EVALUATING BPM/RAD PLATFORMS FOR SHAREPOINT

PART 2: In-depth technical evaluation

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00 INTRODUCTION

SharePoint can empower an organization to face the rapidly changing business environment, provided it is equipped with a functional and flexible Business Process Management (more and more often classified as Rapid Application Delivery, or Development) platform (BPM/RAD).

Many vendors step up with identical claims, but the platforms are far from identical. Before making a final decision, it is crucial to verify the vendors' promises, as well as to probe all the veiled aspects of their offer to avoid disappointment in the long run.

In the first part of this e-book, we have discussed the methods to perform a quick-scan of BPM/RAD vendors and their offer, to narrow down the number of potential candidates for further evaluation. We pointed out the following:

- how to verify website content and get through the marketing jargon
- what good can come out from contacting the vendor directly
- how to obtain information that will never get published
- how to save time and effort on the evaluation process

The result of such shortlisting is a handful of quality solutions that can be considered capable of delivering business value specifically for your company. This part of the e-book will present how to take vendor evaluation to the next level and make sure the solution you consider will be up to the par on the technological level.

01 BEFORE YOU TAKE A STEP FURTHER: VENDOR PRESENTATION

Before you move to a serious technical evaluation, it is always worth to schedule a vendor presentation. Whether online or onsite, you will be able to see how the vendor demonstrates the product and what top selling points are highlighted. Additionally, such meeting is also a great opportunity to verify the vendor's approach to the presentation itself.

A Power Point presentation, regardless of its complexity, is just that – a presentation of would-be scenarios, wrapped up in an appealing message, as opposed to the much-recommended hands-on approach. In short, a fabulous Power Point presentation can be just a smoke screen for a poor-quality product.

Thus, before giving the solution a thumbs-up for further evaluation, we recommend you request a live demo of a prospect BPM/RAD tool. This is the moment to get a general overview of the product's interface and major features, which opens the door to further verification (vendor's advertising claims, and an in-depth evaluation).

And what exactly are the critical control points? Read on to learn all about it.

02 SAY "CHECK": THE ABILITY TO DELIVER

Once you have a "hunch" that the evaluated solution might be the one, take things to the next level. This will assure you that both the vendor and the solution are up to the challenge.

We recommend starting with a Proof of Concept that would test the vendor's ability to deliver a solution that fits like a glove, matching your specific business needs.

To do this properly, you need to prepare accordingly. Choose a handful of desired requirements to form a realistic, yet reasonably complicated scenario, and check if the prospect solution can deliver the expected business value. The entire POC project should be feasible within a total of 2 weeks, including the process of collecting requirements, answering vendor's additional questions, configuration, and the presentation itself. Most vendors will be willing to spend an estimated 6 to 24 hours on average of their consultant(s) workday to deliver the results.

SEEING A POC IN ACTION WILL ALLOW YOU TO:

- evaluate if and how the vendor delivers a scenario that mimics your individual needs
- see how flexible and usable the product is
- assess project communication with vendor.

Yes, this approach requires a fair amount of work on both sides. You need to prepare the requirements and to provide the vendor with all necessary information. The vendor's task, on the other hand, is to gather all data and deliver the solution. Nevertheless, the POC still proves to be the fastest of the reliable methods of evaluation, as it allows achieving tangible results quickly.

Please note that some vendors are unwilling to deliver a Proof of Concept for smaller prospect clients. In such cases, investing the vendor's time and effort in the POC might be disproportional compared to a potential revenue from licenses and services delivered. For this reason, it might be advisable to have an extra budget reserved for such an introductory project. Still, it would be much less expensive than investing in a product that fails to meet your requirements.

The second approach to verifying a vendor's ability to deliver is to test the prospect BPM/RAD platform during a live workshop. It is a complementary, or alternative, method to the POC, and an especially useful one from the point of view of a prospect power user. It is similar to the basic vendor presentation, except that the vendor is required to prepare a simple scenario ad hoc, and not use a pre-configured demo application.

Such approach will prove if the presented platform handles the creation of new applications easily, or is it just a ready-made, to which your company needs to adapt. During a live workshop, you can also see how the vendor carries out their projects, and if you can influence every stage of creating your desired BPM/RAD platform.

03 THE EASY SLIP: CHANGE MANAGEMENT

In a perfect world, once a business application is implemented, it would remain intact for years. The real life, however, shows that business processes tend to change very frequently (once a month on average) and the system you choose must be ready for it.

Hence, the investigative work is not over when the prospect BPM/RAD platform has proven itself by delivering a POC. Even if the solution looks promising, further investigation is needed; delivering an application is just the beginning, and there are still other phases of its use that the user needs to evaluate.

