type, due dates, receipt dates, complexity, etc. Frequently the user may want to organize tasks into categories by using terminology that is specific to a business process or to the company’s line of business. Banks may use Account Number and Account Type, manufacturing companies may use Part Number and Bin Number, insurance companies may use Claim Number and Claim Type, etc. This means that the BPM client has to have the ability to change its task list terminology to match the business terminology of the organization.

- iii. **Share Tasks:** In many cases, groups or teams want to share some or all their tasks with each other. A manager may want to share some of his or her tasks with subordinates, or members of a team may want to share tasks with one another. Sharing can be on a read-only basis, or with full ability to view the tasks and also to perform them. If many users are sharing a task list, the BPM client has to provide the means of check-out and check-in. One user can check-out a task in order to perform it. Other users must be aware of who has taken ownership of the task. If the user decides that for some reason he cannot complete it, he needs the ability to check-in the task so it is available for others to work on.
- iv. **Complete Tasks:** Users need the ability to complete tasks and submit them to the BPM server so the process can move on to the next step. In some cases, the user may want to automatically go the next task in their queue. In other cases, the user may want to go back to the task list and select the next task she wishes to perform. There are also other scenarios where a user may wish to re-submit a task that has previously been completed. Typically, this happens when, after completing a task, the user receives new information that will impact the process, and it needs to be updated with the new information.
- v. **Return Tasks:** In many cases, a user receives a task but is unable to complete it because of incomplete or incorrect information. The user needs the ability to easily “return” the task so that it goes back to the previous step in the process or to some other logical step.
- vi. **Assign Tasks:** It is common for users to assign some or all of their tasks to other users. Tasks are assigned to others either because the user wants to delegate the task to someone else, or because the user is unable to perform the task himself because of a vacation or some other absence. In the case of a planned absence, the user may wish to assign tasks between specific time periods. A single task or a group of tasks may be assigned to others. Furthermore, for larger organizations, the user may wish to use the software to find the most appropriate person to assign the tasks to. Finally, if users are given the ability to assign tasks, they also need the ability to “take back” the tasks they have assigned to others.
- vii. **Confer Tasks:** Users often want to discuss how to complete a task with a peer, supervisor or someone else before completing it. The purpose is not to assign the task to someone else but simply to solicit his or her opinion. The task has to be forwarded to another person with some comments attached. The recipient has to be able to add some comments and perhaps even edit some of the information representing the task. However, the conferee can not submit the task. Instead, it has to be returned to the original user who is the owner so that he or she can complete it.
- viii. **Check Task Status:** A user must be able to check the status of where each incident of a process is.
- ix. **Disown Tasks:** A user needs to have the ability to “disown” a task if it was assigned to them in error. Disowning a task must not cause a process to return to the previous step. Instead, the process owner needs to be notified so that she can assign the task to someone else who will own the task.
- x. **Change Roles:** Users often change roles. When roles are changed, a BPM solution must provide an easy means of re-routing tasks to appropriate people given the new roles and responsibilities.

In this brief overview, I have listed only ten capabilities of a robust BPM client. In reality there are many more. However, even these ten illustrate that the BPM client has to provide many human-

centric capabilities that go well beyond the capabilities of an e-mail client such as Outlook. Indeed since BPM deals with specific tasks and is not generic like e-mail, the requirements for a BPM client are a superset of the requirements of an e-mail client such as Outlook. People work in complex ways. If BPM is about increasing the productivity of the way people work, then it is imperative for a BPM client to support the complex ways in which people work. Without such capabilities, the BPM client is likely to become an inhibitor rather than a facilitator. These capabilities are essential for the wider adoption of BPM. They are examples of the types of capabilities and requirements that make BPM challenging.

BPM is fundamentally about business and therefore the role of business owners, business analysts, and end users is central for the success of BPM. At the same time BPM is a technology that relies heavily on integrations, databases, SOA and other key repositories of corporate knowledge that are owned and managed by IT, which also makes the role of IT central to the success of BPM. This creates another important challenge for BPM which is to provide an effective platform for IT and business people to collaborate and deploy winning BPM solutions. This is also a people-centric challenge. The BPM client is an important, but by no means the only, component of a BPM solution that demands human-centric capabilities.