Simplify Business Process Automation with Bonitasoftware

Evoke Technologies
Simplified Solutions For Everyday Challenges

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SIMPLIFY BUSINESS PROCESS AUTOMATION WITH BONITASOFT

Executive Summary

In today’s dynamic and competitive business environment, organizations across the world face a common business challenge, which is optimizing their processes and improving their operational effectiveness. In order to overcome these emerging business challenges and gain a competitive advantage, you need a technology partner having deep-domain expertise in Business Process Automation (BPA). Your technology partner would be able to understand your core business challenges and work with you to automate your processes, which would allow your organization to improve a wide-range of processes that involve people, systems, and data.

Business Process Management (BPM) is now an integral part of organizations world-wide. It has become increasingly challenging for businesses to sustain growth without utilizing business process management practices / tools to align their processes effectively. BPM solutions allow businesses to improve their process effectiveness and at the same time align their processes. The white paper aims to cover important aspects of improving business processes by utilizing BPA solutions. This white paper is intended for business executives and process owners responsible to improve the quality and efficiency of business operations.

Introduction

Business success largely depends on the effectiveness of process management. Manual processing can often lead to costly errors, delays and omissions. While working in teams, members would require access to the latest information, irrespective of their location, whether they are located within the same building or across the globe.

Evoke Technologies workflow team can assist Businesses by automating their processes, which would help them optimize, control and implement business solutions effectively. Process automation helps businesses improve their efficiency by allowing real-time status reporting, which helps in better coordination among geographically diverse teams.

Need for Process Automation

Business processes often evolve as manual, undocumented procedures, but later turn complex enough to be managed without automation. As the business expands these processes turn out to be laborious and require constant maintenance. In order to mitigate these challenges, businesses must continually improvise their processes to align with changing business dynamics.

In the current economic scenario most of the businesses are aware of the evolving concept of Business Process Management (BPM) and the wide-ranging benefits it offers. Some of the immediate benefits include automation, better visibility, and improved efficiency. Although, businesses recognize the importance of BPM they are hesitant to implement these solutions for reasons such as cost, time and effort.

In today's rapidly changing business scenario, it is essential for an enterprise to take advantage of Business Process Automation (BPA). It is a concept that is helping businesses manage complex tasks efficiently with greater accuracy and also allowing faster execution time.

Businesses may typically try out one of the three approaches to Business Process Automation (BPA):

a) Extending IT service management systems.

b) Implementing specialized Business Process Automation tool sets or
c) Creating automated process workflows on the back of a business process management (BPM) implementation.

Business Process Automation (BPA) is often considered as a subset of Business Process Management (BPM). BPM has been referred to as a “holistic” management approach that strives to promote efficiency at an enterprise-level for the processes that matter the most to a business. In the illustration cited below, the process automation mostly focuses at a department level.

Both BPM and BPA are treated as major initiatives, whose complexity and scope limits their suitability to major or core business process workflows. Business enterprises have hundreds or even thousands of smaller process workflows, sometimes involving only a handful of individuals or single departments. Many of these workflows include numerous manual processes. The manual nature of these processes may result in costly errors, delays, and increased inefficiencies, which makes a good business case to automate workflows. However, business enterprises believe that their processes are too small to justify the development effort and cost incurred for process automation.

Business Process – Illustration

Let’s take a classic example of a standard “Order Management System” (OMS), which is typically managed by an operations team. The order management system covers several modules, out of which “customer account tracking” is one of the most important activities.

While working on customer account tracking subprocess the operations team will have to manually track various changes that took place in relation to permanent address details of their customers (names and addresses of individuals and businesses). The process also contains details of individuals, who have filed for a new address with State Postal Service (SPS).

The operations team compares the data against SPS database utilizing the data provided by an external vendor (the vendor supplies OMS operations team with records of customers, whose address on file differs with that listed in the SPS database).

Below is the process in relation to the way change of address records are handled by the operations team, after receiving the data from the vendor.

Step 1
Identify the list of customer records (with the help of a third party vendor) whose address details stand changed with reference to State Postal Service (SPS).

Step 2
Post receiving records from the vendor, operation team member’s add the records onto their online database software and each row (customer record) is treated as a separate case.

