



## BPM Everywhere

**How to make a BPMS more accessible for everyone while gaining impressive results**

### **ABSTRACT**

This White Paper is a useful primer about the importance of Business Process Management (BPM) today. It begins by focusing on the practical benefits that BPM brings to day-to-day business activity and then expands this view to consider what impact BPM has already made around the world. The Paper continues with a summary about the advantages of PNMSOFT's SEQUENCE BPM and a brief description of its main components. Finally, a sample case study demonstrates what BPM with PNMSOFT can achieve.



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## ➔ RETURN ON INVESTMENT

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### Speeding your 'time-to-value'

The 'time-to-value' concept has become a keynote of most new technologies: how long before the bright technological ideas that you employ are translated into solid business, bankable results? The central appeal of Business Process Management (BPM) is its ability to standardise your operational processes that span applications, departments and businesses. You'll want to know:

- How efficiently is a job being done?
- Can it be performed faster, with less room for error?
- Can parts of it be automated?
- How do you monitor if everything is going to plan?
- How can you prioritise around where the money is?

Clearly, the more positive your answers are, the more likely you are to cut the time between your initial investment and eventual return. In other words: 'time-to-value'.

### ***Your expectations from BPMS***

Gartner and Forrester predict that the market for Business Process Management Suites (BPMS) will reach \$6 billion by 2011. That's one of the fastest growing software sectors in the world. What attracts so many people to BPMS?

- Greater business efficiency – less paper and shorter work cycles
- Boost in productivity – opening bottlenecks and better collaboration between people and systems
- Closer management control – identifying risks, avoiding risks and taking the right decision at the right time, undertaking impact analysis and prototyping
- Better collaboration between human roles and systems
- Automated compliance and risk management

### ***Greater business efficiency***

Any new enterprise faces considerable efforts and expenses while it establishes itself in new offices: training staff, responding to customers, setting up administrative and reporting systems, and much more. BPMS allows you to develop and test workflow processes and, when they succeed, deploy them rapidly throughout your organization.

### ➔ **SEQUENCE Example**

*Tnuva is a large Israeli food corporation with dairies, factories and distribution points spread throughout the country. SEQUENCE helped the Dairy Division to rapidly identify production problems, speed handling time for Quality Assurance issues and enhance customer service processes.*

### ***Improved productivity***

Ensuring that your staff are better informed is a sure step towards improving work throughput and performance. BPMS deals with business processes that cover all your activities – enabling you to move more smoothly through each cycle until the final result is achieved. This boosts your staff’s productivity and your revenue growth.

#### **→ SEQUENCE Example**

***Amdocs** is a world leader in customer management solutions, active in 50 countries and employing 16,000 people. They used PNMsoft’s BPMS tools to create complex processes in just 20% of the time that was previously required (12 days instead of 60 days). This automation allowed Amdocs to speed their time to market and increase their revenue flow.*

### ***Closer management control***

Company files are full of examples of wasted opportunities in retaining customers and growing customers by providing a superior and attentive level of service. Major resources in BPMS are focused on developing and optimizing operational processes that will result in a positive customer experience. Happy customers are loyal customers, and loyal customers are happy to spend more.

#### **→ SEQUENCE Example**

***SwiftTrade** is the first and largest Direct Access Electronic Trading Centre in Canada with offices across Canada, Europe, Asia and the Americas. In its global share trading activities, SwiftTrade is subject to many demanding compliance requirements. The company’s President, Peter Beck, said about Sequence: “To have our Compliance Supervision processes automated has lifted an unbelievable burden from the organization.”*

### ***Automated compliance management***

Meeting the compliance standards of many international institutions is a daunting prospect, drawing precious work time away from revenue-generating activities. BPMS is designed to collect and assemble the ‘building blocks’ of such processes, thereby helping your staff to meet compliance requirements more rapidly.

#### **→ SEQUENCE Example**

***Home Group** is the UK’s largest provider of social housing solutions for Local Regional Government. PNMsoft’s SEQUENCE helped the company to tighten control and improve its business agility among its thousands of employees, customers and suppliers. It also synchronized Home Group’s various businesses.*

## ➔ OVERVIEW OF BPM MARKET

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### Achieving rapid business results by using BPMS

#### **“When you set up new offices, how much time will it take until they start making money for you?”**

That was the dilemma facing SwiftTrade, Canada’s largest Direct Access Electronic Trading Center. Coordinating multiple processes that dealt with financial, logistics, administration and customer servicing matters, SwiftTrade needed a smart solution that would manage time and decisions better. A BPM system was the obvious answer.

