



## OVERVIEW

# The Role of the Business Process Analyst in Workflow Deployment

## PREFACE

For the past 20 years businesses have been focused on Continuous Quality Improvement (CQI), Business Process Re-engineering (BPR) and other business science studies addressed at improving quality and effectiveness within the organization.

The fundamentals of any business process improvement revolve around improved and more effective communication, distribution of information and application of corporate business rules for improved business decision communication, management, escalation and advancement. Control management systems (weekly operating reports, time reports) and business rules (who is responsible, when is it due by) are the baseline components underlying business process improvement.

When the control systems are available electronically and combined with business rules to harden the process for movement within (or external) to an organization, electronic workflow scenarios are created.

## UNITING ELECTRONIC SYSTEMS WITH BUSINESS RULES TO CREATE WORKFLOW

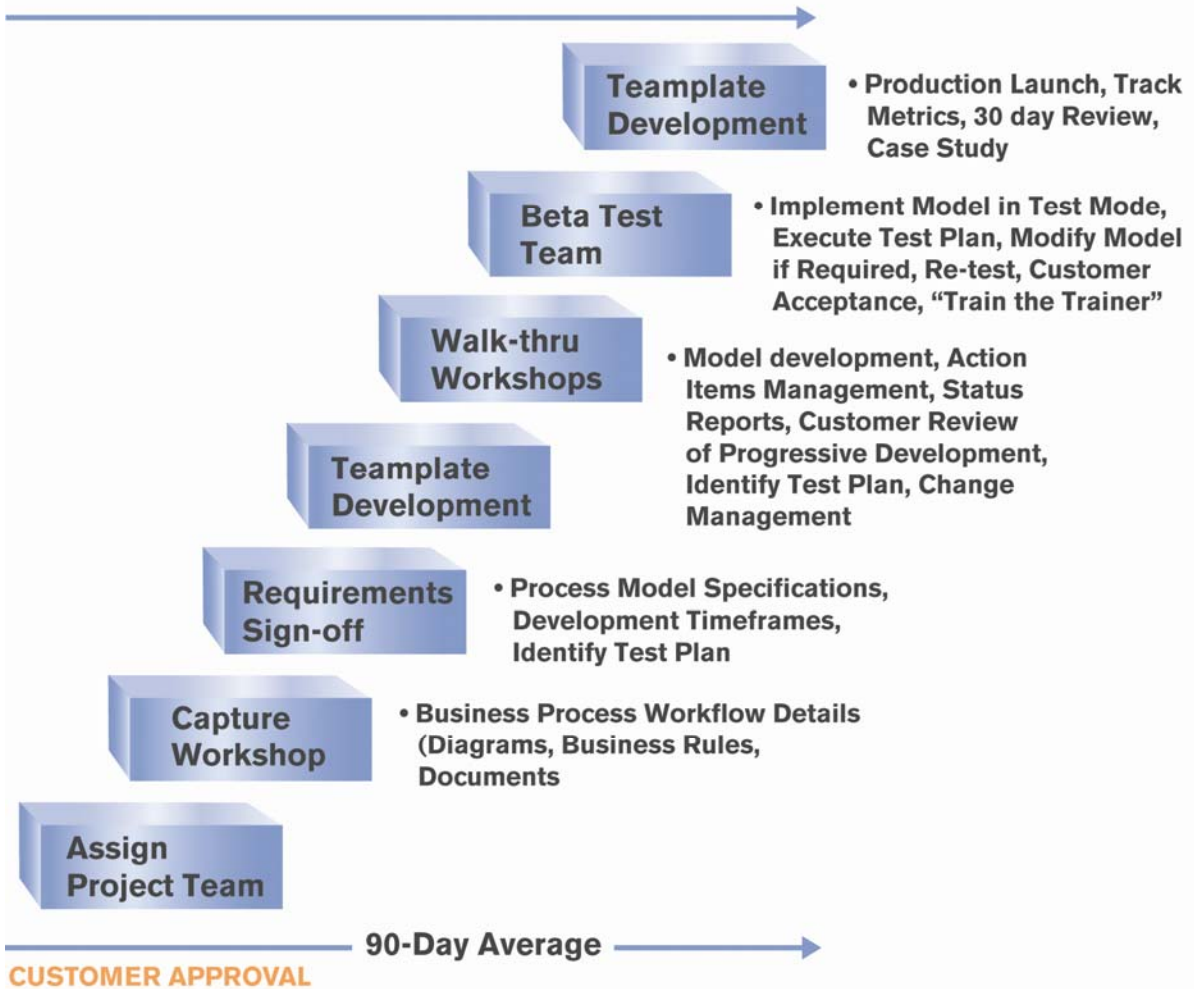
Many organizations see the value of automating business processes and are realizing increased control and compliance within the organization. The cost and time savings that result from eliminating dual entry in repetitive business cycles through automation are substantial.