Step 3
The operations team search internal records of the customer (using a unique customer account number) to obtain the customer's current status. Based on the current status the following activities are performed:

a) **Inactive Customer:** If the customer is inactive (i.e. If a customer is no longer registered with the company), a note is made in a spreadsheet [under the “notes” column] and the case is marked as “closed”.

b) **Active Customer:** If the customer is active, the following actions are performed:

i) The operations team member compares the customer’s address shared by the vendor with customer’s address held with the company.

ii) If the address matches, the operations team makes a note in a spreadsheet and the case is marked as “closed”.

iii) If the address does not match, the operations team sends out emails to the concerned departments (internal) to verify and confirm the new address of the customer.

iv) When a customer responds to the email, an action is taken based on the response – i.e. either updating the address or marking the case as closed.
v) If no email address is mentioned in the customer’s profile, the operations team makes a call to the customer to confirm the change of address. If the customer mentions any changes to his/her address, they are asked to send out an email to the operations teams with their new address.

Solution Approach

We follow a structure solutions approach to Business Process Management. Our business process automation solutions focus on the intersection of human-based and automated workflow processes, this allows businesses to:

a) Increase efficiency and productivity of the business processes.
b) Continuous improvement in the business processes.
c) Improves quality, consistency and compliance of the business processes.
d) Enhances company’s agility and flexibility to handle the business processes.

Automated Workflow

The first step in implementing a fully automated workflow in conjunction with BPM is to identify the bottlenecks in a process, which inevitably occur as a result of existing manual processes, if not addressed theses start affecting the productivity of the business process.

There are three major business factors that any business enterprise will focus on while implementing process automation, which include:

a) Increase process efficiency and productivity.
b) Ensure business compliance, security factors, and disaster alertness.
c) Increase return on investments (ROI).

To identify bottlenecks in the existing process, we can frame the following set of question targeting the business process executives and management teams, which allow us to find ways to improve the current process resulting in process optimization.

Following are the list of questions specific to each business factor:

Increase efficiency and productivity

a) How many records or what is the size of data handled, while managing business process or workflow?
b) How many stages each record has to move in the entire process and how it is being moved?
c) Where are the records (data) stored and which user types need the access to the records?
d) How is the tracking of the records (data) being done?

Ensure compliance, security and disaster alertness

a) How secure are the records (data) existing in the current system?
b) What is the criticality / importance of the records (data) stored in the file?
c) How can you retrieve the record (data) / files lost in an unforeseeable disaster?
d) How expensive is it to implement control access / procedural controls of such records (data)?

Increase ROI on IT investments

a) What is the size of the team that is working on the current business process?
b) What is the success rate (number) of records being successfully updated based on the response from a customer?

c) What is the average time spent by the operations team for closure of each customer record?

d) Is this data available in any existing business software application?

e) How long does it take for records (data) to be updated onto the system?

f) Is the data manually being re-entered?

**Bottlenecks in the Business Process**

With reference to our sample order management system process, we have observed that the following manual steps are making the activity cumbersome for the operations team:

- a) Customer address change comparisons.
- b) Customer detail’s verification.
- c) Notification about the address change to the customer.
- d) Customer notification, follow-up and tracking.

The existing manual process is not scalable, which is leading to certain services being undelivered and the company is losing discount points from the State Postal Service (SPS).

**Proposed Solution**

The current process is completely manual and data is being maintained manually using spreadsheets. It is difficult to guarantee security of the data and it is also complex to track the progress of records using the current process flow. It is also complicated to track and measure the efficiency of the process as a whole.

After carefully analyzing the current process, we strongly recommend automation of process to enhance workflow and streamline the process, which would benefit the company.