*“There’s no way we could have executed our explosive growth, going from 27 offices to 65 in one year, without using SEQUENCE BPM to manage the processes associated with setting up locations all over the world...”***Peter Beck**, SwiftTrade President

#### ***The key is to understand your processes and automate them***

Process is pervasive. The question is how efficiently you manage it and whether you can avoid covering the same ground twice. The concept behind Business Process Management Systems (BPMS) in general - and SEQUENCE in particular - is to remove the wasteful gaps between person-to-person and person-to-system communications. Ideally, you’ll ask for something to be done and as it happens, you automatically receive a timely report of the action. This is the only way that SwiftTrade could have added 38 offices and made them operational within one year! BPMS streamlines your work, bringing you greater efficiency and higher productivity.

It is particularly appropriate for:

- Handling the increased demands to do “more with less”
- Getting the most out of your existing business software (ERP, CRM etc)
- Rapidly changing business models that must stay flexible
- Seeking a competitive edge
- Meeting regulatory compliance
- Undertaking process improvement projects
- Handling business applications (services, manufacturing, retail, distribution)
- Applying horizontal solutions (HR, Finance, Engineering etc)

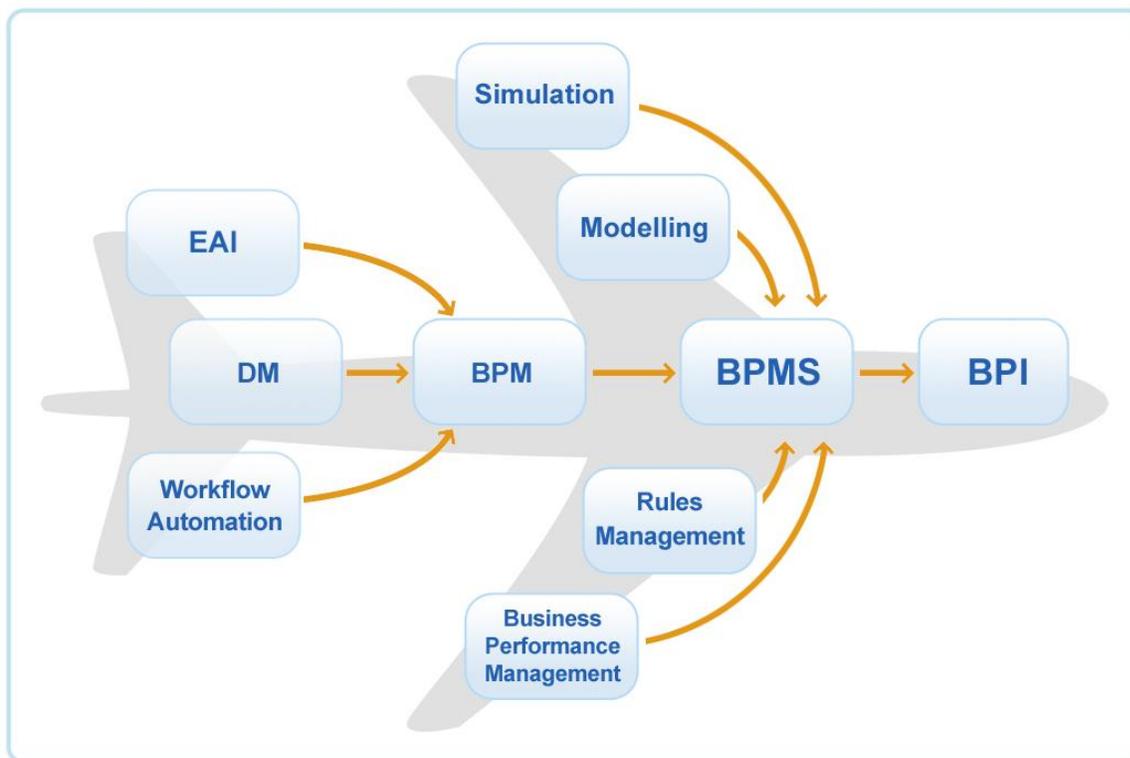
#### ***BPM enters the mainstream***

BPMS has matured. This market is considered to be the one of the fastest-growing software market segment and is estimated to grow at a compound annual rate of more than 24% between 2006 and 2011. This is four times as fast as other BPM-enabling technologies.

According to Gartner's latest report, total software revenues of BPM products reached nearly \$1.7 billion by 2006 and exhibited the characteristics of a mainstream market – with stable vendors, vendor consolidation and rapid user adoption. They project a market size of \$5.1B by 2011, a figure that is in line with other estimates (\$5.5B from IDC and \$6.3B from Forrester).

Moreover, according to Gartner, CIOs have rated Business Process Improvement as the #1 priority for the third year running. BPM Systems are the technology drivers for efficient Business Process Improvement (BPI), by taking process-centric service tasks and turning them into improved business results.

### ***Catching the BPI Jet***



A good way to understand how far BPM has traveled is by using the metaphor of an aircraft. Each component has contributed towards the situation we have today:

Engine – The power of BPM comes from the separate solutions prior to 2000 - Enterprise Application Integration (**EAI**), Document Management (**DM**) and **Workflow Automation** (WA) – which were used by businesses to seek greater efficiency.