First, you need to recognize how the vendor solves the change management challenge. In most cases, it is simply enough to ask the vendor about it during a live demo or a POC presentation. Usually, the solution's approach to changes fits in one of the two following categories:

PROCESS VERSIONING

Whenever a business process is delivered and launched (i.e. its instances are running) each change of its definition will actually create a new version of this process. Hence, all instances that have already been started will finish with the original definition, and only those started after the change will be affected.

As a result, there might be multiple variations of the same process running at the same time. This can be difficult for the end user to understand, as they have to follow different procedures at the same time, depending on when the workflow was started. Additionally, this means extra work for the IT department to maintain all of the existing and running versions.

LIVE PROCESS MIGRATION

Whenever changes are made, they are introduced to the same process definition and available instantly. They apply to all running instances unless they are already finished or are past the point of change. As a result, only one process needs to be run and maintained; introduction of new procedures is possible on-the-fly.

In this case, IT departments need to be careful with introducing changes directly on the production environment, as this may disrupt the employees' daily work. Hence, a proper dev-test-prod migration mechanism is advised (read more in the next chapter).

The next step is to confront the prospect platform with the desired scenarios in your organization. Here, the benchmark is the frequency of change compared with business process scenarios, as outlined below:

- **Short-term processes** – each instance last up to 1-2 months maximum, hence both change management approaches (process versioning and live process migration) won't be affected

- **Long-term processes** – since they take long time to finish (more than 2 months), only live process migration would ensure flexible adaptability to the ongoing business process changes

- **Core processes** – whether they are short or long-term, the money-making processes must be flexible and the system has to be able to respond to any changes instantly. Otherwise the competitive edge might be lost.

- **Highly-regulated processes** – the parameters of the regulation-sensitive instances must not be changed at random under the threat of non-compliance and invalidity of the result. In this case process versioning is preferred.

Compared to hard-coding and custom solutions, all BPM/RAD platforms appear flexible and easy to change. However, the change management is the aspect that will affect the whole business application life cycle. Thus, it is crucial to investigate at the evaluation stage what kind of possibilities the solution offers in this area.

04 THE HUSH-HUSH TOPIC: DEV-TEST-PROD MIGRATION

If the vendor's prospect solution has passed the two previous tests successfully, now comes the time for a serious technological challenge – and one that is hardly ever discussed in vendors' advertising claims.

The bigger the scope of changes introduced in the already running business applications, the bigger the chance that something will go amiss. As a result, tinkering with the production environment with no guarantee that the modificationchange will work smoothly is not recommended. Hence the need to use development and test servers, to ensure the continuity of work.

The challenge comes with the migration phase, when data switch environments. If you plan to deliver at least some of the business applications by your IT department's own capacity, please remember to verify the following:

- Is there any automatic/semi-automatic mechanism to migrate changes between environments?
- If so, how much effort does it require and how long does it take on average to migrate the changes?
- Does it affect the already running instances (does it provide process versioning or live process migration)?

Even if the change migration process is automatic, we recommend verifying if there are any additional safety measures to prevent potential problems. First, is there is a mechanism of control provided over the changes in the system, to ensure that the configuration will not cause problems? Secondly, is it easy to revert the changes after the migration in case something went wrong anyway?

In case there is no automated migration mechanism, the process can be performed manually. However, as with any manual process, it is much more time-consuming and prone to human error. This is precisely why any buyer is advised to double-check this aspect, in order to avoid discouragement with a selected BPM/RAD platform.

05 ONE-ON-ONE WITH LIFE: MAINTENANCE & ONGOING USAGE

If the evaluated solution has proven itself in terms of delivery, change management and change migration, there are still plenty of things that will affect the level of satisfaction with the solution in the long run. For a painless system administration, make sure to check how the following features are resolved:

- **Audit trail** – verify if all the information on the workflow instances are stored as default, or if the audit trail needs to be delivered separately
- **Logging** – make sure the system logs every activity so you can easily review if your business applications are working properly
- **Troubleshooting** – for the system to work correctly, see if error messages are transparent and clearly indicate what needs fixing

- **Self-documentation** – since no one likes to write down the process documentation, a mechanism to create and update the documentation of delivered business applications may save a lot of time and effort.

Apart from the technical and formal aspects of using a BPM/RAD platform, you also need to ensure it meets the daily challenges related to both employees and their tasks:

- **Task delegation** – is the feature available at all? If yes, is it only manual, or can it be automated?
- **Mobile access** – can tasks be viewed and delivered via mobile devices? Is it just a mobile view of a SharePoint site, or a dedicated application? On which platform is it available?
- **Substitutions** – can you set up a substitution for an employee who is, e.g. on vacation? How the employee's tasks are assigned in the vacation period? Does the substitute take over only the ongoing tasks, or both the ongoing and new ones?
- **View of subordinates' tasks** – can the system take advantage of the Active Directory and display tasks of the manager's subordinates?