The customer account tracking sub-process needs to be automated by enhancing the existing workflow. The proposed solution should be able to perform following tasks automatically:

- a) Ability to read the address change data from external (third party) vendor’s file and create a case for each of its existing customer records by utilizing a unique customer account number.
- b) Compare the address reported by the State Postal Service (SPS) with company’s master data.
- c) Auto-generate address change notification e-mails (on a weekly basis) to all customer contacts.
- d) Track customer confirmation (reply / feedback) e-mails and automate reply e-mails with relevant customer case details.
- e) Provide an online form (alternate option) to customers, which would help capture feedback about the address change process. The workflow would automatically update the customer feedback onto respective customer case details.
- f) Create simple steps to update customer’s profile (by operations team) based on the customer feedback.
- g) Analytics view to monitor case history details with the help of ‘key performance indicator’ (KPI) and provisions to generate status reports.
Bonitasoft and Its Usage

Evoke Technologies utilized Bonitasoft – An open source workflow and BPM software for the workflow design of this business process.

Bonitasoft includes the following set of components - Studio, Execution Engine, and Portal. The Bonita Studio is widely used by process analysts to create a design using the industry standard BPMN 2.0 notation, it further allows them to automatically generate workflow related documentation. Bonita Execution Engine allows developers to easily implement the proposed workflow solution and design process related web forms, and also allows them to use it as a multi-user repository. Bonita Portal helps process related business users to interact with the newly designed workflow-based applications and perform process related activities.

How Evoke Utilized Bonitasoft?

a) We utilized the ‘Event Management’ feature to schedule process-related activities (e.g. auto-generated email notifications to customers).

b) Customized various connectors for interaction between Bonita engine with line of business (LOB) applications.

c) Effectively managed business processes using Bonita REST (Representational State Transfer) API integration.

d) Used Bonita Analytics feature for extensive reporting.

The following (figure-1) diagram depicts the integration of different components utilized to achieve the proposed solution.

Figure-1: Solution Approach - High-level Component Architecture Diagram (Integrations View)

Here’s a look at some high-level details of the architecture Evoke Technologies incorporated into the proposed workflow design.
Additionally, the solution can reuse the existing Application Programming Interfaces (APIs) that are available from Line of Business (LOB) applications to fetch the domain data into a workflow.

The following diagram (figure-2) depicts the automated business process workflow that needs to be implemented in the Bonita workflow engine.

Figure 2: Process Workflow (Implementation) Diagram Defined using Bonitasoft - Open Source Workflow & BPM Software

**Measurable ROI Elements**

Automation and standardization of process helps businesses to a great extent. Major benefits include:

- Improve and optimize process efficiency.
- Continued process improvement.
- Reduce time to resolution.
- Mitigate process gaps.
- Quick response to emerging business challenges.
- Maximize business profits.

**Benefits**

Management teams require concrete information and quantifiable business benefits before they take any decision. Vague references to the possible benefits of business process automation may not be sufficient for them to decide whether to go ahead and automate their processes. Below are some substantial benefits to support the cause of automation:
a) Firstly, the benefits of business process automation projects are multi-dimensional. There are no clear models available to exactly map the cost associated with BPA projects and there are no proven metrics to calculate ROI.

b) Before making an investment on any automation related projects, ROI is a critical factor that needs to be closely looked into.

c) Most of the businesses understand the need to optimize their processes to save costs. However, they lack a clear idea on the ROI factor, which would give them complete confidence to go ahead with BPA implementation.

However, there are few indicators which would help businesses measure ROI such as ‘direct benefits’ and ‘indirect benefits’. Some examples pertaining to these have been cited below.

Direct Benefits

a) Improvement in the operating structure and efficiency due to process automation.

b) Cut-down process gaps, failures and re-work factors.

c) Better staffing model, which will frame re-allocation of roles and responsibilities as part of business process modelling exercise.

d) Cut-down risk factors by having effective controls on the processes.

e) Standard and enhanced end-to-end process maps to reflect the company’s policies and procedures.

Indirect Benefits

f) Easy to handle change requests for future enhancements (as existing and standardized documentation and process mapping are in place).

g) Centralized repository of policies and procedures with details of end-to-end process mapping for cross reference.

a) Seamless integration between different business processes reflects in direct contact and interaction with IT and business staff.

b) Ease of developing new strategies to accommodate new clients on board.

c) Centralized business analysis and better project management with little effort and lot of control.

d) Expansion of Business Process Management to other departments with minimal effort and reduced external expertise.

e) Regulatory and compliance benefits and support to compliance certifications.

