



The ultimate buyer's guide to BPM software



Introduction

New software evaluations are time-consuming, expensive, and stressful. But owing to the rapid technological advancement and external changes, you have to wonder if you are missing out on something. Is the legacy tool you have been using for the last seven years still relevant? Is the SaaS product you signed up for three years ago ever going to be updated? Will your current provider be able to take you into the next decade?

When it comes to BPM systems, the market is saturated and unnavigable. If you are an enterprise, you would probably be raising questions like should you stick with a robust, full-featured legacy tool, or can you do just as well with a SaaS product? Is an open-source product going to save a lot of money?

In this BPM Buyer's Guide, we give you the straight talk you need to make the best choice. We'll include a few tips throughout the guide on how to find a partner that you can rely on for the long haul.

When it comes to finding the right BPM solution, it all comes down to comprehensive, non-negotiable features and the ability to scale with your BPM tool. If your current BPM solution doesn't hit all 10 of these features (plus a bonus tip at the end!), it's time to make a switch.

01



A Human-Centric Process Builder

The core feature of any BPM tool is how it diagrams workflows and processes. The entire idea of BPM is being able to create and edit a process in such a way that a system can follow along. However, diagramming tools have changed a lot in the last several years.

Here are the five major types of interfaces you might encounter when selecting a BPM tool.

01

Coding

This was the only option in most of the original BPM software. A programmer would need to go in and manually write all the code needed to map out the workflow. He would need to create each task individually, and tell the system what should happen in every situation (if it is approved, rejected, etc). Coding is still an option for some business process management tools. It provides the highest amount of flexibility because you can build the process completely from scratch.

However, only people who know the programming language can create and modify the process. Process owners have to rely on the programmer to make the process function properly, and they will need to go back to him/her frequently for even the smallest changes.

02

Data Entry

At some point, BPM tools began offering an interface that used forms to ask users standard questions about how they wanted the process set up. This was a huge leap because now non-technical users could create their own processes.

However, the data-entry model is the least flexible. Users cannot go beyond what is available on the form and are very limited on how they can build workflows

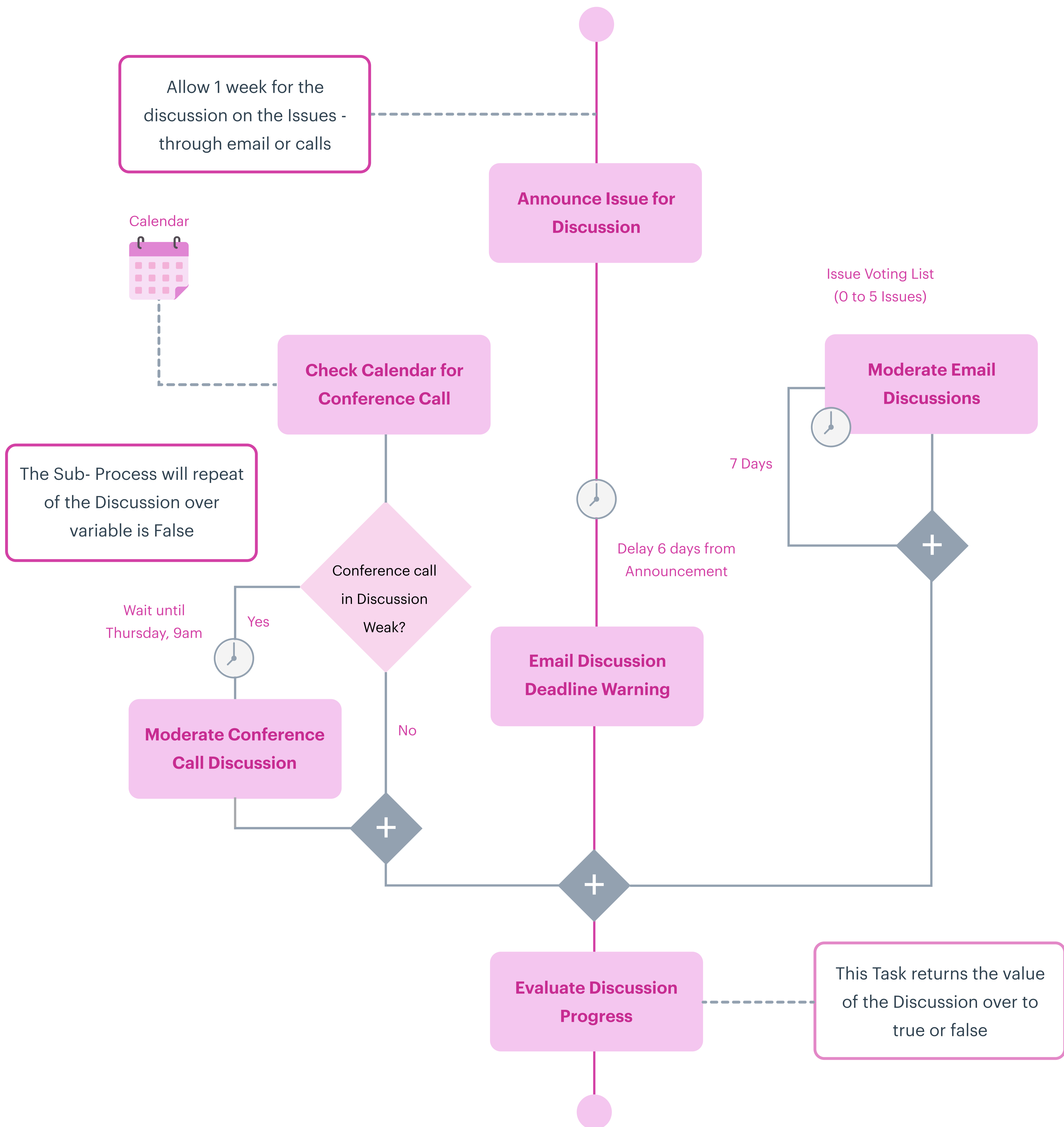
03

Visual designer based on activities

Many modern BPM options use this designer since it is a good bridge between the business user and the programmer. Most of these options make use of the business process model and notation (BPMN). This is a consistent graphical representation to specify a business process. Rather than using a programming language or text fields, the user can graphically see what a process looks like.

These designers allow a user to create events and activities as a part of the workflow. Once an activity takes place, the user can then choose what happens. Some activities performed by a machine (like a data transfer) will sequentially and automatically lead to the next activity. At other activities (sometimes called gateways), multiple actions might take place.

For example: If it is an approval step, the path will diverge if the answer is yes or no. These process builders are quite robust in terms of functionality. In the end, you can create something that looks like this..

