

MESSAGE FROM THE PARTNERS



Welcome to the new year and the ninth edition of our quarterly newsletter—uPTake. We hope you are well rested and energised after the holiday period.

In this issue we explore one of PTA's specialty practices—analysis—and update you with our take on recent developments.

Our feature article delves into mobile business process management (BPM); plus we take a look at an emerging industry trend, Intelligent Business Process Management (iBPM).

You can find out how business writing skills training can benefit your organisation in PTA Happenings; and learn about an important cause in the Community section.

We love sharing our knowledge so we hope you find this issue informative. To see what else we've been reading and researching recently, find us on Twitter at [@pearsontrueman](https://twitter.com/pearsontrueman) or [linkedin.com/company/pearson-trueman-&-associates](https://www.linkedin.com/company/pearson-trueman-&-associates).

Suzanne Pearson and Shannon Trueman

BPM IN THE PALM OF YOUR HAND

It's no secret that we live in the portable age, where we expect to access information quickly and easily. According to an article in Forbes late last year, 'mobile Internet use is at an all-time high, with 63 percent of all cell phone owners admitting they use those devices to go online'.

Universities and schools are offering students portable learning options through the use of tablets and smartphones. A recent EDUCAUSE review claims university students now expect to be able to use their tablets, smartphones and consumer-based applications in their academic work.

Software companies are producing innovative technology options, with the introduction of Software as a Service (SaaS) and various cloud-based capabilities. The move from vendor-managed software packages to service-based options means greater flexibility and more freedom with information technology.

With advances benefiting organisations' technology streams well underway, it was only a matter of time before software companies reviewed how we manage business processes and extended this capability to new mediums. Emerging mobile Business Process Management (BPM) software allows organisations to move their BPM and knowledge management practices onto a mobile platform.

Aside from the obvious benefits of speed and ease of information access, mobile BPM enables people to make decisions in real time, with relevant people available to resolve, escalate or take action when an event occurs. Business executives have visibility over important business events and impacts to processes, allowing them the flexibility to act and make strategic decisions on-the-fly.

Mobility of information also opens up potential for a personalised approach to information management. Imagine an application that allows users to customise their own interface and control their knowledge management experience by:

- connecting with people in their organisation who have shared tasks and interests
- selecting information relevant to them, such as:
 - business process documents
 - policies
 - training materials
- setting their own learning goals and checklists.

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A mobile application with an interactive repository, which enables social communication within an organisation, creates connectivity between:

- employees and management
- employees and processes
- employees and their peers
- management and processes.



Figure 1: Mobile connectivity

Missed opportunities occur when process owners and operators are the only people involved in the process. If employees are offered a mobile BPM application, there is more opportunity for them to develop a sense of ownership over the processes impacting them. By increasing employee involvement in and responsibility for their processes, organisations see more people identifying potential process improvements and contributing to the overall success of a process.

Essentially, mobile BPM and knowledge management have the potential to empower employees and encourage them to be proactive about change, subsequently enhancing BPM within an organisation.

Sources:

Hendrix, Drew (2013). *7 Ways Mobile Will Change Business In 2014*, [Forbes.com](#)
Grajek, Susan (2013). Top Ten IT Issues 2013 – Welcome to the Connected Age, [Educause Review Online](#).
Grayson, Ian (2013). *SaaS is fast becoming the new normal*, The Australian online.

Mind exercise 1

BRAIN CALCULATOR*



Assume you are using a basic calculator and press the numbers in the order shown, replacing each question mark with a mathematical sign.

Plus, minus, multiply and divide can each be used once only.

What is the lowest number you can possibly score?

6 ? 2 ? 3 ? 5 ? 6 =

Getting the most from PTA

SUCCESSFUL RESOLUTIONS THROUGH PRE-PROJECT ANALYSIS

This time each year, hundreds of thousands of people worldwide find themselves in the same situation. Despite having the best intentions, our overly-ambitious New Year's resolutions have fizzled to nothingness.

