TRIP REPORT

The Gartner Business Process Management Summit 2013 was held 13 – 14 May, at the Hilton Hotel in Sydney. This report summarizes and provides highlights from the event.

Overview

The BPM world as we knew it has fundamentally changed. For two days in Sydney, Gartner Business Process Management Summit 2013 showcased how the next generation of BPM goes beyond incremental efficiency gains and cost savings, enabling leaders to visualize and analyze business operations in real time, and take immediate, intelligent actions to execute on key business strategies.

Three distinct agenda tracks to accommodate any role or BPM maturity level, analyst-led roundtables, hands-on workshops, vendor showcases … If you were one of the more than 200 attendees, then you undoubtedly walked away with a wealth of ideas that can be put into action today to make your business processes smarter, more agile and better able to respond to constantly changing operational and customer dynamics.

Bruce Robertson,
VP Distinguished Analyst and Conference Chairman, speaking at the Gartner Business Process Management Summit 2013
Business Process Management Excellence Awards

Congratulations to the inaugural Business Process Management Excellence Award winners for Asia Pacific. These organizations have demonstrated excellence in using BPM, both as a management and a technology discipline, to achieve cost savings, continuous growth and excellent customer service.

Most Effective Use of BPM Technology
Winner: New South Wales Transport Management Centre

Best Business Outcome Driven by BPM
Winner: Colonial First State (Commonwealth Bank of Australia)

Best BPM Organization:
Winner: Bayer MaterialScience

The BPM Award winners, from left to right:
Mr Bruce Robertson, Gartner; Mr Tommy Cheung and Mr Nigel McCammon, Colonial State Bank; Mr Charles Nie and Mr Barry Cheung, Bayer MaterialScience; Mr Chris Ruwoldt, Transport for NSW and Ms Samantha Searle, Gartner
The Tracks

A
Aspire — Building a Strong BPM Foundation
(Beginner to Intermediate)
Targeted at those early on their BPM journey, this track will answer; where should I start, what should I do first and how can I ensure I deliver demonstrable value right from the beginning? These sessions introduce the core BPM disciplines — modeling, analysis and measurement of operational processes. With a strong foundation, attendees will be able to apply this learning to their first process improvement projects and immediately demonstrate business value.

B
Challenge — Growing Key Capabilities to Enable Change
(Intermediate to Advanced)
This track focuses on establishing the key capabilities needed to drive transformational change within and across your organization. Learn how to apply proven techniques, frameworks and approaches; learn how to win political battles without engaging in process warfare and develop a culture of accountability, flexibility and collaboration across your value chain. Whether you are focused on cost reduction, product innovation, revenue growth or significant organizational change, this track will provide pragmatic insights, based on real world examples that will enable you to overcome the status quo and deliver breakthrough results.

C
Transform — Accelerating Business Performance Results with Technology
This track is designed to help attendees move beyond “traditional BPM” (which has largely focused on incremental improvements) to “next generation BPM”, which aims to transform the way your business operates. The Nexus of Forces — cloud, mobile, social, and information — are fundamental to transforming how business operations will run and how people can better collaborate to drive higher business performance. Tomorrow’s processes will provide more visibility, be more dynamic and be a lot smarter. Learn how to select and adopt these technologies to transform organizational culture and behavior and dramatically differentiate your company.

Top of Mind Concerns — What Attendees Asked About
• How do I create a compelling vision that will engage and motivate my employees while building our process competences?
• How do I think “bigger” beyond just the process box and tie process work into achieving the strategies of the enterprise?
• How do I get started? Which processes should I work on?
• How do I identify stakeholders and keep them enthused?
• Where should business process owners be drawn from?
• How to make process ownership work?
• What pitfalls should I avoid after doing the pilot project?
• What business process governance should I put in place and how can I make it effective?
• How do I figure out what my end to end processes are? How do I measure them and what level of metric measurement is ideal?
• How should BPM program leads interact and align their programs with an MDM program, if it exists?
• What are companies doing with Intelligent Business Operations?
• Is it a good idea to combine the BI/Analytics and the BPM Centers of Excellence?
Key Take-Aways

1. Don’t ignore the political realities of a BPM deployment. Recognize the four key political landmines — resource, control, status, belief — and avoid or take sound tactics to defuse them.

2. BPM roles and skills are not static and must be constantly refined. Start with communication and process modeling, then advance [add] methodology, technical, and soft skills over time. Consider a business process competency center (BPCC) to accelerate adoption and impact for your BPM efforts.

3. Start with your stakeholders and what they care about for process modeling and analysis efforts. Validate that the questions you answer have business value, and identify the important questions you’re not answering.

4. Embed business-supporting process models in the organization, market their value, incentivize their use, and celebrate the successes.