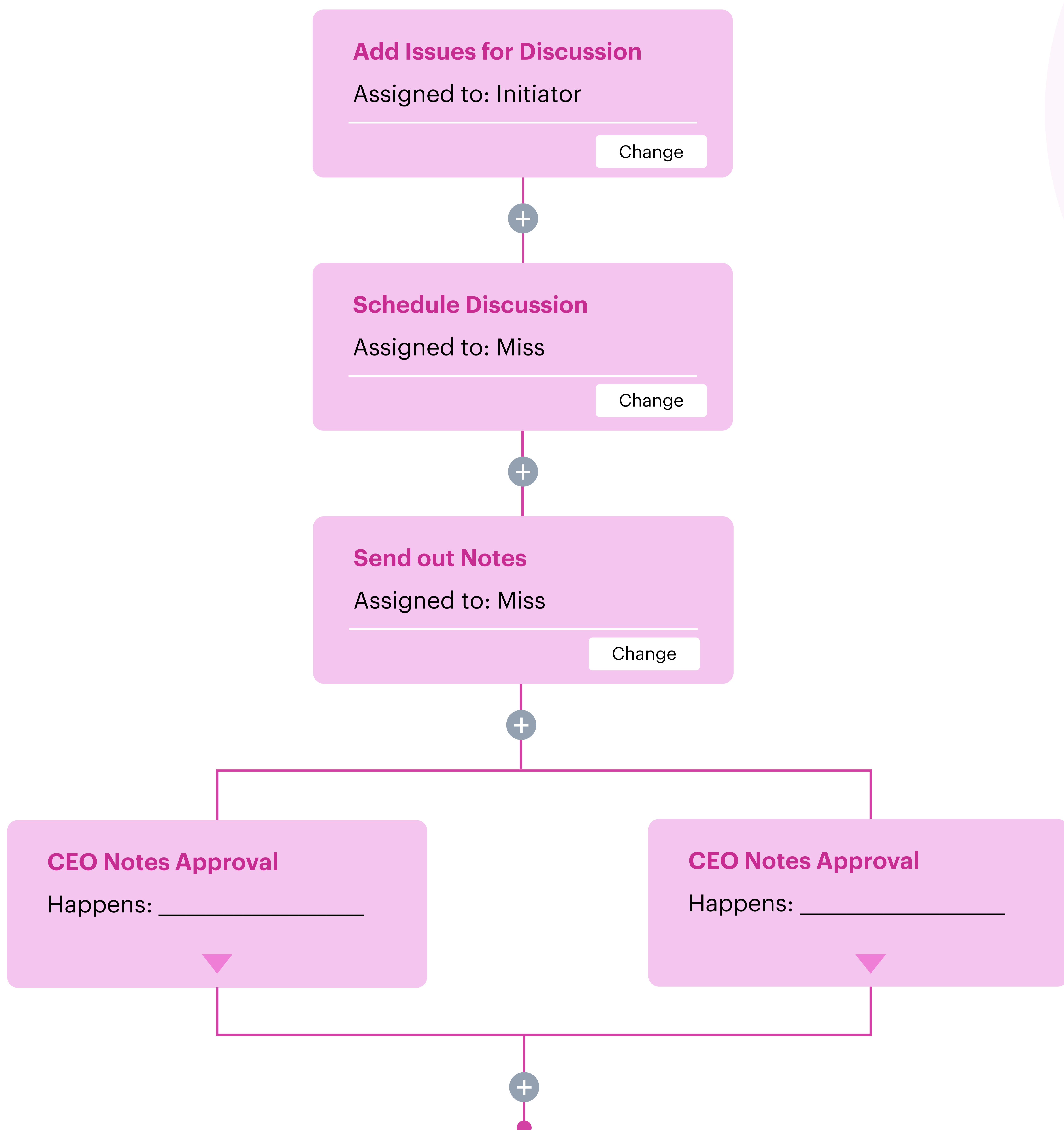


04 Visual designer based on business steps

The visual design was still a compromise between the human business user and the machine. The user must learn the proper notation and think through every possibility that might take place after an action is finished. But most business users don't think like that. They think in terms of business steps → Step 1, Step 2, Step 3, done.

A visual designer that is based on business steps starts from the user's point of view without delving into what the software needs to consider. The user can create a process that represents how it should be functioning as intended.

For example : The below diagram might look like this:



This model makes much more immediate sense for the user. The key difference is that the system takes care of all the additional work that showed up in the earlier notation.

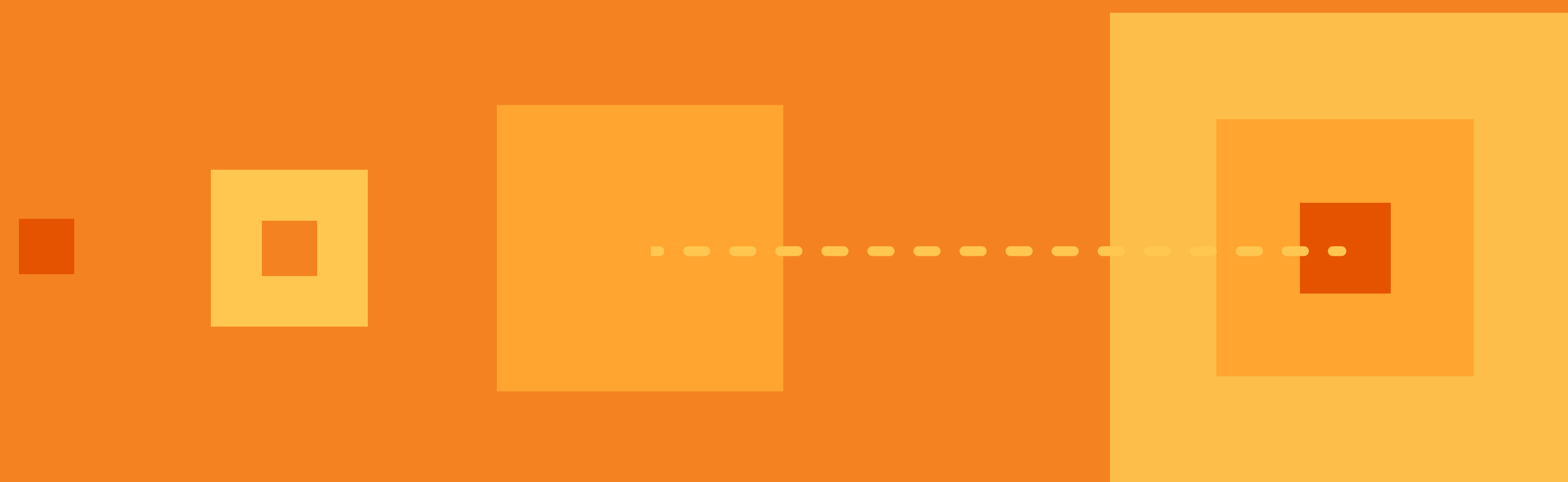
For example: should the CEO reject the notes from the discussion, he can send it back to any earlier step, and the system takes care of it.

05 No-Code

The No-code BPM tool is a game-changer in the BPM world. It facilitates process owners and business managers with a self-service workflow tool, empowering the business users to automate processes with speed, agility, and flexibility.

This is contradictory to the traditional BPM tools, which require IT Pro assistance and significant investments in both time and money. In a no-code BPM platform, anyone can add and edit fields, tasks, and logic by dragging and dropping. Business users can create the process of their dreams with no technical help, and no debugging.

2022



Drag & Drop Form Creator

It's hard to find a new BPM tool in the market that doesn't claim a 'Drag and Drop' interface. Even beyond BPM software, cloud-based tools all over the world have nearly all gone to an exclusive drag and drop functionality. Users love it, and it makes designer's jobs easier when it comes to giving you the options you need.

Within BPM, form design is very important. Users need access to multiple types of fields at a glance and need to be able to make quick changes within the form, both in the creation stage and while editing.

However, just because some software claims to be drag and drop, does that automatically guarantee a good UI/UX?

Let's take a closer look.



What makes a good drag & drop interface

Drag and drop is ahead of the curve because of the ease and customization it offers. However, just because a form is created with a drag and drop interface doesn't make it useful. A good form designer should help you create an easy-to-follow, intuitive form.

It should empower users to explore all the possibilities quickly and understand the context at a glance. Within a form designer, you should be able to move items around in such a way as to improve the user experience. The best drag and drop designers include the ability to create sections and tables to help segment your form and create easier data entry points.

