

Working with Business Processes

Discovery, Mapping, Redesign and Requirements



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25-26 November 2010, London

Fee £1095 + VAT
Group Booking & Series
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Overview

Business processes matter, because business processes are how value is delivered. Understanding how to work with business processes is now a core skill for business analysts, process and application architects, functional area managers, and even corporate executives. But too often, material on the topic either floats around in generalities and familiar case studies, or descends rapidly into technical details and incomprehensible models. This workshop is different – in a practical way, it shows how to discover and scope a business process, clarify its context, model its workflow with progressive detail, assess it, design a new process, and make the transition to other types of requirements. Everything is backed up with real-world examples, and clear, repeatable guidelines.

Learning Objectives

- Identify a “true” business process, and specify its boundaries and goals
- Describe the key factors that differentiate process and functional approaches
- Employ a variety of techniques to keep stakeholders involved, and promote “process orientation”
- Establish the scope, issues, and goals for a business process
- Model process workflow at progressive levels of detail using Swimlane Diagrams
- Stop process modelling at the appropriate point, and move on to other techniques or phases
- Conduct a structured assessment of a business process
- Design a new process while avoiding common (and serious!) pitfalls
- Smoothly make the transition to the specification of IT and other types of requirements

Seminar & Workshop Outline

Business processes – what they are, and how to discover them

- Variations on what is meant by “process”
- Guidelines for well-formed processes and business processes
- Impacts of incorrectly identifying business processes
- Example – using this method in identifying “true” business processes
- Summary – six rules for business processes

Working with business processes – issues, impacts, and methods

- Two perspectives: functional (skills and resources) and business process (results and value)
- Reconciling the two – philosophies and methods for helping functions and processes get along
- Impact of business processes for application and process architects
- Introduction to process modeling techniques – decomposition, flow, and other techniques
- Progressive detail – working through the scope, concept, and specification levels
- Understanding the six enablers of a business process
- Methodology overview – a three-phase approach to completing a process-oriented project

Discovering your enterprise's business processes

- Depicting “process areas” with an “overall process map” or “process landscape”
- Using “off the shelf” frameworks
- Contrasting top-down and bottom-up methods for process discovery
- When to use one-on-one interviews, when to use group sessions
- Beginning your analysis by clarifying terminology – a structured approach
- Process patterns and inter-process relationships that will emerge
- Case study: hands-on practice with process discovery, team work and group debrief

Framing the process – scope, issues, and goals

- Separating the “what” from the “who and how”
- Defining “what” (the essence) and “who and how” (the current implementation)
- Case study – defining process scope
- Initial assessment of the “as-is” process and goal-setting for the “to-be” process
- Clarifying strategic direction – the process “differentiator”
- Case study – process assessment, goals, and differentiator

Workflow models – techniques for modeling process flow

- Essentials of workflow models (“swimlane diagrams”)
- The three most common errors in workflow modeling, and how to create useful models
- Three questions to drive your initial swimlane diagram with a practical example

- Guidelines for actors – who or what can or cannot be an actor on a swimlane diagram
- Special cases – depicting systems or machines, holding areas, and other processes as actors
- Guidelines for steps – naming, multi-actor, and sequential, parallel, and collaborative steps
- Guidelines for flow – what that arrow really means, common errors, parallel vs. exclusive flows
- Additional symbols, keeping it simple, transition to BPMN

Managing detail – controlling the detail of your models, knowing when to stop

- Real-life example – why detail must be managed
- Controlling detail – three levels of workflow model with examples and guidelines
- When to stop – how to know when you've crossed the line and aren't modeling workflow anymore
- Making the transition to use cases, procedures, and task specifications

Techniques for facilitating an as-is workflow modeling session

- The basics – participants, resources, and tools
- Facilitated session ground rules – specifics for “process” sessions
- How to actually finish a flow diagram – one process, case, scenario, and path at a time
- A reminder – the three questions to drive your initial “handoff level” workflow model
- The three questions to drive the initial diagram, and five more questions to validate and extend it
- Case study – hands on practice with developing the workflow model

Designing or redesigning the to-be process

- Clarifying redesign options – starting with an as-is vs. a whole new process
- Three common redesign problems, three techniques to avoid them
- Final assessment of the as-is process – a framework for assessment and its role in redesign
- Conducting the final assessment of the as-is process
- A decision point – five options for going forward
- Establishing principles for a new process - Moore's matrix, differentiator, primary characteristics
- Seven patterns and themes in redesigned processes
- Characterizing the to-be process – generating creative improvements
- Factors to make the new process sustainable
- Uncovering unanticipated consequences – an enabler-based assessment of characteristics
- The “process requirements document”
- Creating the new workflow – turning the to-be characteristics into a workflow model
- Designing an all-new process – from identifying the essence through to creating a flow model
- Refining and testing the emerging workflow model
- Preparing for implementation

Audience

Business Analysts who are responsible for requirements specification or are involved in business process re-design or improvement

Business and Process Architects responsible for establishing frameworks and direction for enterprise processes

Business Managers and Content Experts who will participate in process re-design or process-oriented application development efforts.

Prerequisites:

There are no prerequisites in this course. However, Business Analysts who expect to do extensive process analysis will find that some understanding of information systems concepts may be helpful in establishing context.

Business Analysis Series

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22-24 November 2010, London

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25-26 November 2010, London

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Presenter



Alec Sharp has managed his consulting and education business,

Clariteq Systems Consulting Ltd., for close to 30 years. Serving clients from Ireland to India, and Washington to Wellington, Alec's expertise includes facilitation, strategy development, data management, business analysis, and business process improvement. He conducts workshops and conference presentations on these topics globally, consistently receiving “excellent” ratings. Alec is the author of the recently-released second edition of “Workflow Modeling” (Artech House, 2008) which is widely used as a university text and is a best-seller in the field.

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