5. Keep in mind the 3C’s when selecting BPM projects, settling on those that are a right-fit for your competence, confidence, and credibility. Look for projects that deliver near-term, incremental value.

6. The collision between big data and SharePoint is imminent, with implementations becoming more multinational and functionally diverse. Planning for big SharePoint implementations is critical for success.

7. To really drive business outcomes, BPCCs must integrate with other CoEs, defining specific activities, models and technologies to be shared and skills to leverage.

8. Get outside the box and rethink BPM. STOP driving efficiency only, START driving operational effectiveness, STOP tinkering, START innovating. STOP mapping all processes, START defining outcomes.

9. Success in today’s dynamic marketplace is a function of your ability to proactively out execute your competition. Intelligent BPM suites (iBPMS) enable proactive behavior to drive business outcomes.

10. BPMS/IBPMs are most appropriate for long running processes, where success depends on the close coordination of human efforts, systematized actions, and information flows.

The Summit attracted over 200 attendees from Australia, New Zealand and Asia Pacific. There was a cross industry representation with major segments from Government, Telecoms and Tech., followed by Banking and Financial Services, and Manufacturing.

The insight provided by the Gartner analyst was very helpful. I plan to take the ideas and concepts presented at the conference to take our BPM program to the next level.

Tim Lavelle, Development Manager, ADP
Key Recommendations and Session Summaries

For full documentation, download here if you attended the summit.

**BPM the Management Discipline — The Big Picture**

John Dixon
Managing VP

Getting to grips with the terminology and approaches for BPM can be a challenge. Understanding the fundamentals is critical to success. This session introduced you to what BPM can do, the key terms and approaches, the role of metrics and the importance of change management.

- Remember, “The only stupid question is the one not asked”.
- Prioritise where you need more knowledge.
- Start reading Gartner material related to that topic.

Next 90 Days

- Run a proof of concept project, demonstrate value to the business and communicate your success loudly. Find another opportunity and do it again. Build your 3 “Cs”.

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Getting Started With Modelling, Analysis and Improvement

David Norton
Research Director

Understanding how to model and analyze processes and behaviours, and collect and measure data before, during and after the project to deploy the right improvements for the problem being solved is a minefield for the uninitiated. This session explained these core disciplines, the relevant tools and the cost/revenue benefits of BPM as an overall approach to driving higher business outcomes.

Next Week

- Consider your stakeholders and their concerns — validate the questions you answer, and find the ones you don’t.

Next Three Months

- Focus on models with clear business outcomes and those that span the white space (but maybe not at first).
- Have a clear set of KPIs (pilot dashboard) and critical success factors (controls inputs).

Next Six Months

- Embed the models in the organisation, market their value, incentivise their use and communicate success.
- Strategic and policy level — not just operational.

**To the Point: Introduction to BPM-Enabling Technologies**

Teresa Jones
Principal Research Analyst

Increasing business pressures in a global economy make it critical for managers and employees to have better visibility and control over daily operations. Adjusting work based on yesterday’s reports isn’t good enough. BPM-enabling technologies (BPMT) enable a proactive approach to achieving desired results.

Key outcomes:

- The more complex your process, the more BPMTs will help you to maintain its accuracy.
- Everyone should invest in a BPA tool for better process analysis capabilities, especially if you make a lot of changes to your processes.
- Learn BPMN 2.0 it is far more powerful than V1.
- BPMS/iBPMSs are most appropriate for long running processes where success depends on the close coordination of human efforts, systemised actions, and information flows.
- Higher rates of change are best addressed with BPMS//iBPMSs implementations.

Building the Skills and Roles Necessary to Advance Your BPM Efforts

Bruce Robertson
VP Distinguished Analyst

Action Plan for Business Process Improvement Leaders

Monday Morning

- Worry about having the right roles and skills for increasingly complex and transformative BPM work (BPM sweet spot), not where they report.
- Start the effort to find a ‘process owner’ who is a credible and influential senior with sufficient authority to drive process change.
- Don’t skimp on transformational skills. These can make or break a project.
Next 90 Days

- Identify the BPM roles and skills you have — and don’t have.
- Establish a BPM skills road map and/or hiring plans.
- Meet with your sourcing or vendor management team to outline BPM resource needs.

Next 12 Months

- Establish skills in ‘build to change’ as well as ‘build to last’ BPM projects.
- Establish a BPCC and staff key roles if you must increase scope (projects that span multiple functions) or impact (more staffing for more projects).

Selling BPM to the C-Suite

John Dixon
Managing VP

The C-Suite wants to increase sales, attract customers and reduce costs. While BPM can help deliver these goals, it is often seen as low level, tactical and not strategic in value. This session concentrated on what is important to C-level executives, how BPM can help and how you can communicate the value of BPM to your senior team.