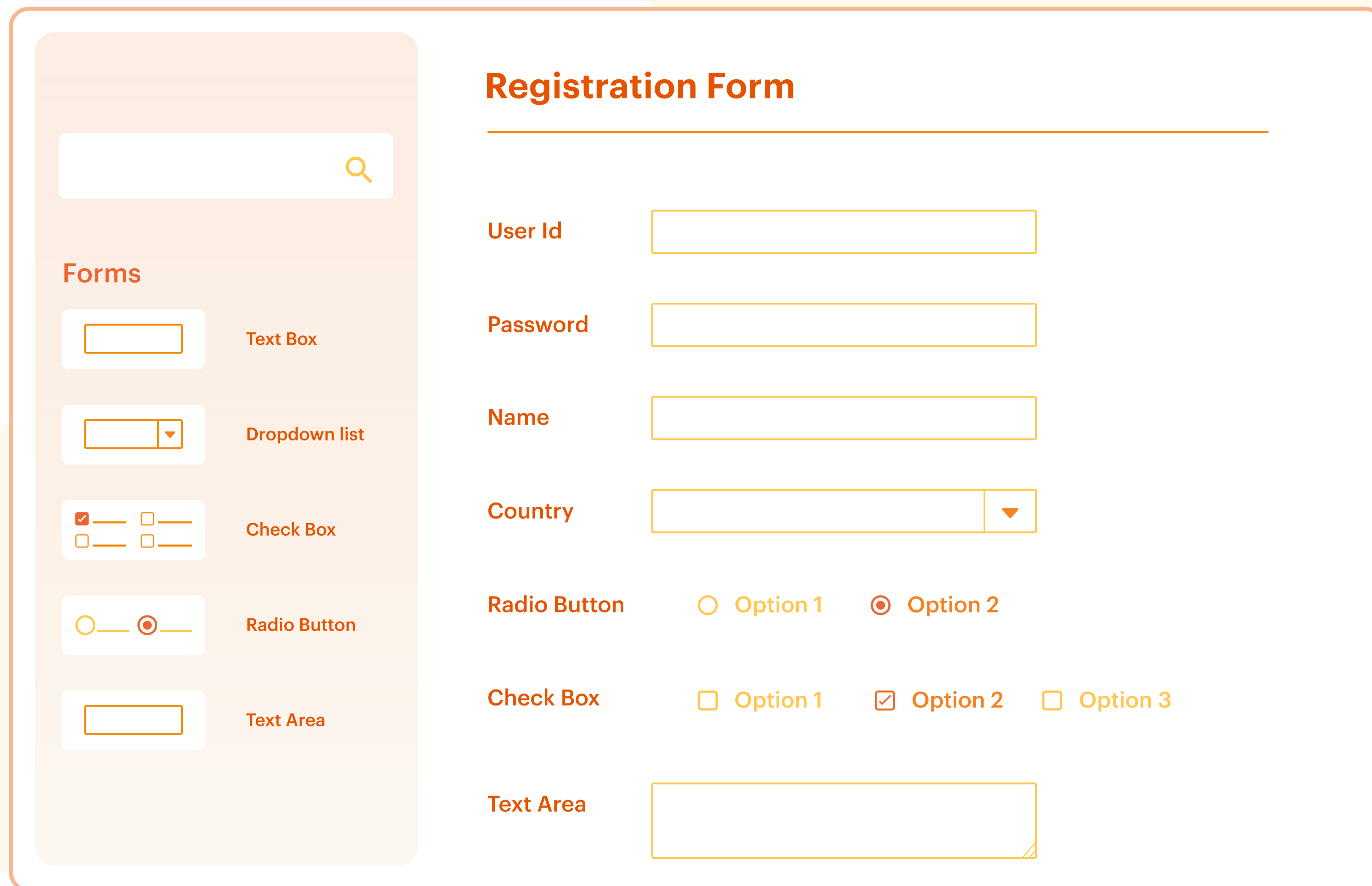
Don't forget the fields

Don't assume that every drag and drop form designer has the fields that are important to you. Many business users have been excited to implement a new BPM solution only to find out that the software they chose doesn't offer the kind of form functionality they need.

Here's a list of several types of fields the best business process management tools offer:

- Text, number, and currency
- Yes/No questions
- Calendar fields with date and time
- Dropdown menus
- Checklists
- Attachment (with easy access to documents stored on your cloud system)
- Rich text areas to display static information, images, or video

- A user field to select from a list of users who can be dynamically assigned a task in the workflow
- A field to immediately refer to stored editable data sitting on a master set (i.e. product lists, vendor information, employee information)
- Signature field to capture electronic consent



The image shows a drag-and-drop form creator interface. On the left is a sidebar titled 'Forms' containing a search bar and five form components: Text Box, Dropdown list, Check Box, Radio Button, and Text Area. On the right is a 'Registration Form' with the following fields: User Id (Text Box), Password (Text Box), Name (Text Box), Country (Dropdown list), Radio Button (with Option 1 and Option 2), Check Box (with Option 1, Option 2, and Option 3), and Text Area.

Do more with advanced fields

When it comes to the field, you will need more than just data entry. You should be able to add formulae, if/then expressions, or additional logic to make your form smarter and intuitive. Your fields should be able to integrate with each other and gather additional data to limit the possibility of human error.

Don't settle for ordinary

Make sure to not saddle yourself with a simplified form designer that you will quickly grow out of. You don't want to reach a point where you are faced with the decision to either transfer all of your processes to a new system or continue to limp around with the old one.

One of the best ways to evaluate the longevity of a form designer is to examine the last time they updated the UI/UX and when they last added a new type of field. As technology marches onward, new field types and functionality will emerge. You want your BPM system to be at the front of that march, not bringing up the rear.

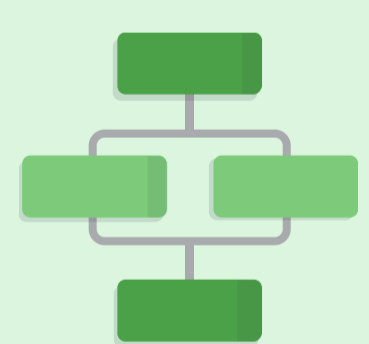
Playing around with the form designer for a variety of different processes is key to finding a solution you can grow with.

03

Role-Based Access Control

Access control is a powerful feature that you may discover too late when exploring a BPM solution. Workflows have lots of data, and not all of it is meant for everyone to see. However, many business users assume that access control is a feature that comes with any BPM software. Sadly, that's not the case.

Here are some types of access you may need to think of



Access To Edit The Process

Each process has an administrator, but who else is authorized to go in and make changes? Does your BPM tool let you see who made what changes at what time? Can your process administrator make changes in the middle of a process? Do you want her to be able to edit information midstream? How transparent and comprehensive is your documentation for each item?



Access To Reports

Your BPM tool should allow you to define who has access to see the metrics of how a process is going and who can see a bird's-eye view of all completed and in-progress tasks.



Static vs. Data-Based Permissions

Some data fields should always be hidden on certain tasks. However, you may have some fields that you want to show or hide based on data entered earlier. The best BPM software should allow you to perform this dynamically.



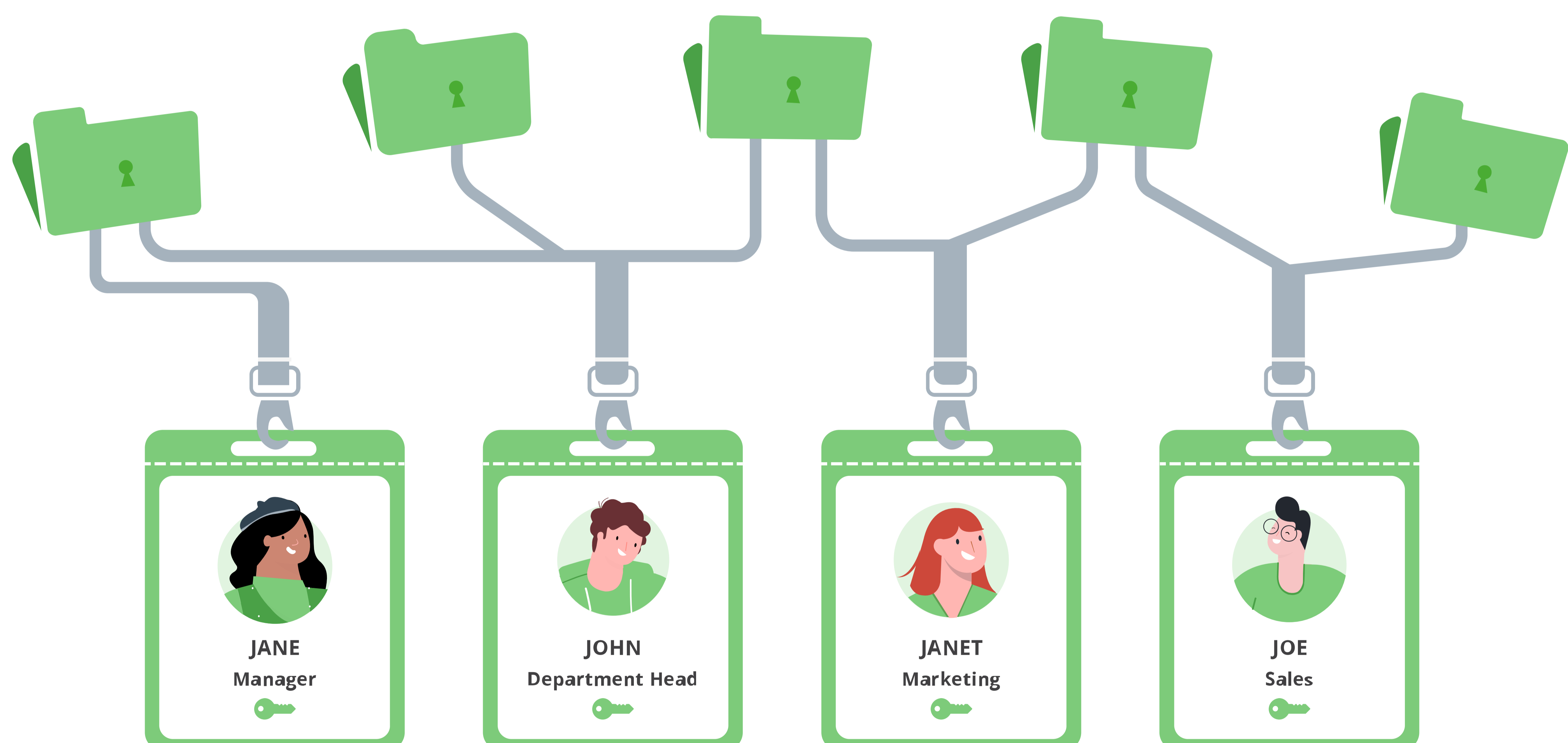


Editing Data During The Workflow

When the form comes up for a task owner, the process admin should have three of the following options for each data field:

- Make a field editable for the task owner
- Make a field read-only
- Hide a field entirely

This way, the process admin will be able to control exactly what is seen at each task to maintain privacy and accountability.



