Intelligent Business Process Management (iBPM) & Dynamic Case Management (DCM)

transformify

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What is Business Process Management?

Business process management (BPM) is the organizational discipline in which people use various methods, tools, and platforms to discover, model, analyze, measure, improve, optimize, and automate business processes that make up the core of its business.

Gartner defines business process management as "the discipline of managing processes (rather than tasks) as the means for improving business performance outcomes and operational agility. Processes span organizational boundaries, linking together people, information flows, systems, and other assets to create and deliver value to customers and constituents.

As an approach, BPM sees processes as important assets of an organization that must be understood, managed, and developed to deliver value-added products and services to end-users or clients. This approach closely resembles with other continual improvement process methodologies in order to make an organization more efficient and productive.

BPM initially focused on organizing the business processes with the use of information technology. It has been designed to integrate human-driven processes in which human interaction takes place in series or parallels with the use of technology. For example, workflow management systems can assign individual steps requiring deploying human intuition or judgment to relevant humans and other tasks in a workflow to a relevant automated system. Today, however with the advent of Cloud Services, Machine Learning (ML) and Artificial intelligence (AI) and the possibility to train models and machines to think like humans, changes the landscape of BPM.

To achieve the goals of BPM, some tools allow users to:

- visualize – functions and processes
- measure – determine the appropriate measure to determine success
- analyze – compare the various simulations to determine an optimal improvement
- improve – select and implement the improvement
- control – deploy this implementation and by use of user-defined dashboards monitor the improvement in real time and feed the performance information back into the simulation model in preparation for the next improvement iteration
- re-engineer – revamp the processes from scratch for better results

This allows to simulate business process changes based on real-life data, not just assumed knowledge. The coupling of BPM and industry methodologies allow users to continuously streamline and optimize their processes in order to make them more market relevant.

Research on BPM has increased attention to compliance since 2012. While flexibility is a key component of BPM, business processes must also be able to adapt to changing environments. Compliance with policies and government regulations should also not be overlooked, as organizations from private and public sectors are very concerned about compliance while implementing their processes.

What are intelligent Business Process Management Systems?

It is common to confuse BPM with a BPM Systems (BPMS). BPM is a professional discipline done by people, whereas a BPMS is a technological suite of tools designed to help the BPM professionals accomplish their goals, and should not be confused with an application, solution or system developed to support a particular process. Solutions and systems represent ways of automating business processes, but automation is only one aspect of BPM.

BPM is a great. But iBPM goes one step further. It includes cloud computing and real-time decision making by adding layer of intelligence with business logic, rules, Machine Learning (ML) and Artificial Intelligence (AI). This creates dynamic workflow experiences that are quick to implement using a cloud-based platform with No-Code and Low-Code tools.

In fact, iBPMS can link people, machines, and the Internet of Things (IoT) to ensure both support and intelligence for repeatable, organization-specific processes. As concept that supports value-added knowledge work, was introduced by Gartner in 2021. Since then, businesses have called iBPM the future of forward-thinking enterprises.

How does iBPM differ from BPM?

How would you make your BPM smarter? Maybe by connecting different technologies that weren't part of the first iteration. iBPMS is basically a revamp (meaning improving the structure or appearance of something) of traditional BPM. It uses cloud technology to add value to your business processes. It is the most powerful version of BPM. iBPM, for example, is more dynamic and provides better operational responsiveness than BPM. These are just a few of the many ways iBPMS differs from BPM:

- Supportive real-time analytics for intelligent business processes.
- Highly complex event processing.

It is easy to see why so many companies are choosing to implement an iBPM system. Businesses can now manage their complex processes effectively and gain a competitive edge by introducing cloud platforms that incorporate workflow engines that can also streamline and automate repetitive tasks with microflows.

ML/ AI supports iBPMS and solves even complex requirements. This gives companies the ability not only to increase operational accuracy and automation, but also to make data-driven business decisions.
Companies must adopt iBPMS if they want to improve their BPM. Even relevant wrapper functions are possible to be added to manual and automated processes.