Mid-plane 1 - 'Business Process Management' (**BPM**), first defined by Gartner in 2000, was the blending of EAI, DM and WA into one coherent software package. It became the central platform for business efficiency improvement.

Wings – The addition of more specific software, such as **work process simulation** and **modeling, rules management** and **performance management**, gave BPM the 'wings' to really take off as an effective business solution.

Mid-plane 2 – From 2006 onwards, BPM with these enhancements 'built-in' was given a new name – Business Process Management Suite (**BPMS**). This became an even stronger platform for improving competitiveness. By 2008, BPMS has become one of the leading software packages used by businesses – with a preference for 'no coding' features.

Cockpit – All prior technologies are now being consolidated into Business Process Improvement (**BPI**), one of the strongest drivers in business today. BPI is the systematic approach that helps organizations to optimize their underlying processes as they strive towards getting more efficient results with fewer resources.

### ***Building business agility***

BPM is designed to bridge the gaps between systems, people and geographies in your business operations. Rather than ask "*How much are these gaps costing me?*", you progress to: "*How fast can I close my gaps?*" BPM allows you to do more with what you already own, increase your business agility and respond faster to market dynamics.

In a '2008 State of the BPM Market' report, respondents were asked to name the areas where they expected to see the greatest ROI from BPM systems. Their responses were:

- Automating or accelerating highly manual processes = 26%
- Increasing visibility into processes = 21%
- Improving operational excellence = 20%

### ***Looking into the crystal ball***

Industry experts believe that the future of BPM is tied closely to Service-Oriented Architecture (SOA) and that the two will be working closer together over time. Large IT organizations have invested greatly in SOA in recent years with the purpose of building simpler, more flexible and more reusable business services on top of separate siloed and redundant IT systems. In parallel, BPM is showing its effectiveness in improving responsiveness to market changes. It is this agility that helps to justify and fund SOA investments. In return, SOA enables BPM to scale up quickly and efficiently.

In its May 2007 issue, AMR Research states that "***BPM allows companies to create unique and differentiating business processes on top of the same software that many of their competitors use***".

## → SEQUENCE - PRODUCT OVERVIEW

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### SEQUENCE makes BPM easy and intuitive

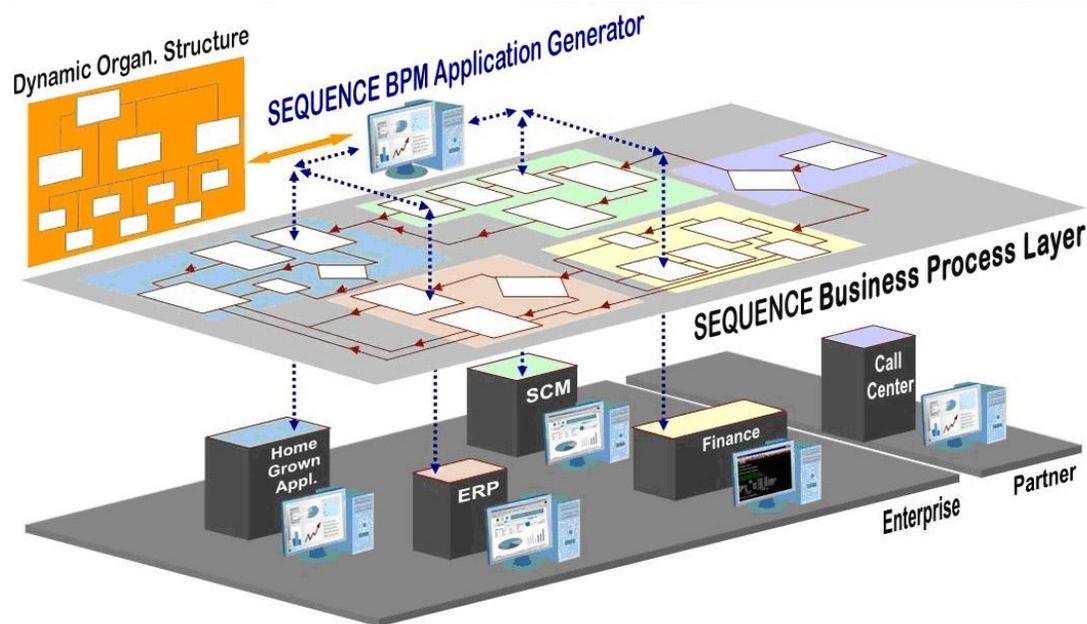
SEQUENCE provides business users with an intuitive tool to model their existing and new business processes in a graphical flowchart-based platform. By modeling the steps and using predefined wizards to enable and reuse elements, you can rapidly create a process and convert it from a manual flow to an automated one. You are guided by day-to-day forms, task lists, automated integration into systems, emails and more.