6 Specific scenarios

Here are some scenarios that business users find themselves stuck in after choosing a BPM tool that doesn't offer secured control over data access.



Leave Application Process

Armando only wants 'Reason for Leave' to be seen by each person's manager and not by HR later on in the process.



Meeting Agenda Process

Laura wants anyone from her leadership team to be able to approve an agenda item, but the leadership team is in flux and she doesn't want to manually change the process each time.



Budget Approval Process

Sergey wants to give editable access to certain fields to everyone's reporting manager.



New Hire Process

Marquita wants to hide compensation information from the website team when they publish the job listing.



Employee Onboarding process

Ken wants to automatically skip a step that sends out a mass email if the employee has requested that certain information not be made public.



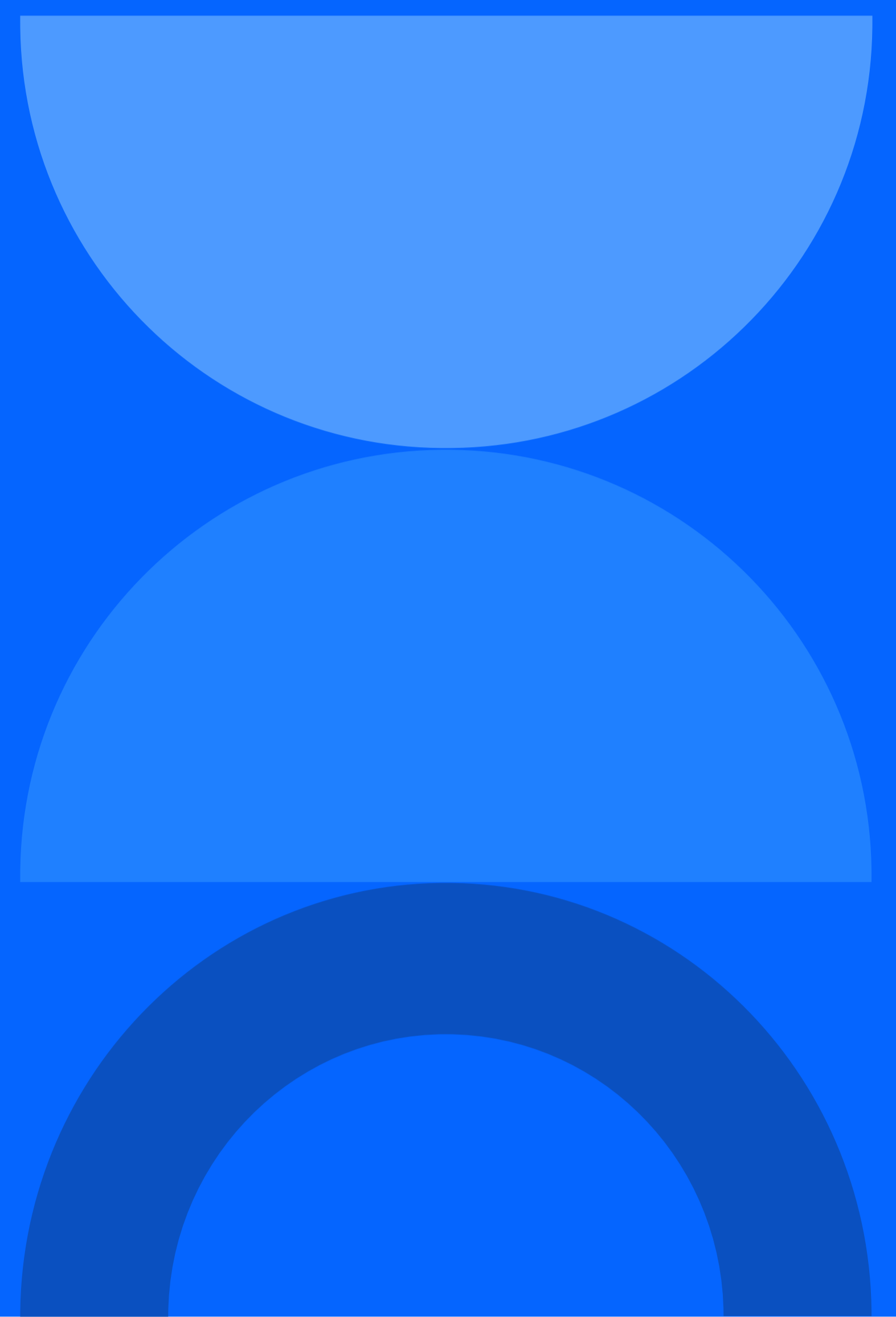
Vendor Payment process

Caroline wants specific line items to display for Accounts Receivable only if the initiator indicates so with a slider.

Make sure to choose an all-inclusive BMP tool that is already ahead of the curve when it comes to access control. This can be a make-or-break feature and if you are skeptical about a provider's ability to handle it now, it likely won't get better later.

04

Mobile Support



Name any business processes you could think of, it is guaranteed to have a mobile version. From email to customer service to travel expenses, it seems like everything is going mobile.

But what about BPM? Isn't that a little too core-business to demand that it be able to function on a mobile device as well?

Cost efficiency and return on investment (ROI) from mobile BPM suites is driving the growth of the mobile BPM market in the next five years.

— MarketsandMarkets

The future is mobile

If the BPM software you are evaluating does not have mobile support for at least Android and iOS, you should walk away immediately. It's not something that will take you into the next decade. The future of all businesses is mobile, and BPM has already started taking strides in that direction.

The era of the mobile workplace has already begun and especially ever since the COVID pandemic hit the world, it is now moving at warp speed. It is reported that in 2025, the number of mobile users worldwide would reach **7.49 billion**.

With BPM software on a mobile version, you can easily imagine all of the core business taking place on the go, on the cloud, and the phone.

If the BPM system you are looking at doesn't currently offer mobile support, don't plan on them turning the ship anytime soon. And if they do, it will likely be a very difficult transition. On the other hand, if you choose BPM software that already has a robust mobile option, it's likely to just get better over time.

Mobile platform to consider

When shortlisting a BPM for your enterprise purchase, you need to take account of the platform compatibility it offers. iOS, for instance, is ubiquitous in the US market; however, emerging countries like Brazil, China, and India are more reliant on the Android ecosystem.

As of 2019, Android had an 87% share of the global smartphone market and this is anticipated to only increase over the forthcoming years. Apple (iOS) on the other hand, has a 13% market share. Businesses with global branches should choose a BPM system that offers compatibility across all leading mobile platforms to ensure hassle-free integration and team collaboration.

Mobile-first an option, not an obligation

A mobile-first application is primarily meant for mobile devices and may or may not also provide web-browser-based options. For BPM, a mobile-first approach works great for users on the move. You want people to be able to see the information and act on it as quickly as possible.

However, when it comes to process creation, form design, reporting, and many other features, you will need something that thinks beyond mobile.

Since manufacturing and IT businesses have many complex components to their operations, they can opt for BPM solutions to create a great mobile experience, but only as an extension for their core desktop services.

A mobile-first BPM software might not offer extensive integration with other systems in an enterprise or might offer simplistic functionalities that do not match an enterprise's complexities.