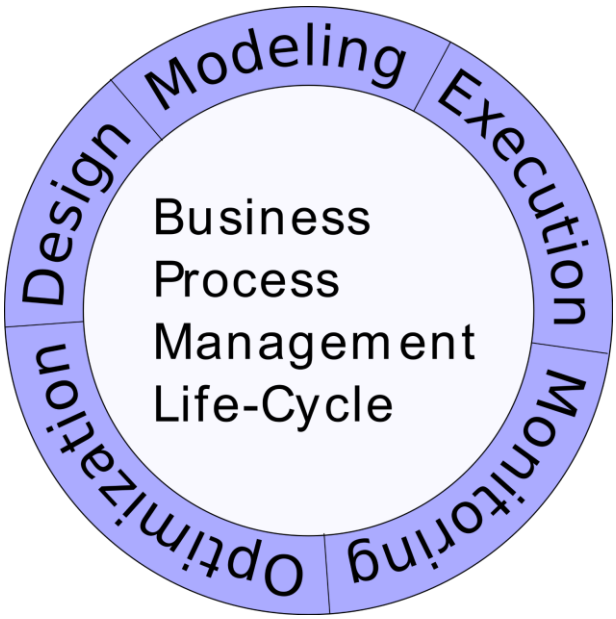
Kai Wahner (TIBCO Software Inc. Technology Evangelist) states that an intelligent business process combines Big Data Analytics, Big Data, and BPM. This allows humans and solutions to make data-driven business decisions based upon big data analytics. Instead of a process starting the action—data starts the action. iBPM combines BPMS and a Decision Management strategy, which allows rule based as well as analytical decision-making to be embedded within a process.

As a result, iBPM stemmed from BPM's inability to become more dynamic and emerged because businesses needed intelligent processes which original BPM tools fell short of.

iBPM system is useful for organizations that want to add to go one step further with their existing BPM efforts. This technology allows businesses to automatically add relevant functions to their processes.

BPM Life Cycle

Business Process Management activities, can be grouped into the following categories:



Below you can find out more about each step of the lifecycle:

Step 1: Design

Business analysts analyze current business logic, processes flows, the factors within it, alerts and notifications, standard operating procedures, and interview stakeholders to determine the desired outcomes.

The improvement proposed could be in human-to human, human-to system, or system-to–system process schemes. It might also target regulatory, market or competitive issues that the enterprise is facing. Both, existing processes and the design of a new process must be synchronized and not cause major outages or interruptions.

Step 2: Model

Modeling is a way to take the theoretical design and make it real by introducing combinations of variables. The proposed new ones may also include "what-if analysis" that determine how the process might operate under different circumstances.

Step 3: Execute

Business process execution is mainly about testing and deploying in production the new proposed and modeled business process. This can be done manually (human-driven) or automatically (software-driven).

BPM software suites such as iBPMS and No-Code/Low-Code platforms, today must offer integrated Workflow engine and provide visual capability for end-users to easily design process schemes, dynamically (on-going) modify processes, thus enable end-users to directly execute the changes.

These platforms may add additional intelligent layer to the workflows, by including Rule Engine that enables setting business logic which drives the process execution and resolution.

Step 4: Monitor

Monitoring means following the Key Performance Indicators (KPIs) of individual process, track metric/statistics using dashboards or reports, preview and determine the state so that the problems in its operation can be seen, identified and corrected. The degree of monitoring depends on what information the business wants to evaluate and analyze and how the business wants it monitored, in real-time, near real-time or ad hoc.

Step 5: Optimize

Process optimization includes retrieving process performance information from the modeling or monitoring phase; identifying the potential or actual bottlenecks and the potential opportunities for cost savings or other improvements; and then, applying those enhancements in the design of the process.

Step 6: Re-engineer

If the process becomes too complicated or inefficient and optimization is not delivering the desired output, the company leadership will recommend that the whole process be reengineered. Business process reengineering (BPR) has been used by organizations to attempt to achieve efficiency and productivity at work.

There are many ways when Business Process Re-engineering is needed. Take, for example:

- Customer complaints and refund requests are rising.
- Staff stress, disputes, and turnover are high.
- Chaos reigns after experienced employees depart or go out on leave.
- Profitability is falling.
- Sales leads are not being followed up upon quickly.
- Lacking corporate governance.
- Enterprises are struggling with cash flow.
- Inventory levels are rising.
- Cannot process and serve customer orders quickly enough.

Benefits of intelligent Business Process Management

iBPMS is the next evolution of BPM. Upgrade traditional BPM software and mix it with predictive analytics, process intelligence, and other new technologies like Cloud, ML/AI, and you get the formula which contemporary and modern businesses require to improve their organizational processes. The following are some other benefits:

- Superior integration with other tools
- Advanced analytics
- User-friendly No-Code and Low-Code tools for citizen developers
- Complex event processing, optimization, monitoring, and management.
- Cloud-based tools
- Ability to integrate with the Internet of Things (IoT)
- Ease of use
- Continuous process improvement (CPI)

An iBPMS, as advantages to your enterprise furthermore offer:

Mobility

Remote and field workers can now enjoy streamlined processes, such as those that deal with logistics or even installations. This also helps improve consistency and the measurability of automated tasks.

Advanced analytics

In order to track and improve workflows, you need to use data-driven analytics that rely on precise analytics. This is especially important when providing predictive and optimized processes that affect end-users and customers. This may require applying forecasting techniques such as Data Mining, Machine Learning etc.