#### ***The perfect integrator***

SEQUENCE integrates with all Microsoft products and with best-of-breed 3rd party software, so that working in a BPM environment becomes a natural extension of your daily activity. People of many languages and cultures around the world are very familiar with Microsoft Office tools and Outlook. For them, using SEQUENCE is a small and easy step to take.

Another SEQUENCE advantage is its scalability. It is suited to both single servers and NLB clusters, with conversion to process-oriented systems being dynamic and simple. The software, equally powerful as a stand-alone system or as an integrated component of an ISV/OEM solution, is among the fastest time-to-solution and highest ROI performers in the BPMS field.

#### **SEQUENCE Layers**



The system is constructed in three layers:

### 1. Infrastructure Layer (for Enterprise and Partners)

The system draws its data from the diverse systems within the environment of an enterprise or its partner. These include inputs from ERP, CRM, PLM and Finance systems and home-grown applications, as well as external services such as Call Centers.

### 2. Business Process Layer

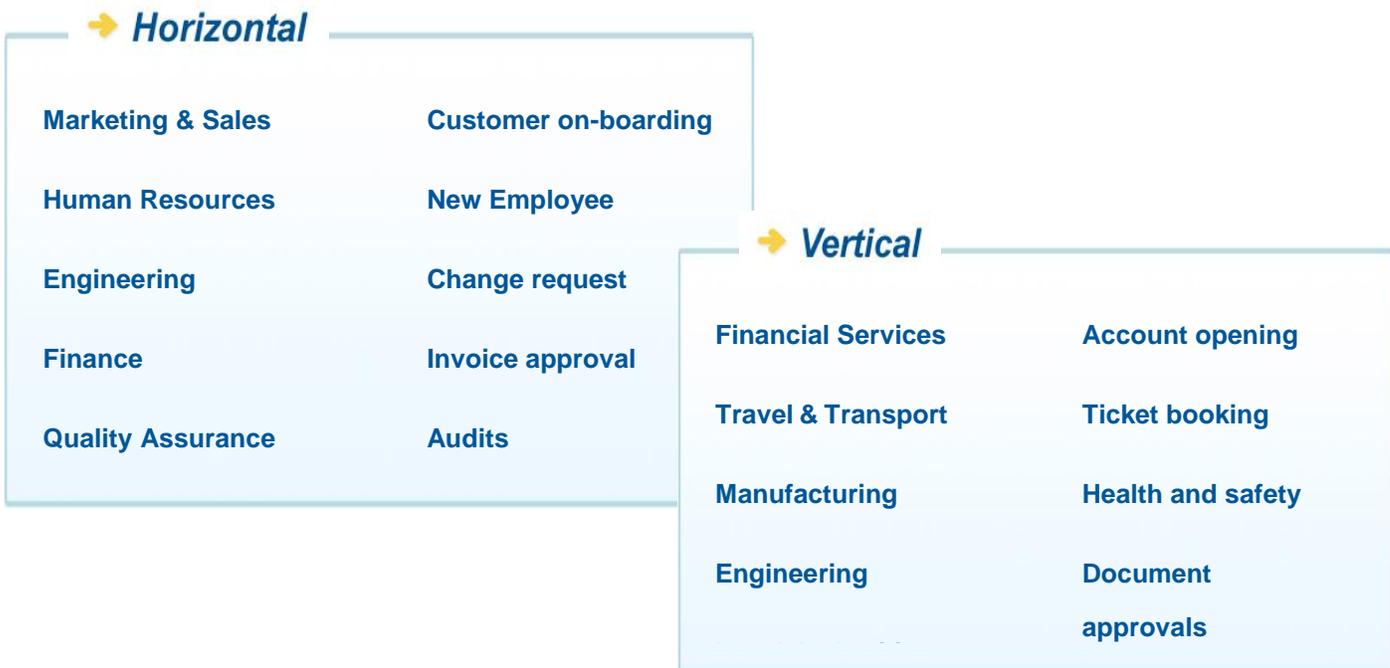
SEQUENCE's application generator creates the graphic workflow elements that make it easy and intuitive to build a complete operational process, regardless of its complexity.

### 3. Dynamic Organizational Structure

The user interface (based on .Net and IIS) is designed to ensure maximum connectivity to every department within an enterprise, and in any part of the world.

#### ***BPM benefits across the board***

SEQUENCE supports the full extent of BPM applications, applied at both the horizontal and vertical level.