Not surprisingly, the same can be said for organisations. The corporate landscape is littered with improvement or change projects that suffered a slow, painful death. Did they bite off more than they could chew? Were they chasing a moving target?

Recently, PTA worked closely with three leading organisations to evaluate their current process maturity and capability capital by providing business analysis services such as process and documentation reviews, process classification framework alignments, and so on.

For case-in-point, a relatively new and successful telecommunications company engaged PTA, as it was struggling to meet the demands of a growing customer base. Key stakeholders inside the organisation had expressed a distrust of external consultancies due to poorly scoped projects that were at that time festering away within the company with no clearly defined outcomes.

During the course of a one-week scoping engagement, PTA analysts identified that conflicting KPIs between business areas were causing a backlog of work, hostility between departments and ultimately a delay in gaining revenue—all of which were attributed to a lack of recognised processes and effective change management.

This initial work effort allowed the organisation to fully understand the issue at hand, the options available, and resources necessary to resolve the situation without risk of a lengthy and expensive excursion.

Although the short-term benefits of effective scoping and analysis are obvious, in the long-term, such activities help establish a cornerstone and common language for organisations to learn, adapt and grow, and promote a culture of BPM literacy—be it in a project or business-as-usual environment.

For 2014, we encourage our clients to work with PTA to pick up those seemingly random and jumbled activities, align them to your business unit or organisation's strategic objectives, and establish the signposts to follow (and those to ignore!) en route to successful resolutions.

You won't regret it.

iBPM—A MATTER OF PEOPLE AND MATURITY

Business process management (BPM) has long been recognised as a systematic approach to making an organisation’s workflow more effective, efficient and capable of adapting to an ever-changing environment. Recently, Gartner released the term iBPM—Intelligent Business Process Management—linking BPM to Intelligent Business Operations (IBO). Gartner describes IBO as the integration of analytics and management objectives into operational activities, to optimise business operations.

iBPM is about not only capturing and managing business processes, but automating and operationalising them to allow continuous monitoring, improvement and optimisation. Software companies are developing intelligent business process management systems (iBPMS) to support continual improvement, with new features including real-time analytics and deep complex-event processing (CEP).

These technological advances provide a variety of functions, which support iBPM. However, organisations are only able to benefit from these new capabilities when they reach an adequate level of maturity. For example, if an organisation has not yet captured or organised their processes, they will not be able to use any of the tools available to analyse and optimise them.

In order to best manage and eventually optimise their processes, companies need to first organise and evaluate the effectiveness and efficiency of their organisation. Many organisations make efforts to manage their business processes, with intentions for continual improvement. However, unless they have the proper foundations in place, it is impossible to achieve standardisation and improvement across the entire organisation.

The role of people in iBPM is paramount. Organisations rely on their employees and professional services consultants to:

- 1 Define and capture business processes
- 2 Achieve standardisation and consistency across an organisation
- 3 Analyse and identify improvements.

iBPM systems and other technologies are merely in place to support and enable people to drive improvements and innovation within an organisation. ‘Intelligent’ BPM can only be truly achieved when people are performing defined and managed processes at an increased maturity level.

How mature is your organisation?

PTA has worked with clients to measure their organisational maturity, using our maturity taxonomy framework (MTF). By applying our MTF, we can clearly identify areas for improvement and work with organisations to standardise their maturity measures and objectively assess methods and process.

PTA has authored a white paper on this topic, *Organisational Maturity—creating a common language*. If you would like a copy, please get in touch. See the back page for contact details.

Sources:

Stuart, Anne (2012). *Get smart: Explore intelligent operations and ‘iBPM’ suites*, ebizQ.net.
 Hill, Janelle B.; Jones, Teresa; Schulte, W. Roy; Sinur, Jim (2012). *Magic Quadrant for Intelligent Business Process Management Suites*, Gartner.

