

Workflow Process Modeling – a two day workshop with Alec Sharp, Clariteq Systems Consulting Ltd.

Workflow Process Modeling

Defining, Mapping, and Improving Business Processes – 2 days

Overview:

Business processes matter. Above all else, they matter to the enterprise, because business processes are fundamentally how value is delivered, whether externally or internally. So, understanding how to work with business processes is a vital skill for a wide range of business and IT professionals – business analysts, process architects, application architects, functional area managers, and even corporate executives. But too often, the available courses and literature either float around in generalities and familiar case studies, or descend rapidly into technical details, arcane theories, or 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, and design a new process. Everything is backed up with real-world examples, and clear, repeatable guidelines. Professionals around the world have benefited from this workshop and the methods it provides.

Description:

Participants will first learn exactly what a “business process” is, the key factors to consider when dealing with them, and the most common pitfalls and how to avoid them. On this foundation, the course moves on to specifying the scope and goals of a business process, modeling the current workflow, assessing it, and applying three critical process redesign techniques.

On workshop completion, participants will be able to:

- Describe the key factors that differentiate process and functional approaches
- Employ a variety of techniques to keep stakeholders involved, and promote “process orientation”
- Identify a “true” business process, and specify its boundaries and goals
- Model process workflow at progressive levels of detail using Swimlane Diagrams
- Stop process modeling at the appropriate point, and move on to other techniques or phases
- Conduct a structured assessment of a business process
- Develop a process redesign while avoiding common (and serious!) pitfalls

Key principles are illustrated throughout with workshop exercises and discussions. The material complements the techniques covered in our *Data Modeling* and *Requirements Modeling* workshops, which collectively provide the analyst with a powerful, integrated set of techniques.

Instructor – Alec Sharp:

With over 25 years of consulting experience, Alec has provided hands-on process modeling and improvement expertise throughout North America, Asia, and Europe – this workshop is based on real-world experience, not textbook theory. Alec has also delivered hundreds of Workflow Process Modeling workshops, and top-rated presentations at international conferences, including “The Seven Deadly Sins of Process Modeling,” “Crossing the Chasm – From Process Model to IT Requirements,” “Getting Traction for ‘Process’ – What the Experts Forget,” and “Five Common Errors in Process Improvement.” Alec is the principal author of “Workflow Modeling” (Artech House, 2001) which is a consistent best-seller in the field, and is widely used as an MBA text and consulting guide.

Target Audience:

Business analysts who are responsible for requirements specification; process analysts involved in business process re-design or improvement; business managers and content experts who will participate in process re-design or process-oriented application development efforts; process or application architects responsible for developing, coordinating, and promoting an enterprise-wide view of business processes.

Workflow Process Modeling – Alec Sharp – Clariteq

Detailed list of topics:

- Thinking in process terms – concepts, terminology, principles, and techniques
 - Variations on what is meant by “process,” and the impact on process identification
 - Three guidelines for well-formed processes
 - What makes a process a “business process?”
 - Real-world impacts of incorrectly identifying business processes
 - A clear method for determining when one business process ends, and another begins
 - Example – using this method in identifying “true” business processes
 - Summary – five rules for business processes
 - Impact of process identification for application and process architects
 - A brief history of “business processes” – the rise, fall, and rise again of “BPx”
 - Hammer’s legacy – understanding functional and process perspectives
 - The good and the bad, part 1: Why functionally-based organizations are a good thing
 - The good and the bad, part 2: Why functionally-based organizations introduce process difficulties
 - Reconciling the two – philosophies and methods for helping functions and processes get along
 - Introduction to modeling techniques – when to use decomposition, when to use flow diagrams
 - What makes for an effective “swimlane diagram?”
 - A five tier framework for relating business objectives, processes, applications, and data
 - Modeling techniques for each perspective
 - Achieving progressive levels of detail – working through scope, concept, and specification levels
 - Understanding the six enablers of a business process
 - A three-phase approach to completing a process-oriented project
 - A reading list
- Discovering your enterprise’s business processes
 - “Process areas” – families of related business processes
 - Depicting process areas with an “overall process map” or “process landscape”
 - The role of standard process areas such as “Customer Relationship Management”
 - Why top-down process identification often leads to incorrect results
 - A bottom-up method for process discovery
 - Beginning your analysis by clarifying terminology – a structured approach
 - Introduction to the major case study
 - Hands-on practice with process discovery – team work and group debrief
- Framing the process – scope, issues, and goals
 - A critical concept in *all* business analysis – separating the “what” from the “who and how”
 - Four components of the “what” scope definition – the essence of the process
 - Three components of the “who and how” scope definition – the current implementation
 - Tips for ensuring you haven’t defined the process smaller than it really is
 - Case study – hands on practice with documenting process scope
 - Initial assessment of the “as-is” process and goal-setting for the “to-be” process
 - A compelling and blame-free format for the case for action, and methods for communicating it
 - Clarifying strategic direction – the process “differentiator”
 - Case study – hands on practice with process assessment and goal specification
- Workflow models – techniques for modeling process workflow
 - Components and terminology in workflow models (“swimlane diagrams”)
 - The most common errors in workflow modeling – missing the point, “deception by sanitization,” and a rapid descent into detail
 - Avoiding errors with three questions to drive the development of your initial swimlane diagram
 - A real-life example of applying the three questions
 - Principles and guidelines – making your models useful, and knowing when not to model
 - Guidelines for actors – who or what can or cannot be an actor on a swimlane diagram,
 - 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
 - Representing the basic concepts in BPMN (Business Process Modeling Notation)
 - Additional symbols, keeping it simple

Workflow Process Modeling – Alec Sharp – Clariteq

- 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 (handoff, service, and task)
 - Definition, use, and example of each of the three levels
 - Business modeling vs. specification modeling, and the problems with being too precise
 - 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
 - Tips and guidelines to ensure you’ll actually get through the process
 - A reminder – the three questions to drive your initial “handoff level” workflow model
 - After the initial pass – five questions to validate and extend the model
 - Case study – hands on practice with developing the initial workflow model
 - Progressing to further levels of detail
- Tips for designing the to-be 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
 - Surfacing and challenging assumptions – using a “challenge session” to generate improvements
 - Characterizing the to-be process – generating creative improvements
 - Uncovering unanticipated consequences – using an enabler-based assessment to avoid problems and understand the requirements for process change
 - Factors to make the new process sustainable
 - Creating the new workflow – turning the to-be characteristics into a workflow model