## → SEQUENCE - PRODUCT DETAILS

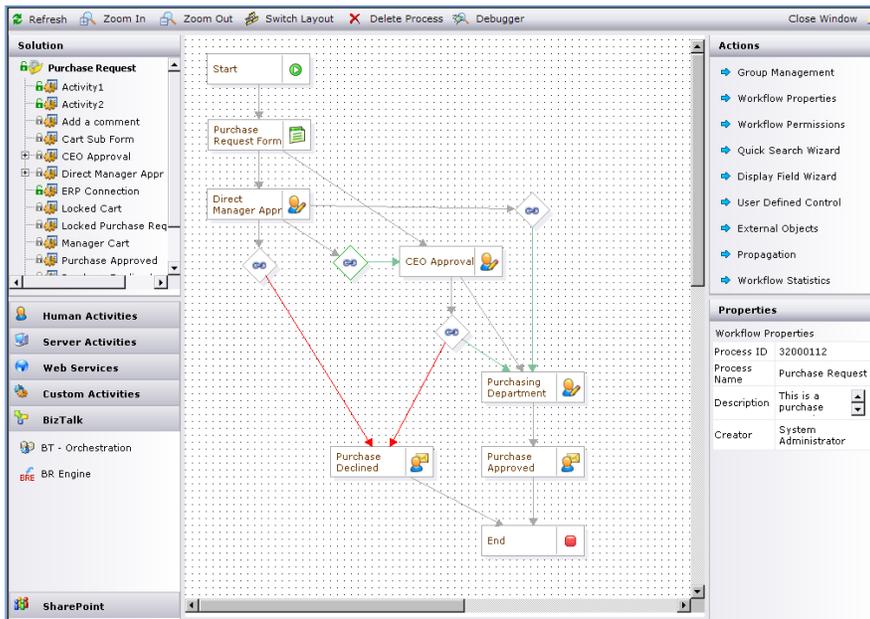
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### SEQUENCE modules lead to easier and faster BPM

PNMsoft offers a highly flexible and convenient approach to BPM (Business Process Management) with the following modules, all of which are 100% web-based and synchronized. None of them need coding or programming:

- SEQUENCE [Studio](#)
- SEQUENCE [Runtime](#)
- SEQUENCE [Engine](#)
- SEQUENCE [Dashboard](#)
- SEQUENCE [Administrator](#)
- SEQUENCE [Optimizer](#)

## STUDIO: Creating stages in the business process

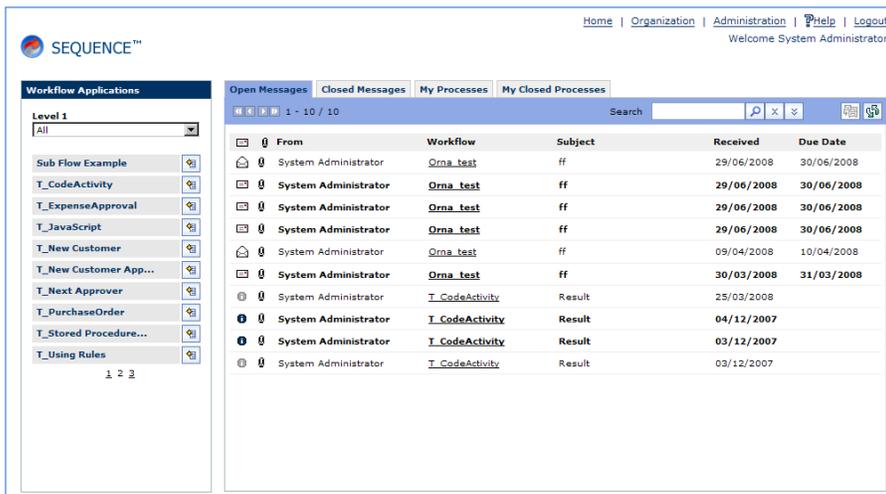


The SEQUENCE Studio module is a flexible web-based graphic tool that gives you powerful yet easy tools with which to define and create processes, activities, forms and business rules in a flowchart format. All you need to do is 'drag-and-drop'. The module includes the following elements:

- Convenient construction wizards and an Organization Structure Interface.
- Import/export of Business Process Execution Language (BPEL) and Business Process Modeling Notation (BPMN) formats can be published as web services.
- Mapping and interacting with popular CRM/ERP applications and other systems.

**STUDIO Bottom Line:** Using simple Drag, Point and Click commands, you rapidly apply incremental changes to the workflow process that you build on screen. It's easy and intuitive.