06 NOT A SPRINT, BUT A MARATHON: COMPREHENSIVENESS

Investment in a BPM/RAD platform is a long-term commitment. When selecting a suitable software, it is crucial to think about both the current needs, and those that may emerge in the future. If a platform turns out insufficient for a company's needs, the organization must choose a new vendor, along with all the consequences. These include not only the time-consuming processes of selection and implementation, but also the cost of separate, additional solutions (not to mention the cost of maintenance).

To ensure the BPM/RAD system is future-proof, keep in mind that it should be able to deliver a wide range of business processes, including:

- **Classic processes** – e.g. vacation request, cost approval, purchase order, business trip, etc.; these are usually deliverable on most platforms.
- **Supportive processes** – e.g. helpdesk, change request, Active Directory and Exchange management. Usually feasible, but in many cases onerous, so organizations are not too keen on implementing them.
- **Core processes** – e.g. the processes that are critical for your business. Only a few vendors will be able to deliver in this aspect, as core processes tend to be complex and require a very high degree of adjustment to a company's individual needs.

07 LOVE IT OR HATE IT: USER ADOPTION

Your prospect BPM/RAD platform might be a state-of-the-art technology, but will turn out virtually useless, if it is not user-friendly. Unless intuitive, fast and, frankly speaking, visually appealing, your platform won't be used, and your money will go down the drain.

To make sure your end users will love the prospect solution, consider the following:

HOW LONG DOES IT TAKE TO TRAIN THE USERS?

- If a company needs to train a dozen users, this is a minor investment. But can you really train 20 000 employees? The user interface needs to be intuitive and self-explanatory.

HOW MUCH DOES IT TAKE TO ENABLE MOBILE ACCESS?

- Many solutions available on the market will require significant effort to make business applications mobile-ready. Choose the one that will handle it within minutes.

IS WORKING WITH FILES AVAILABLE AND EASY ENOUGH?

- See if the solution allows generation of files based on corporate templates, converting them to different formats, signing them digitally, attaching to e-mails, etc. - and all without the need to downloading to a hard drive.

IS ALL INFORMATION AND DATA EASILY ACCESSIBLE?

- See if all relevant information (metadata, files, and emails) can be gathered in a single place. This is especially important when an employee goes on vacation and a substitute takes over their tasks. Having all crucial data displayed on a single screen will be a great help.

ARE THERE ANY UX ENHANCERS?

- Any additional features that will help employees with their daily tasks will be a significant factor in the user adoption process. Neat reports, as well as Word, Outlook and Excel integration, will definitely come handy.

EPILOGUE: KEY TAKEAWAYS FOR DIGITAL TRANSFORMATION

According to Gartner, by 2019 as many as 83 percent of companies will base their business models on technology, and they will need to invest in digitalization, simply to stay relevant in the market.

But choosing a suitable BPM/RAD tool is by no means a task to be handled lightly. Apart from the cost incurred, the risk involves organizational chaos and employee dissatisfaction that ultimately affects productivity.

Our e-book provides you with a list of 10 concrete steps to take before purchasing a BPM/RAD platform, to prevent it from becoming a bottleneck in the future.

COMPREHENSIVE EVALUATION OF A PROSPECT BPM/RAD PLATFORM:

1. Website research
2. Direct contact with vendor
3. Direct contact with existing clients
4. Hiring an advisory company
5. Vendor presentation
6. Checking the ability to deliver company-specific solutions
7. Checking change management
8. Checking dev-test-prod migration
9. Checking maintenance and ongoing usage
10. Checking user adoption

The first four steps comprise a quick-scan method for a cursory research, and the other six serve the purpose of an in-depth technical evaluation.

ALL IS WELL THAT ENDS WELL

There is no doubt that the time and effort invested in such a detailed evaluation of a BPM/RAD solution will pay off. The choice you make will influence the future of your IT department, and its capability of delivering business applications, to quickly respond to the ever-changing business requirements.

On the other hand, with a well-chosen platform, the procurement process is done only once. This means no additional research, meetings, demos, negotiations, paperwork, implementations, integrations, training and contacting a number of vendors in case of a problem. You end up with a single platform that covers a wide range of business needs.

Additionally, with a tailor-made BPM/RAD solution you don't need hard coding; this means no more "black boxes," and reduces the need for a programming work to minimum. The solution itself is flexible and easy to maintain.

Organizations, which chose to apply the above discussed BPM/RAD selection principles can discover the previously dormant potential of SharePoint and identify new areas for improvement. And with a workplace environment suited for responding to company-specific, business-critical requirements, organizations can keep ahead of their peers and reap the benefits of the Fourth Industrial Evolution.

THANK YOU FOR READING OUR E-BOOK.

We hope you found the publication informative and useful in making the right choice concerning your future BPM/RAD platform.

For more advice and inspiration on how to digitalize your organization, visit our website www.webcon.com

And should you have any questions, or need specific advice, just contact us at: office@webcon.com

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