- Determine C-Suite Priorities and Hot Buttons.
- Identify Admired Competitors BPM Success.
- Identify Internal Opportunities.
- Identify Internal and External Allies.
- Educate C-suite on the BValue of NEW BPM Versus Old Process.
- Propose a Short-term Creation Implementation Plan.

Selecting and Scoping Your First BPM Project

Teresa Jones
Principal Research Analyst

Choosing the right first project for BPM is often critical to success. Much is based on your current level of competence and credibility with the business. Attend this session to get insight into making the right choices based on your capabilities and what the business really wants.

- Identify your ‘just right’ project.
- Know your ‘big picture’ program.
- Evaluate what worked and what did not.
- Refine how you approach project number two, three, four and so on.
- Communicate (and celebrate) your success!

To the Point: Successfully Marketing Your BPM Program

Michelle Cantara
Research VP

Action Plan for Marketing Your BPCC

Monday Morning

- Align the BPCC with strategic business initiatives.
- Identify which business process owners will struggle most with those business initiatives.
- Articulate the top 5 business process improvement challenges these process owners face.

Next 90 Days

- Craft a simple call to action.

- Establish a set of questions or guidelines for qualifying whether to work on a particular BPI project.

Next 12 Months

- Build a source a BPM training program and offer it for free.
- Continuously refresh the top 5 business improvement challenges.
- Keep your track record and progress to plan information up to date.
- Promote compelling success stories.

Bridge the Gap Between Strategic Vision and Operational Execution With Business Architecture

Lee Weldon
Research Director

Recommended Gartner Research

- Work with your EA team to understand the role of business architecture within your business overall and within their EA efforts.
- Define and socialize how business architecture can be used to focus BPM efforts.
- Focus on actionable, diagnostic and measurable deliverables.
- Use business architecture to create a business-driven “line of sight” back from processes to business changes and strategy.
- Don’t limit business architecture to just business processes; consider investments, people and organization changes.
- Use business capability modeling to illustrate business process change and increase stakeholder buy-in.
Stop Tinkering, Start Innovating

Elise Olding
Research Director

Recommendations: Rethink BPM Methods

Start the revolution. BPM… It’s Yours to Give Away.

STOP
• Driving efficiency
• Tinkering
• Mapping all processed

START
• Enabling effectiveness
• Innovating
• Defining Outcomes

To the Point: Making Governance and Ownership Work

Samantha Searle
Research Analyst

Recommendations
• The BP director should work with the BP owner to agree on responsibilities of process ownership.
• The BP director should establish BP governance to clarify what process-related decisions.
• Recognise and reward a good BP ownership.
• Consider empowering a process community to drive business outcomes, solve problems and make process-related decisions collectively.

Customer Experience Management: How BPM Fits Into the Bigger Picture

Ed Thompson
VP Distinguished Analyst

Monday Morning
• Discover if you have a VP of customer experience and make contact.
• Identify how serious the executive area in your organization are about customer experience improvements before investing time.

Next 90 days
• Update or create high level and detailed views of all customer touching processes.
• Seek out the voice of the customer data or hijack market research or find budgeting for surveying customers about the processes.

Next 12 Months
• Work on two or three of the most critical processes with a focus on the most critical steps in those processes form the customer viewpoint.
• Calculate the ROI for BPM from improving the customer experience through reduce need to acquire or marketing spend.

Making Your Centers of Excellence Work Together for a Bigger “Bang per Buck”

Bruce Robertson
VP Distinguished Analyst

Action Plan for BPM

Monday Morning
• Determine key PPM, EA and IM stakeholders to work with.
• Develop BPCC marketing plan including case studies.

Next 90 Days
• Install BPM role in other COEs and invite the return.
• Develop first BPCC services model with deliverables, map into PM/SDLC (with PPM).
• Develop mapping of process into business capabilities (with EA).

Next 12 Months
• Develop metrics framework or hierarchy (with IMCC).
• Expand BPCC service model with more capabilities, capacity.

Overcoming Political Landmines to Accelerate Change

Lee Weldon
Research Director

Those who seek to lead change will encounter political challenges. Often the success of a project or initiative is dependent upon the ability of the leader to navigate these political land mines. This keynote focused on defining politics, the key political land mines and providing BPM leaders with specific tactics for dealing with each landmine.
Recommendations

• Be aware of the four political land mines and avoid them.
• When you cannot avoid the land mines, employ sound political tactics to defuse them.
• Continuously test for political integrity in yourself and your team.
• Remember that politics is a dynamic process — what is decided today can be different tomorrow.
• Always balance IT performance and political savviness — the objective is political success.