## ***RUNTIME: Enabling the business process during its lifecycle***

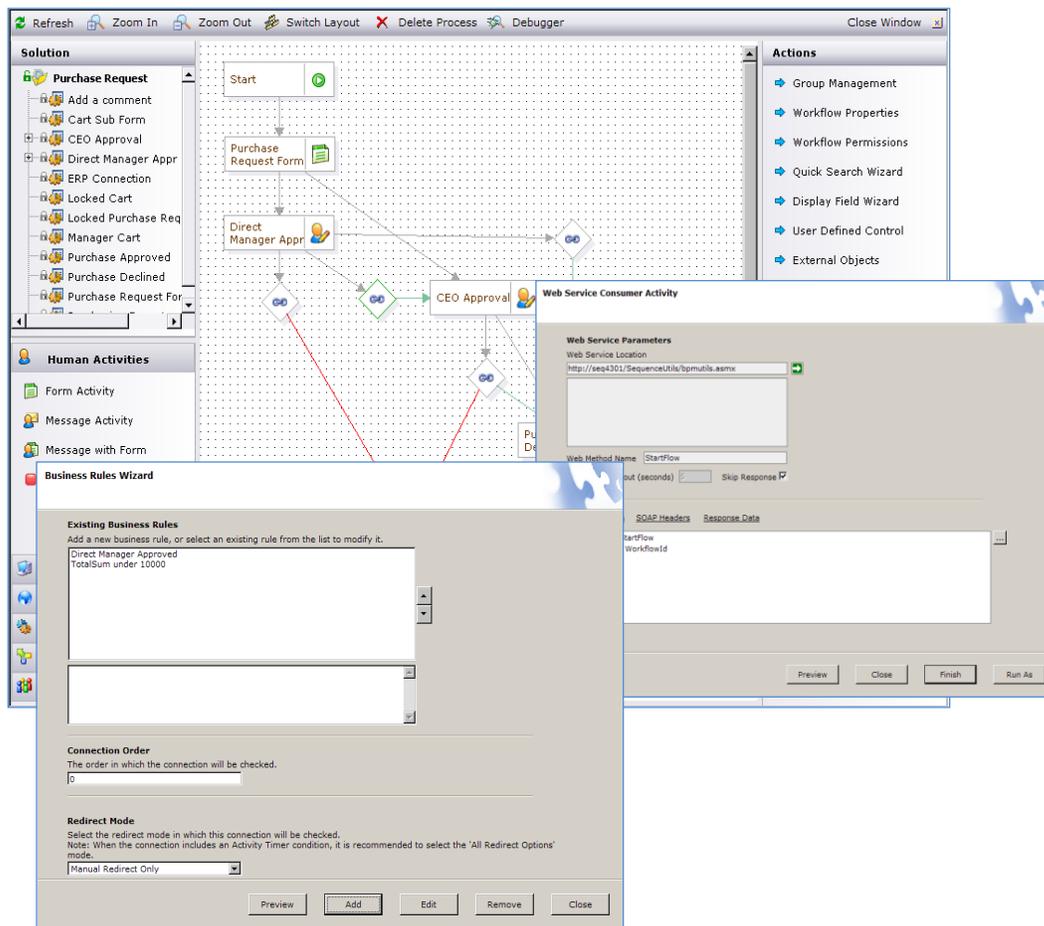


The SEQUENCE Runtime module has a user-friendly and flexible web-based GUI system that enables users at all levels based on user permissions to launch, monitor and complete processes using standard Microsoft look-and-feel interfaces. It includes the following elements:

- Interface with external systems and Microsoft Office Suite.
- Uses MS Outlook and MS SharePoint as an interface to manage activities
- Tools for adding alerts and notifications for tasks/items requiring action

**RUNTIME Bottom Line:** The system has the same familiar look-and-feel as the Microsoft environment, making it accessible and understandable to operators at all levels.

## ENGINE: Executing business process tasks

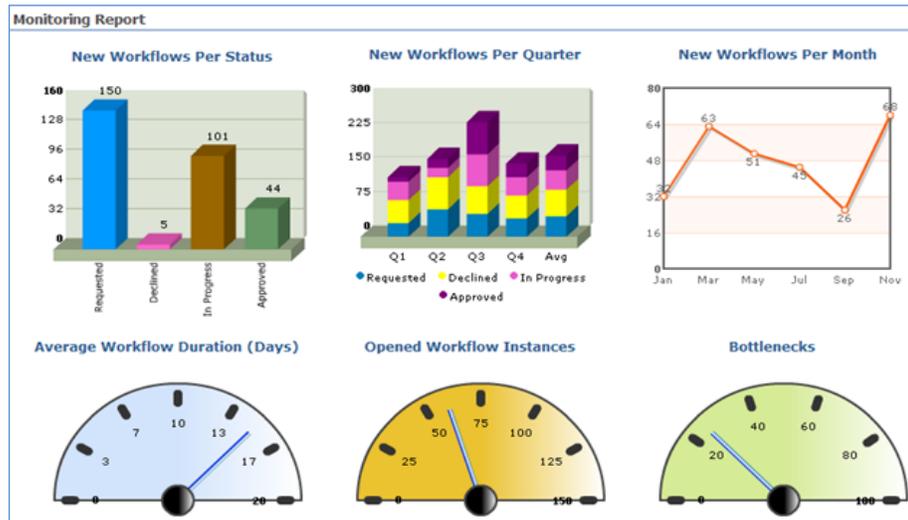


The SEQUENCE Engine module is robust and flexible, communicating with the software infrastructure to access, compile, and publish data. It launches and executes defined tasks and business rules by interfacing with external databases and systems:

- Use of web services makes it easy to integrate with external systems and forms
- Highly scalable operation – from a single server to an NLB cluster
- Processes data and business logic in real time, or in unsynchronized manner

**ENGINE Bottom Line:** By connecting to feeds from external systems via the Web, you'll automate many steps that used to be done manually. This helps you to gain significant savings in manpower time and project costs.