However, the deployment of automated workflow over the past 15 years has hit a fundamental barrier. The control systems have been made electronic and are managed by IT departments. These control systems may include accounting systems, Web based forms, ERP and CRM systems. All these systems are data repositories. In the past 15 years, business has become accustomed to using these systems and has invested heavily in information data control. However, the timing and rules for who has access, changes and advances the status of the information still resides with the business users of this information – and it is still held in the minds and customs of the people running the daily business functions. The knowledge worker understands how much time it takes and who is responsible for completing the data inputs and decision making around each field contained within these control systems.

Therefore, workflow deployment is partly managed by IT but very dependent upon the intellectual property of the users regarding who does what and when. There must be a collaborative effort between these two teams to effectively deploy workflow and to gain adoption and utilization by the end-user to participate in the workflow cycle. To be successful, workflow must be developed in cooperation with the end-user and must be defined with a clear understanding of how the end-user functions daily. It also must include a business process analysis of whether their daily cycles are effective. From this understanding the workflow map can be created.

Conversely, workflow maps created by the business users should not be deployed without corporate policy approval and quality testing by the corporation and the IT department. Where workflows are defined by the business user and involve other individuals, teams, departments, suppliers or vendors, it is imperative that the business management review and ensure that the workflow enhances effectiveness and does not disrupt the business cycle. It is for this reason that the Business Analyst is key to serving as the IT, business and corporate gatekeeper to the effective design, development and deployment of automated workflow.

## IMPLEMENTATION TIMELINE



## THE MODEL, BUILD AND DEPLOY PHASES OF WORKFLOW

### Modeling - Defining the Workflow Map

The Business Process Analyst plays a very significant role in collecting requirements, business rules and systems requirements to map the workflow for review by the business and IT teams. This is the Analysis Phase of Modeling Workflow. It consists of discovery meetings with business users to define the goals and deliverables from automating workflow deployment. It then moves into the granular details of mapping the process, defining ownership and collecting the associated documentation, forms, contents and business rules to be managed through the business process cycle.

### Building - Technical Development using the Workflow Tool

With the workflow having been defined, the Business Analyst works collaboratively with the IT development team to create the electronic workflow. Weekly meetings are held to review development efforts with the business teams as missed elements at the start of a workflow have a domino impact effect for changes later in the workflow. In other words, it takes more development effort to rework an entire process than to check at each task stage to ensure all elements, players and rules are properly defined and incorporated.

## Deploying - Testing and Gaining Full Deployment Adoption

Because the Business Analyst has kept the IT development and business users engaged through the Modeling and Building phases, most key users will have had input to map a process that in reality reflects their daily working functions. In addition, because they have participated through the design cycle they will be very familiar with "their" workflow tool. As a result of this participation, testing and adoption participation is more effective and done with less training/re-training as users have been exposed to the system and understand how it fits to the requirements of their business activities.

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