To the Point: Business Process Analysis: Pictures or Decisioning?

Next Week

• Look at your stakeholders and their concerns — validate the questions you need to answer.

Next Three Months

• Lay out an adoption road map; start small.
• Have a clear set of KPIs (pilot dashboard) and critical success factors (control inputs).

Next Six Months

• Embed the models in the organisation, market their value, incentivise their use, and communicate success.
• Strategic and policy level — not just operational.

Five Ways Cloud Can Help You Transform Your Business

Michelle Cantara
Research VP

Action Plan for Incorporating BPM Into Your Cloud Strategy

Monday Morning

• Complete the ITScore for Business Process Management Diagnostic Assessment.
• Read IT Score for Business Process Management.
• Identify your current BPM maturity level and current cloud service options.

Next 90 Days

• Identify the business capabilities that you are most likely to consume as cloud services over the next 24 months, and those you are most likely to provide as cloud services.
• Establish a business case for reaching a level of BPM maturity in the next 24 months that aligns with your organisations business strategy.
• Evaluate whether to pursue cloud options consistent with your current level or desired future level of BPM maturity.

Next 12 Months

• Fund future BPM projects with savings from cloud.
• Invest in brokerage skills if your organisation will be consuming or providing multiple cloud services as part of managing its day-to-day business operations.

Bringing Analytics to BPM

Ian A. Bertram
Managing VP, Business Intelligence and Information Management

Monday Morning

• Map out your most pressing business problems — what questions do you want to answer empirically.
• Create a finite list of the analytical teams that exist in your enterprise.

Next 90 Days

• Create some prototypes in a data discovery tool to address the business problems identified above.
• Subscribe to an industry analytic service relevant to your vertical.

Next 12 Months

• Put a team together that bolsters your organization’s ability to do high-volume forecasting and granular segmentation.
• Roll out a solution to support a tactical or strategic decision.

To the Point: Technologies for Today and Tomorrow’s BPM Usage Scenarios

Janelle B. Hill
VP Distinguished Analyst

BPM-enabling technologies can be very effective throughout the process creation and execution lifecycle. This session concentrated on both today and tomorrow’s usage scenarios and highlights what features of a BPMS/iBPMS are needed to support each scenario. Each case will be explained in light of typical business outcomes.
Monday Morning

- Determine the kind of process styles that are prominent in your organization.

Next 90 Days

- Assign a lead enterprise architect to assess your software infrastructure capabilities for software that match your process styles.
- Develop a plan to train application architects, developers, BAs, and BPAs on where to use situation awareness and citizen development in process styles.

Next 12 Months

- Implement pilot applications for process styles that will be needed in the future to compete.

Get Smart With Intelligent Business Operations

Get Smart With Intelligent Business Operations

To the Point: Process and Nexus: The Missing Link

Janelle B. Hill
VP Distinguished Analyst

The Nexus of Forces (cloud, mobile, social, and information) creates new opportunities and challenges for businesses. Placing the Nexus in the context of process puts the focus on business value rather than technology adoption.

Summary: The Nexus Will “Un Process” the Process

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<tr>
<td>• Directed workflows</td>
<td>• Outcome-driven flows</td>
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<td>• Prescribed, rigid approaches</td>
<td>• Co-creative, collaborative approaches (inclusive of customers, competitors, consumers, partners, and internal staff)</td>
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<td>• Prescribed roles and authority</td>
<td>• Available and recognized expertise</td>
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<td>• Inside-out view</td>
<td>• Outside-in driven</td>
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<td>• Methodical approaches</td>
<td>• More open, with guidance and guard rails, not procedures</td>
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<td>• Internal management controls</td>
<td>• Visible, real time metrics for monitoring process, auto generated metadata for control</td>
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<td>• Single, standardized best practice</td>
<td>• Emergent practices</td>
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<td>• Focused on gathering a knowledge stock, protecting it, and exploiting it</td>
<td>• Focused on rapid learning — knowledge exchange, differing perspectives, identification, experimentation, and exploitation</td>
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Organizations are looking beyond efficiency and towards improving operational effectiveness. Intelligent business operations (IBO) is about making processes smarter. It is where real-time analytic and decision management technologies are integrated into activities that run the business, closing the loop between operational insight and action.
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Post Event Resources

Recommendations Summary
A recommendations summary containing all of the key recommendations from the Gartner analyst sessions is available for download from Agenda Builder. Please look for the “Recommendations Summary” file.

Learn more with relevant research
Want to learn more about the topics that interest you most? Turn to the end of each session presentation for a list of related Gartner research notes. Select Gartner research is available on demand at gartner.com.