## DASHBOARD: Evaluating and improving business processes



Executives and supervisors use SEQUENCE Executive Dashboard, a Share Point web-based module that is ideal for evaluating and optimizing BPM processes. It uses graphical representations to deliver a highly visible 'top-down' view for reviewing progress and managing users, roles and user groups. This tool improves productivity and efficiency in real time to positively impact the business:

- Monitors processes, tracks tasks and creates analysis reports
- Drills down using charts and graphs, locating bottlenecks
- Sets alerts based on business rules and key performance indicators
- Enables "What If" analysis
- Special generator for creating reports and queries

**DASHBOARD Bottom Line: "If you can't measure it, you can't manage it".** Highly graphic 'at-a-glance' displays give managers instant information, allowing them to identify bottlenecks and take control.

## ADMINISTRATOR: Controlling and monitoring business processes

The screenshot displays the SEQUENCE Administrator web interface. The top navigation bar includes links for Home, Organization, Administration, Help, and Logout, along with a 'Welcome System Administrator' message. A left-hand navigation tree shows various system entities, with 'Employee Roles' selected. The main content area features a table of Employee Roles with columns for Role Description and Remarks. An 'Update Table: Employee Roles' dialog box is open, showing a form to edit a role. The 'Role Description' field contains 'Team Leader' and the 'Remarks' field contains 'Development lead.'. Below the form are buttons for 'Update', 'Close', 'Reset', and 'Delete'.

Role Description	Remarks
Accounting	
CEO	
CFO	
	1
	3
Manager	
Marketing	2
Support Team	
Team Leader	
Tester	1

**Update Table: Employee Roles**

Role Description:

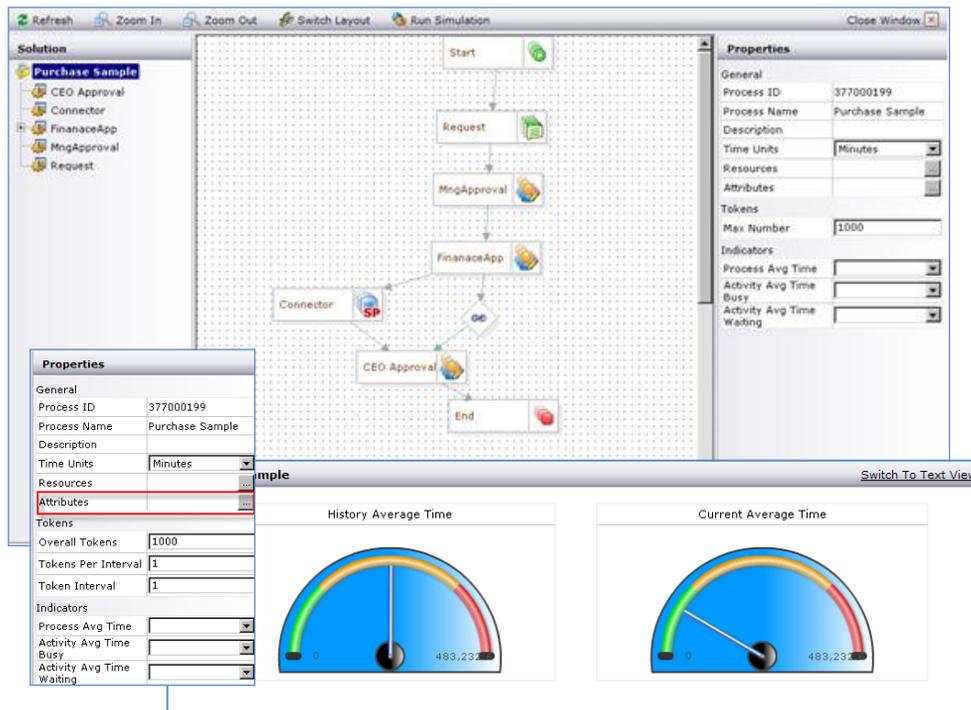
Remarks:

The SEQUENCE Administrator module offers system administrators a simple and efficient way to define, manage, control, and monitor system entities using web-based technology. It includes the following elements:

- Definition of organizational structure, roles, groups, tables permissions etc
- Seamless integration with active directory and HR systems
- Personalization and management of user profiles, groups and data tables

**ADMINISTRATOR Bottom Line:** This is the convenient way into the system. Information is transparent for all administrators, giving them the facts upon which decisions are supported.