WHAT’S ON

15 March	Change Management Institute—Bridging the Distance—Leading Virtual Teams; Sydney
27 March	International Institute of Business Analysis—Requirements Management Tools; Sydney
30 March—2 April	Association of Change Management Professionals—Global conference; Orlando, Florida, USA
10—11 April	APQC Knowledge Management Conference; Houston, USA
5—7 May	CeBIT Australia 2014 Conference; Sydney Olympic Park, Sydney
14—15 May	AITD National Conference; Australian Technology Park, Sydney
19—20 May	Gartner Business Process Management Summit 2014; Sydney

Mind exercise 2

WORDSMITH CHALLENGE*



On each row place a letter that can be substituted for the centre letter of the words either side to form another word in each case. When completed, a five letter word will be read downwards.

What is it?

PAPER	GAMES
FLASH	DRINK
BOGUS	BEACH
PEAKS	PALES
ASPEN	OTTER

PTA happenings

BUSINESS WRITING SKILLS TRAINING

Two corporate organisations recently engaged PTA to develop and deliver Business Writing Skills training courses for their staff. PTA has worked to design a course that will equip employees with the skills required to deliver effective business communications within their organisations.

The PTA Business Writing Skills course covers a range of topics, including:

- applying technical writing principles
- editing and proof reading
- grammar and punctuation
- writing for your audience
- writing in plain English.

PTA tailors the Business Writing Skills course to each client's needs, by focusing on the types of documents their employees will need to produce. The different types of documents we assist clients with include:

- policies
- reports
- procedure documents
- requirements and specifications
- process maps
- systems documentation.

Contact us to find out more about our Business Writing Skills course and how we can tailor it to suit your organisation's needs.

Community

SLEEP AT THE 'G

Melbourne City Mission's annual Sleep at the 'G takes place on Thursday 22 May this year at the historic Melbourne Cricket Ground. It is Melbourne City Mission's most famous fundraising event to help combat homelessness in Victoria.

The money raised at this event goes towards a number of Melbourne City Mission initiatives, including Frontyard Youth Services, which won the 2013 Victorian Homelessness Achievement Award for Excellence in ending homelessness for young people. This ground breaking program offers a range of medical and accommodation services, counselling, parenting programs, life skills education, training and employment programs—all aimed at helping vulnerable young people turn their lives around.

Last year, Suzanne and Shannon were among the 1,500 people involved in fundraising for this event and in 2013, over \$305,000 was donated. This year, PTA is forming a team of employees to participate in the Sleep at the 'G. The goal this year is to raise \$500,000. It's a big challenge, so PTA is inviting each and every one of our team, our clients, friends and family to help Melbourne City Mission reach this tremendous goal.

For more details on the event, call Melbourne City Mission on 1300 364 507 or visit sleepattheg.gofundraise.com.au.

Analysis

BUSINESS RULES

Capturing, managing and analysing business processes are vital steps in achieving improvements and consistency across an organisation. Equally as important is defining the business rules which constrain and govern each process.

A business rule is defined as a specific, actionable direction that constrains the operation of a process in order to implement a policy. Different types of artefacts can be considered business rules, including:

- business processes
- business requirements
- controls
- policies
- roles.

By identifying the business rules applicable to a process, we can:

- allow for better knowledge capture
- manage risks and provide context
- minimise process variation
- simplify maintenance.

PTA works with clients to develop a business rules register, outlining a taxonomy of business rules relevant to an organisation or division. When documenting and analysing processes, we use the register to apply rules to each process, ensuring they align with overarching organisational policies, processes, controls and requirements, such as legislation and regulations.

Could your organisation benefit from a business rules register or process analysis? Talk to PTA—see the back page for contact details.

Mind Exercise Solutions

*sourced from www.mensa.org.uk

1. Minus 1/4 using plus, divide, minus and multiply. 2. Lunch.



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