Social capabilities

Real-time intelligence will be the future of work. This requires a new approach to social engagement. Machine learning will be required to identify the actions that customers input in order to facilitate dynamic engagement.

BPM Suites

Recently, a completely new market has emerged for enterprise software that utilize BPM concepts to create, automate, organize, and monitor processes. This kind of software solutions that embrace and integrate workflow and business rules engines, business process modelling, business activity monitoring and Human Workflow represent the foundation to the integrated Business Process Management suites, which according to Forrester are grouped as:

- human-centric BPM
- integration-centric BPM (Enterprise Service Bus)
- document-centric BPM (Dynamic Case Management)

Common thing that is becoming ever-prevalent feature of all BPMS platforms is Rapid application development using its No-Code/Low-Code principles. RAD enables businesses to deploy applications more quickly and more cost effectively, while also offering improved change and version management.

Gartner points out that businesses that embrace these systems will have lower maintenance costs for legacy systems and be in a position to afford more investments for growth and digital transformation.

So, What About Dynamic Case Management?

Dynamic Case Management (DCM) involves the management of the complex and complete set of processes that make up an individual case, which usually involves multiple people and/or departments. A case file refers to a collection of information that relates to a specific instance of something such as a person or company, an incident, problem, incidents, files, requests for goods or services, purchases, marketing actions, projects, thus contains all records and documents that are needed to track the case's history.

Dynamic Case Management means setting individual process scheme for each case with known starting activity and unpredictable final state (they only end when the case has been completely resolved).

DCM, also known as "adaptive case management" (ACM), is both a technology-based and human-based approach driven by incoming events. These events alter the context of the information and require responses from caseworkers and other knowledge workers. DCM's ultimate goal for such workers is to assist them in making faster, more accurate, and better decisions.

So, why DCM can be complex?

- Multiple processes may intercept, and occasionally their predefined flow disrupted.
- Cases require substantial flexibility and agility.
- Cases demand intervention from many caseworkers and end-users.
- There is a lot of information being processed. Both structured and unstructured.

How DCM is different than iBPM?

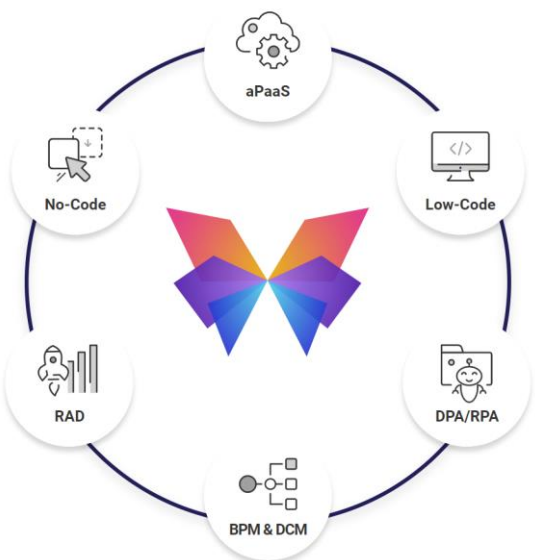
DCM is similar to business process management (BPM), in a way that it also aims to improve workflow and task management. It refers to coordination of a service request (case) in finance, health, insurance, legal, citizen or human resources-related matters, on behalf of a subject such as a customer, a citizen, or an employee.

Dynamic Case Management, however, is more flexible than BPM and is focused on managing unstructured, dynamic ad-hock processes. These processes are often not repeatable and require extensive interaction among human participants to reach an outcome.

Case management finds its application in certain types of processes, such as healthcare, insurance, legal, finance, citizen, or human resources-related matters where caseworkers must review extensive documentation over longer period.

How does Transformify exploit iBPM/DCM

Our Platform for digital transformation provides all the tools, latest technology stack, methodologies and development approaches (as No-Code, Low-Code, RAD) your enterprise needs to design and manage complex business processes and cases: integrated Workflow engine, Business Rule engine, Connectors, APIs and Cloud Native resources to keep your focus on productivity, performance, agility and end-user/customer happiness.



Optimize your processes

and decision making.

Transformify

provides technology for

innovation and productivity,

for everyone and

everywhere.

With Transformify you can achieve continuous improvements or business process re-engineering to drive your digital transformation within your enterprise by:

- Getting end-to-end visibility and understanding of all activities and decision rules for your key processes and cases (incidents, investigations, and service requests).
- Ensuring full privacy, security and compliance with transparent workflow design and dynamic rules to meet every aspect of your internal and external environment.
- Transferring knowledge with well-documented workflows and decision rule logic that can be easily shared with other employees.
- Embracing continuous improvement or business process re-engineering to eliminate any kind of waste and inefficiency of your processes or cases.
- Making fast decisions and changes to get superior performance and competitive advantage.

Request an invite for Transformify private preview (limited availability) to try out our amazing all-in-one platform.