On the other hand, incorporating mobile intelligence into their processes empowers managers to accomplish tasks on the move and ensures business longevity. In short, the best solution is one that is highly feature-rich and intelligent that also provides an amazing mobile experience for users.

Empower mobile users

BPM tools that support mobile devices should not only allow users to perform all of the basic functions, but also allow them to view, prioritize, execute, approve, withdraw, and track any item they have participated in for a given process. In addition, the best BPM software will allow individuals to have administrative abilities over individual processes.

They should be able to reassign tasks, delegate responsibilities, and delete items from the airport before they have to worry about logging into a system. Stakeholders are not bound by time and place to access their tasks on mobile. They can control the processes on the go, eliminating the chance of bottlenecks and office-bound approvals.

When it comes to finding the best business process management tool, your search should end if the BPM software doesn't offer mobile support for users. Make this a non-negotiable and keep your company ahead of the technology curve.

05 Powerful Administration Capabilities



Fundamental to any great software implementation in a company is the champion, the expert, the go-to girl, the admin. However, if your BPM software limits the powers of your admin, or makes it so complex that an average business user can't make sense of it, it's useless.

You are either stuck with expensive consultants or waiting forever for support tickets to close.

System Administrator's hold the key to the city. They can make or break your project. They can be your worst nightmare or your holy guardian angel...

— Adam Deane, @adam_deane

Admin capabilities keep the ball rolling

Software designers often like to restrict giving too much power to system admins because they know that the more you fiddle with things, the easier they are to break. However, a fragile system is a problem of its own, and you need to have in-house people who can fix simple problems when they go wrong.

Giving power to the admin guarantees two things:

- Admins take the accountability of the process
- Admins ensure the continuity of tasks and data security

A watertight admin console can offer these opportunities to allow the first line of defence to be at home rather than a call to support.

Admin roles in BPMS

Every piece of software you use generally has an admin role. This person manages the global preferences, user management, billing, and integrations. However, because BPM is by nature a creative process for the user, there are certain roles traditionally given to the admin that don't make sense.

For example, the person who designs a purchase order process may be a functional financial manager. He should be able to edit items midstream, delete any item started by anyone, make changes to the overall process, create reports, and adjust the default notification.

However, if the IT director is the only admin on the account, many BPM tools give all these powers to only the IT director. The best solution is to have a System Administrator role and then many Process Administrator roles. The System Administrator continues to take care of user management and billing, but the Process Administrator has access to all the additional functions mentioned.

What features should a system admin have?

As you are trying to find the best business process management software, take note of these administrative features that your system administrator should have:

- Create and edit user groups
- Manage user access requests
- Manage web services (webhooks and APIs)
- Billing and adding additional licenses
- Setting the global preferences for currencies and time format

What features should a process admin have?

As you are trying to find the best business process management software, take note of these administrative features that your system administrator should have:

- Create and edit forms and workflows for a process
- Restrict and grant access to processes
- Change permissions for data viewing and editing
- Create and edit master data sets that exist outside the process
- Reassign tasks for any item
- Permanently or temporarily delegate tasks to a new task owner
- Suspend the process temporarily
- Export data from the process
- Create reports from process data
- Delete the process
- Customize the email or push notifications
- Delete individual items
- Edit items in the middle of a process
- Skip out on the consulting fees and long support wait times. Make sure the BPM tool you use grants these superpowers to your admin before you purchase it.

06



Single Sign-ON

Single Sign-On (SSO) capability in software allows individual users to use a single set of login credentials to access information across various resources in an enterprise network. SSO is a powerful backend function that provides a seamless frontend experience for the users. From the IT standpoint, SSO is a must for any business process management tool. Your IT director works hard to ensure that you have a smooth SSO experience to ensure data security and ease of managing user access.

For end-users, SSO eliminates the frustration of keying in unique credentials every time they log into a portal and their dependency on IT if they get locked out. Business process management tools with SSO capability can easily integrate into an enterprise ecosystem, allowing users to utilize its services with a single click of a button.

IT directors believe in SSO

You may think that SSO is not indispensable when it comes to BPM features, but consider it from the IT director's viewpoint.

Imagine your entire company is going to an amusement park, and the IT director is in charge of tickets. With SSO, the IT director can give a blanket entry pass to everyone so they can get on any ride they want in the park. Without SSO, the IT director has to track and get individual tickets for the roller coaster, the water slide, and every other attraction.

SSO is integral to an enterprise's user access management because it solves major security and access issues. The SSO capability for a business process management system validates the username and password of the user with an account at a different domain (e.g., Google) to allow access to the system.

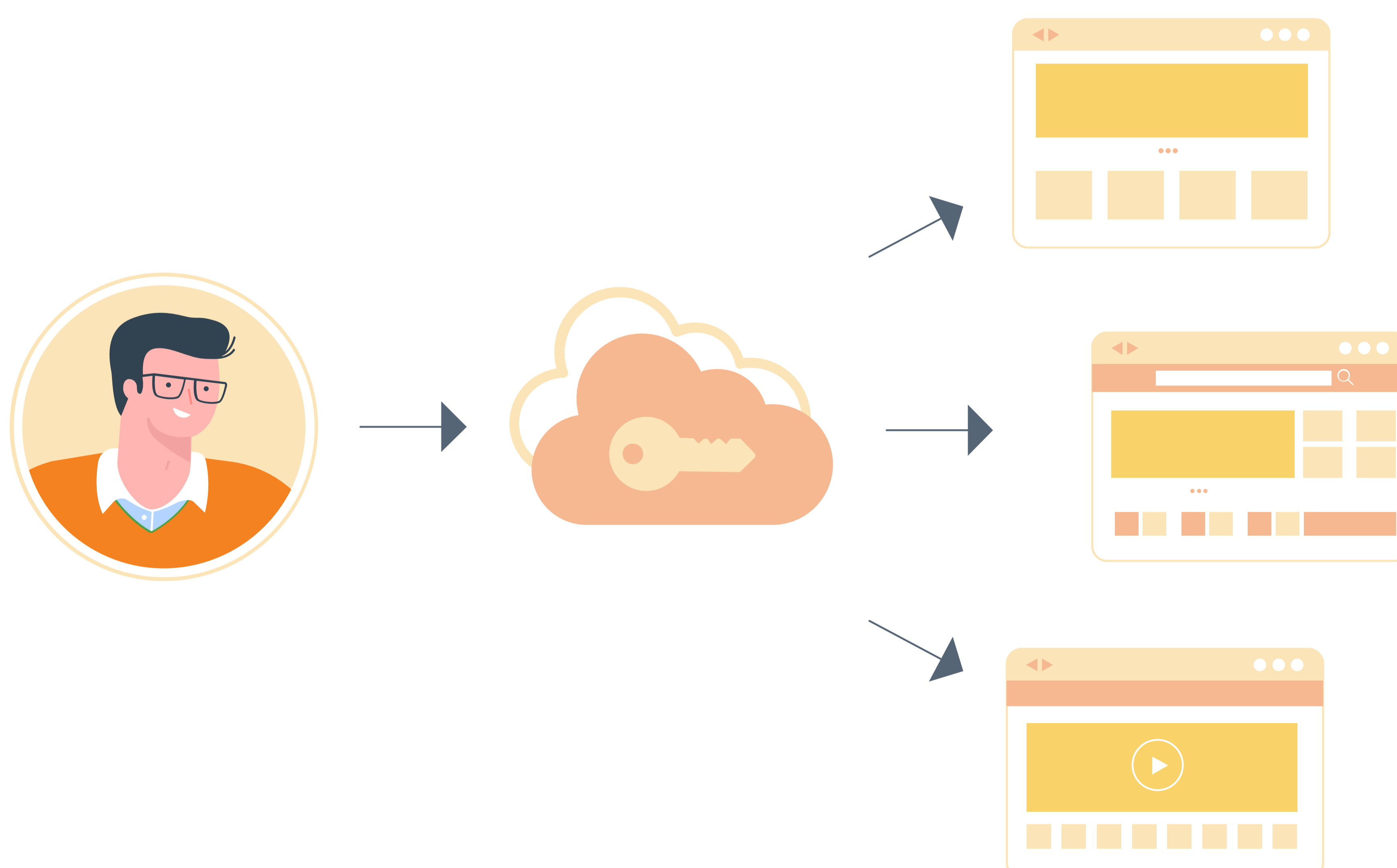
In the context of a business process management solution, the SSO redirects the user to the default page of the BPM suite once the authentication is established.