ROI Estimation

The table on the next page (figure-3) outlines the ROI estimation based on the process automation. The figure also provides data of pre and post workflow implementation.
Businesses worldwide are expected to provide customers with world-class service, higher reliability, and greater agility than ever before – which results in increased spending for them. However, we also have alternative ways to meet these goals i.e. by automating business processes. Businesses can leverage technology to their advantage. The easiest way is to automate their business processes, which after implementation would result in a host of savings, including cost, effort, time, improved resource utilization, security, compliance, improved response times, and agility. Before taking a decision to go ahead with BPA, businesses should spend considerable time finding the right technology partner who can assist your business in achieving process automation objectives and goals.

Evoke Technologies offers comprehensive Business Process Automation (BPA) and Business Process Management (BPM) solutions that enable organizations to effectively manage their business processes. Evoke has been immensely successful in recommending process improvements to their existing workflow. BPM is now a widely accepted practice world-wide, as it helps in effectively modeling business processes and delivering a practical solution to key business issues. The smart BPM solutions offered by Evoke help businesses to streamline their processes and improve efficiency.

Evoke Technologies uses Bonitasoft an open source workflow and BPM software for the workflow design and development. Bonitasoft allows users to design and optimize business processes using the industry standard BPMN 2.0 notation. It allows users to generate process documentation and KPI reports on the process data. It also offers the provision of connecter, which is a great value-addition. Bonitasoft is a highly flexible and powerful BPM suite for all types of organizations, which helps in developing flexible workflow applications.
Business Scope

Business process improvement and alignment is an ongoing challenge faced by businesses worldwide. Guaranteeing customer satisfaction, reducing costs and increasing efficiencies across the board is the primary objective of every business enterprise. Evoke Technologies has been assisting its clients by suggesting practical BPM solutions to manage emerging business challenges effectively. Business Process Management has now evolved to the next level and is now a widely accepted practice. BPM is allowing software companies to provide smarter solutions by creating workflows around business processes utilizing latest BPM tools.

Process Automation and Management Solutions

Evoke offers multiple BPA & BPM solutions that standardize and accelerate the deployment of software solutions, which helps businesses to enhance their processes. Successful business process management solutions require direct communication with the business process stakeholders. Evoke Technologies experienced BPM process consultants understand the entire process flow and chalk out a process oriented strategy to identify the best possible solution for each industry domain. With their unique BPA and BPM solutions, they can effectively integrate business processes, which results in significant time and cost savings for your business enterprise.

Evoke Technologies Approach

Evoke’s business process management solutions enable businesses to manage changes in their workflow effectively. Evoke follows a unique approach towards Business Process Automation, which allows businesses to optimize their processes by blending traditional business models with emerging technology practices. Utilizing top-of-the-line business process management tools, Evoke Technologies has been offering effective workflow solutions, which have helped client’s meet their process automation goals. Evoke has created an IT and management environment that reacts more quickly to changing business dynamics, through a process that involves a cycle of design, modeling, execution, monitoring and optimization. This helps in improving information flow and efficiency of business process.

About Evoke Technologies

Evoke Technologies is an innovative Information technology firm offering value driven software services that help businesses save significant costs and amplify their business systems. Evoke has been actively assisting its clients to constantly innovate and gain competitive advantage in the global marketplace. It has always laid greater emphasis on core technology practices that has helped them to consistently maintain quality standards in their key deliverables.

Evoke Technologies is a certified SEI-CMMI Level 3, ISO 27001 and ISO 9001 compliant IT enterprise, which focuses on building long term relationships with its clients. Evoke has always been on the forefront of offering cutting-edge technology solutions that enable its clients to meet their automation goals. Its project delivery and engagement models allow significant operational savings, thus adding value to its clients.

Evoke Technologies has gained strong expertise by assisting its clients across various industry verticals. It has built a strong governance and project delivery methodology that provides its clients with a superior edge. Evoke has a strong technical team that develops and deploys tactical solutions for all complex IT requirements of their clients. Evoke strongly believes in the offshore development model as it allows it to pass on considerable savings to its clients. Evoke is a preferred software development outsourcing partner for various businesses across North America.

For further information about Evoke Technologies, business process management services, please visit: www.evoketechnologies.com
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