## OPTIMISER: Ensuring optimal business processes



The SEQUENCE Optimiser module – this highly practical tool simulates a process and optimises it before it is introduced into the organization. It removes many risks from decision-making. Managers can now take decisions, create prototypes and test the impact of those decisions before applying changes to an existing automated mission-critical process:

- Whole processes can be migrated to a simulation environment in minutes
- A process can be evaluated in terms of impact on employees, infrastructure and time, saving valuable resources upon implementation
- Most components are interactive, closely reflecting the real business situation

**OPTIMISER Bottom Line:** Increases the optimisation of the completed process by making it easier to run various 'What-If' and impact scenarios.

## → WORKING WITH MICROSOFT

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### Integration with Microsoft

***"For data that you want to do business intelligence on... pulling that all together into a horizontal platform that's very simple to use... PNMsoft does a great job on fast deployments."***

**Bill Gates** at Microsoft Office Developers Conference, Feb 2008, USA

PNMsoft is a valued member of the Microsoft Business Process Alliance, an exclusive group of ISV partners (Independent Software Vendors) who are focused on creating BPM solutions adapted to the Microsoft platform. In recognition of its innovative technology, Microsoft has accepted PNMsoft as a Gold Certified Microsoft Partner. Our strong handshake with Microsoft helps you in many ways:

#### **Connectivity**

SEQUENCE is used with Outlook and Office worktools, which greatly reduces training time and increases its acceptance in the workplace. This kind of 'total integration' empowers you to rapidly build adaptive, mission-critical BPM solutions and span all your people, systems and organisations. SEQUENCE also interfaces directly with MS BizTalk Server 2006, MS SharePoint Portal Server 2007 and MS Project Server.

#### **People**

By closely integrating SEQUENCE with familiar Microsoft work tools, we encourage end users and business analysts to reach a high level of collaboration, information-sharing and decision-making.

#### **Process**

We offer a unified solution for BPM, built around service-oriented architectures and shared standards. Business processes are highly adaptive, making them simpler, faster to implement and easier to automate.

#### **Performance**

Ease of using the Microsoft platform also stimulates greater activity in monitoring processes, checking business rules and undertaking optimization actions. As the different members of your business circle – employees, partners and customers – all gain greater process visibility, your enterprise can enter a new growth track.

## → CASE STUDY: AMDOCS

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### Telecom & High-Tech

*"Our business challenge is working in a complex matrix organization which dictates efficiency and effective operational processes. We chose to work with Microsoft and PNMsoft in order to answer these needs. The PNMsoft platform creates transparent work processes which are independent of the organizational structure."*



**Eyal Ben Amram**, Global VP, Systems & Technology

#### **Amdocs deploys 30 complex processes within 3 months**

PNMsoft's SEQUENCE is helping Amdocs employees to significantly enhance their productivity at client sites. It cuts 30% off the set-up time needed to provide services to new customers – allowing revenues to flow in faster. The ability to complete process development in one-fifth of the time previously needed also brings major savings to the IT team.

#### **Challenges**

- Increase operating efficiencies on the 'manufacturing floor' and thereby reduce 'time-to-revenue' on new projects.
- Reduce the significant cost of operations such as recruiting and training
- Manage hundreds of complex business processes
- Coordinate across 16,000 employees and 50 countries

#### **Situation Analysis**

Amdocs is a world leader in Telco billing and customer management solutions. In 2007 the company recorded revenues of approximately \$3 billion and maintained a workforce of more than 16,000 professionals in over 50 countries.

With a strong commitment to growth, Amdocs was particularly concerned that its staff working at client sites around the world could become productive more quickly. They searched for a BPM system that could be highly customized and would support hundreds of business processes, many with hundreds of different decision points and business rules. The BPM system needed to provide high performance over a centralized server and interface to the major CRM and ERP systems that were already deployed within the organization.

## Strategy and Implementation

Amdocs selected PNMsoft's SEQUENCE for its scope and flexibility. The software's highly modular and flexible approach allowed Amdocs managers to rapidly set up customized automated processes and cover a wide range of organizational activities. In addition, full integration with Microsoft's desktop and Outlook meant that SEQUENCE could be globally applied, crossing language and cultural barriers while saving on training costs.

Among the business processes covered:

- Project Management: supervising progress
- Purchasing: handing purchase requests
- HR: managing recruitment and training
- Security: getting approvals for new accounts
- IT: handling SOX and Basel compliance issues

The benefits of automating many standard processes, synchronizing steps between teams and creating reusable components has given Amdocs a strong boost in increasing productivity.

## Results

Providing services to a new customer used to take several months due to extended set-up processes such as recruitment, training and relocation. Automating these processes has enabled Amdocs to cut the set-up time by 30%, generating millions in dollars in revenue that would otherwise have been delayed. SEQUENCE has also delivered a competitive advantage and improved service/value for Amdocs clients.

Amdocs IT personnel now initiate work processes in one-fifth of the time previously required. Since many processes are initiated every day, the overall savings to the IT department can reach millions of dollars annually.

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