Using the same username and password for every platform makes users highly prone to data theft and creates a security risk for the IT director. SSO, in contrast, makes use of multi-factor security approaches like verifying an authentication token to allow users into a system.

Singular signing, multiple options

A business process management system may come with one or multiple SSO implementation options; it's up to your IT department to determine which fits best for managing your enterprise's access management. A rule of thumb is to ensure that the implementation allows users to uniformly access cloud-based and on-premise resources, based on their original user rights.

When a BPM suite offers hassle-free SSO capabilities, your enterprise IT doesn't have to worry about user provisioning and identity management for all applications at each instance. Likewise, users without access to your existing set of applications are automatically bounced off from the BPM software.



Pick what works best for your enterprise

When shortlisting a BPM system with SSO functionalities, you have a few easy options that are based on the diversity of applications your enterprise runs on. Depending on your company's application preference or its size, your enterprise can fall into any of these three categories:

01

If your company uses G Suite - like many companies do - choose a BPM that comes pre-integrated with SSO capabilities for Google accounts. Google uses OAuth 2.0 for providing secure access to users without displaying their passwords.

02

The second-largest group of enterprises banks on Office 365 as an alternative to Google Apps. Many business process management tools don't offer this integration, but some do (like Kissflow Workflow).

03

If your enterprise doesn't use either of these services, you can choose a third-party vendor who offers active directory service to establish a way to authenticate user identities and centralized access, e.g., OneLogin or Centrify.

Building your own theme park

The bottomline is that most companies will be moving toward having all of their software solutions behind their own single-access theme park. If you invest in a BPM solution that doesn't include this, it will be roped off and you may have to start the evaluation process over again.

07

Integrations

In today's business world, collaboration is key, not only for humans but also for systems. No organization can run on a single software suite and no suite has a workflow tool sophisticated enough to handle all of your needs. Powerful enterprise BPM integration should absolutely be a strength of any BPM system you evaluate.

Types of integration

Modern BPM systems should come with integration capabilities that enable systems to share tasks seamlessly. It should support the following types of integration linked to data:

- Events happening in another system that trigger a new process. For example, when a purchase request gets approved in your workflow management system, you might want to start a purchase request order in your ERP.
- Pull capability, meaning drawing data from a third-party system into your business process
- so that BPM users can use that data and make sense of it.
- Push capability, meaning sending the data to a thirdparty system when the data reaches a particular step (e.g. manager approval).

Data-linked integration is part and parcel of system-level integration, which is what you should look for in a good business process management system. Your business processes gain more traction and interoperability when a BPMS offers hassle-free integration with other platforms such as G Suite, Office 365, and other SaaS and cloud services.

Is all-inclusive BPM integration possible?

By design, every business process management system comes with some kind of integration, although the range of integration might vary from one product to another. However, with the quick pace of new processes being introduced in the enterprise ecosystem, BPM vendors can't include default integration with all of the newly introduced applications. Any software can only support N number of integration capabilities. If it needs to integrate with other products without additional connectors, enterprise bpm integration can employ custom integration to collaborate with other systems using Application Programming Interface (API). APIs allow two platforms to share and access data, functions, or features between them. This is also helpful for modern BPMS to integrate with an enterprise's legacy systems that don't come with out-of-the-box integration capabilities.



Integrate and Thrive

When you look into the future, the need for software to communicate well across platforms is extremely essential. There will continue to be mega ERPs and other software suites that try to bake BPM into a larger portfolio, but these always have functional and cost restrictions. The safest bet to make to ensure the next five years go smoothly is to choose a BPM solution that easily integrates with all of your other software solutions.

08

Reports And Analytics



Nearly every BPM product out there will claim that they can deliver reports, but are all reports the same? What's the difference between good reports and good-enough reports? How do you know when a BPM tool is committed to good reporting and when they just threw it in as an add-on? When should you demand more than you see?

Good reports turn good “IT directors” into “superstars”

Reports and predictive analysis in a business process management solution helps businesses improve existing processes, forecast market behavior, identify customer expectations, and increase their overall profit margins. When IT managers break down report data to the C-suite into an easy-to-follow format, the management will go crazy about the information.

Imagine the marketing department being able to show data on how long each task takes to complete, or a manufacturing company getting clear data on how their shipping processes can be improved. Data from reports and analytics can work as a compass to guide businesses to take appropriate action and boost productivity.

In essence, great reporting features on a business process management tool mean that you can tell better stories about how your processes are actually improving. Without good reporting, you won't be able to impress business leaders who need to immediately see the value in a BPM solution.

Ready-to-eat data

Building reporting into a BPM solution is fairly easy to do, but it is often in raw data that only the most skilled IT managers can manipulate into a digestible format. Data needs to be processed in a way that makes sense for those consuming it. Companies that are willing to painfully sift through meaningful data are rewarded with insights, but most organizations can't afford the time and skill it takes to accomplish this.

When evaluating a business process management system, ask these questions about the reporting:

- What kind of pre-formatted reports are available?
- Do they show all the information you need?
- How customizable are they?
- Do you have access to the raw data?
- How easily can you export data out of the system?
- How easy is it to share data with other business leaders?

Desireable reporting options in BPM software

At a minimum, your BPM solution should offer you instant reporting in these areas:

- An overview of all uncompleted items
- The min, max, and average time taken to complete a workflow
- The min, max, and average time taken to complete individual tasks
- How often an item gets rejected or rerouted
- How often an item exceeds the task-level deadline or service level agreement (SLA)
- How many items were initiated in a set time period
- How many items were completed in a set time period

Specialized reporting

Some BPM suites offer the capability to issue ad-hoc reports that can be used to generate specialized, domain-specific reports or graphs. For instance, if a business uses BPM for managing its annual expenditure, it can create a domain that has all the information about the departments receiving funds, reasons for spending, the amount spent on each marketing campaign, monthly spending, etc.

It is ideal for a BPM product to present report data and analytics via an interactive UI, such as pie charts or graphs. When users click on high severity data, they should be able to explore the event in a new dashboard and comprehend the details in depth.

Preparing for the future

The reporting functionality of a BPM tool is not something that gets added on later. If a certain BPM solution cares about good reporting, it will include it in even its earliest releases. As you evaluate software, look at the priority placed on reports. If it is high now, it will continue to be high. If it is an unexciting add-on now, don't expect much to change.

Scalability And Performance



In today's market, any small team of 3-4 engineers can put together a product and market it as 'the best business process management software.' Even if their software has all the cutting-edge features that are core to a competent BPM system, its real test begins when it has to manage mounting volumes of data. Software behaves very differently with 100 users as opposed to 1 million.

BPM is supposed to make processes more efficient. But users quickly lose patience and look for workarounds when your business process management software lags or has a delayed response time. When your BPM tool frustrates your users, it becomes more of a liability than a benefit.

When evaluating the best BPM software for your enterprise, find solid answers to these questions:

- How many customers does the provider have?
- What system(s) have they built the product on?
- Is the company able to handle your needs?

Customer count matters

When a cloud BPM product talks about how many customers it has, it isn't just about bragging rights and establishing social cred. More users and customers is a sign that the given architecture is strong enough to support sustained growth.

For most cloud-based BPM solutions, be very wary if they don't reveal how many customers they actually have or if the number is below 1000. Beyond customer count, user count will also give you a good awareness of how well their systems are working. If they have more than 10,000 users in a system, it is likely built to last.

Cloud BPM the road to scale

When looking at modern, SaaS-based BPM systems, performance is directly proportional to the platform it is created on. If the software is built using open technologies, it is easier to implement across various industry verticals. It also implies that the application has a diverse user group because of its ease of integration and adaptability across pre-existing infrastructures.

If the system is modeled with the Rapid Application Development (RAD), chances are, the applications built on the BPM will grow along the way. A process-driven, flexible BPM system always has room to expand and adapt to the growing needs of a business.

Cloud-based BPM solutions do a good job at offering multi-tenant architecture to match their clients' growing base of customers and manage the massive volume of data. Multi-tenant software executes a single software instance on a single server to assist multiple tenants (users groups with similar access privileges) simultaneously. This architecture enables enterprises to support their concurrent users without latency and scale well on executing deliverables.

Opponents of multi-tenant BPM argue that a single-tenant architecture can achieve the same results. However, multi-tenant BPM offers wider visibility and clear data about system usage. Likewise, a business process becomes more efficient when a BPM leverages the existing enterprise resources to handle the increased workload. Having a great architecture and initial successes pave a BPM's way to future performance and scalability, and its scope broadens in terms of handling more voluminous data.

Will the vendor scale?

At some point, you need to look away from the software and look at the vendor providing it. How can you be sure that the BPM software you've chosen wasn't developed five years ago by a few engineers who don't support it anymore?

Important questions to ask

Here are a few ways to make sure that the business process management software you choose can go the distance with you:



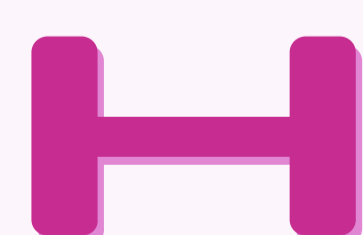
WHAT IS THEIR EMPLOYEE COUNT?

More employees doesn't mean a better product (especially if the majority are sales and marketing), but it can be a sign of how serious they are about growth.



WHAT KIND OF SUPPORT AND SLAS DO THEY OFFER?

Choose a BPM tool that has published service license agreements. Do they offer phone, email, or chat support? Of the three, email is the easiest to hide a low support staff count behind.



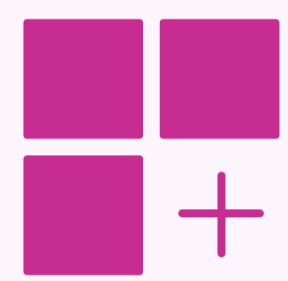
DO THEY OFFER TRAINING?

While you hope your BPM software is easy to use out of the box, it may be worth it to have someone come and do a session for all of your key process administrators. Does the company offer this kind of service? Are there webinars you can attend?



DO THEY OFFER REFERRAL CUSTOMERS?

This should be a no-brainer. If they can't give you the contact details of someone in a similar industry or size who will vouch for the software, then be extremely wary.



HOW DO THEY HANDLE NEW FEATURE REQUESTS?

Are you able to request specific features that would benefit your company? Are they transparent about which new features are coming out? Do they offer a product road map?



HOW MUCH DOCUMENTATION DO THEY OFFER?

Documentation is usually done well after a product is finished and the quality of it can show how serious they are about continuing to support the product? Do most of their articles relate to old releases? Do they offer video tutorials? How many articles/videos do they have?

Go the distance with scalable BPM

Don't choose BPM software that is either built on crumbling legacy platforms or one that is just taking advantage of how easy it is to get a product to the market. Do your diligence to choose a business process management solution that will be there for you as you grow and use it more.

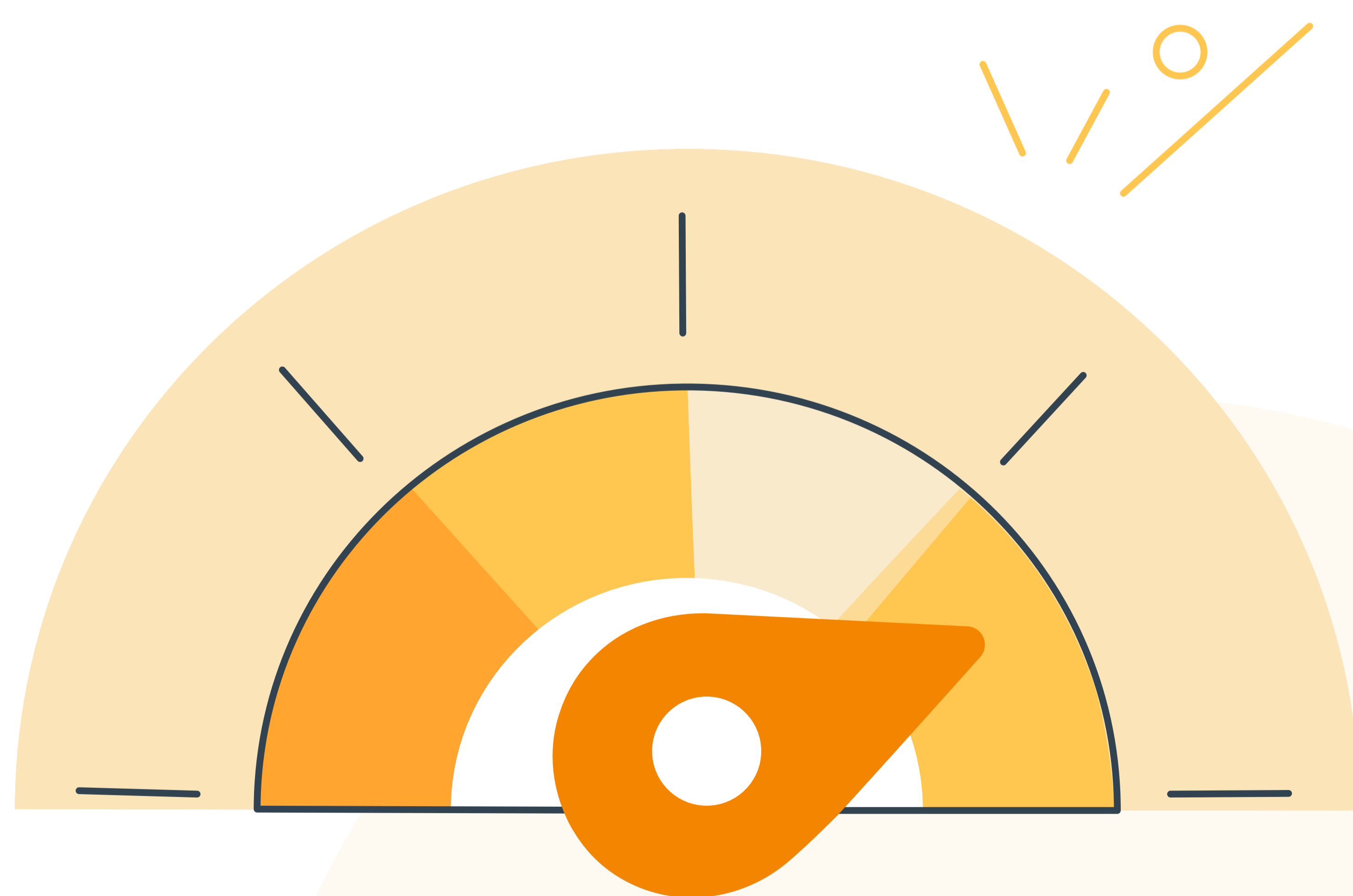
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Process Performance Metrics

All of your business processes have deadlines, but how many fail to meet them? When your process is repeatedly behind schedule, you need to identify what is causing the lag and find a solution for improvement.

For example, Keith is responsible for an Employee Onboarding process. He has set up the entire process to end no more than three days after the new employee starts. However, the final steps can sometimes happen up to two weeks after the new hire's first day. Keith needs a better way to look at his process quickly.



Process Performance Metrics is a tool to spot issues with a process and help enterprises make meaningful decisions to improve processes. The Process Performance Metrics in a business process management system capture process data to allow your process administrator to identify one of two problems:

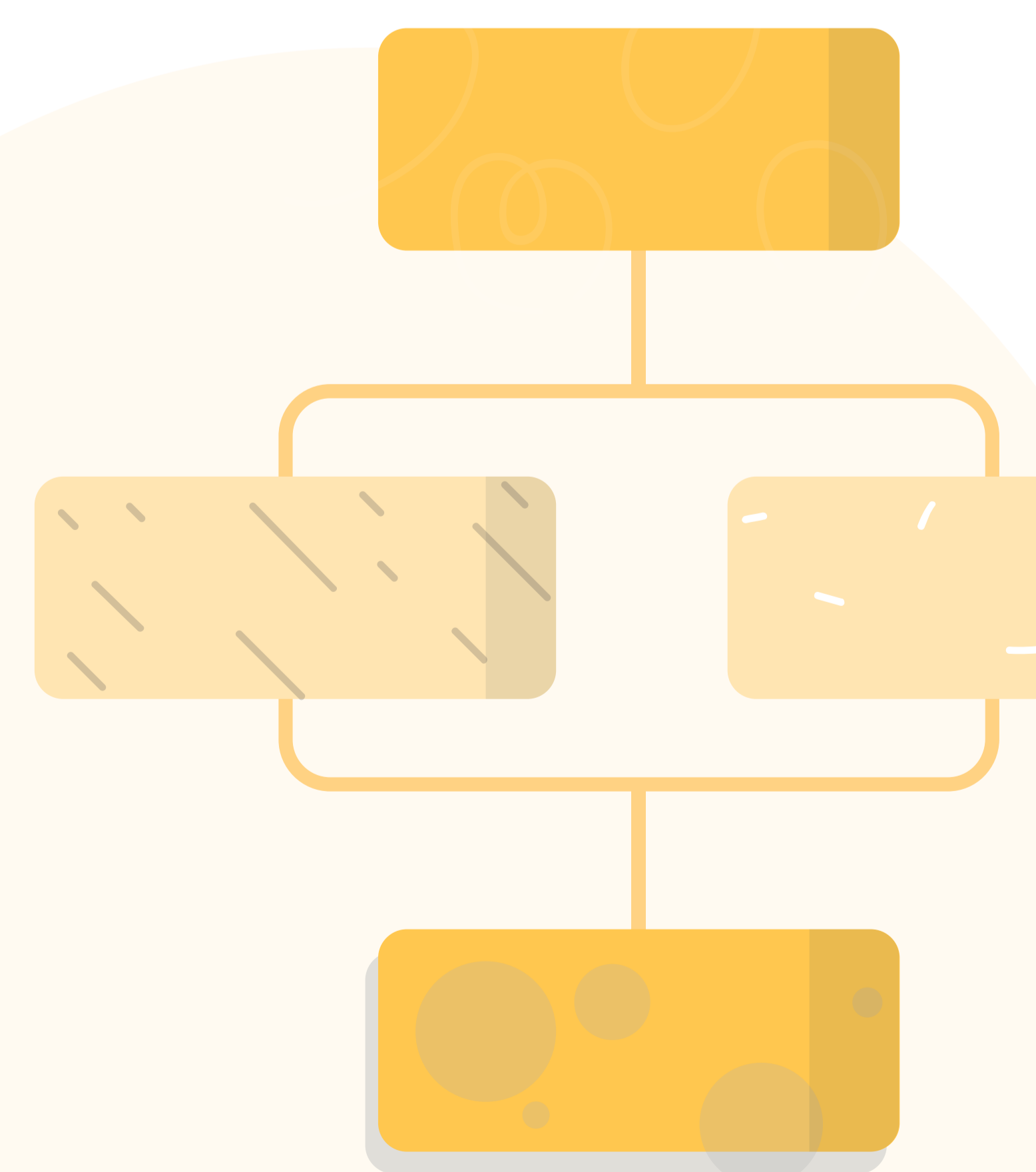
- The process was not modelled correctly (e.g., unrealistic deadlines).
- Person involved in the process was inefficient (e.g., certain tasks were completed outside the system and not updated)

Process-driven metrics

Process Performance Metrics overlap closely with Key Performance Indicators (KPIs). Both help a company know if it is achieving expected goals on time. KPIs are studied at a strategic, upper management level, and oftentimes called 'Strategic Process Performance Metrics'. Process Performance Metrics are integral to BPM systems because they zero in on an individual process at a given time and offer intelligent data.

Let us go back to Keith's situation. When he opens up his performance metrics report, he finds that occasionally issuing new ID cards takes substantially longer than it usually does.

After drilling down further, he sees that several times, this task gets queried back to an earlier step. Keith investigates further and finds that the admin team in charge of issuing ID cards can't see some of the required data, so they usually have to send it back to HR and wait until they manually receive an email or message with the right information. Keith immediately fixes the problem and makes sure each team has the data it needs.



The fault in our processes

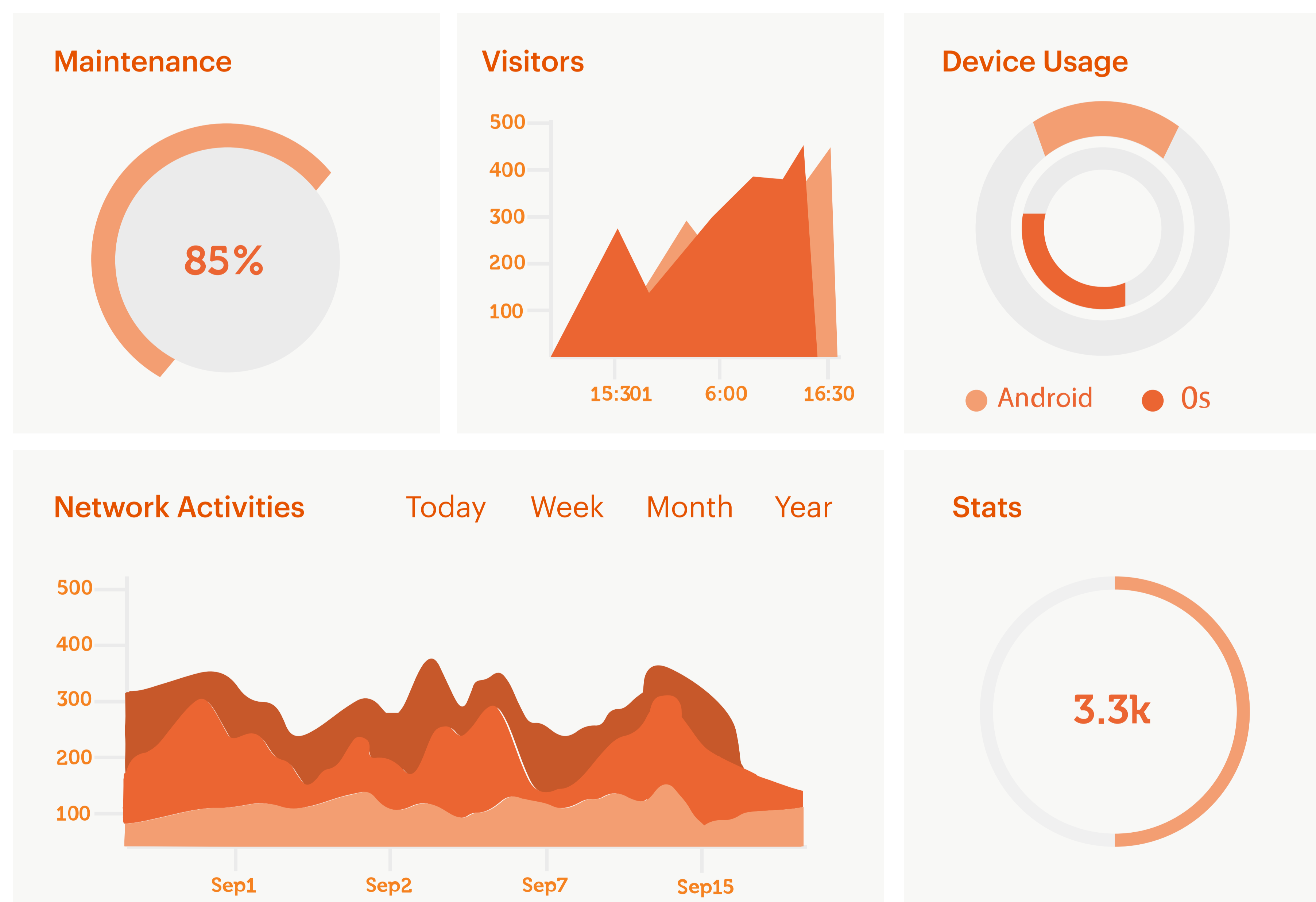
Process performance metrics can be used to reflect and judge a process's efficiency, evaluate a process owner's performance, remove wastage in the process, or identify the mean and max time taken to complete a process.

Through the use of Process Performance Metrics in a BPM solution, an enterprise can achieve three important goals:

- Define threshold time
- Identify deviations
- Identify top performers

For any business to define a baseline expectation of a process, they should first let it run its natural course and stabilize to avoid setting unreasonable deadlines. If a step takes a maximum amount of time, it means there is a deviation in the process and it needs a review. Identifying the most efficient processes and task players helps businesses benchmark other processes at large.

Process Performance Metrics offer great possibilities for companies to improve their process efficiency, and they are extremely important for an organization to create value stream mapping and implement Lean Six Sigma methods.



Are process performance metrics same as reports and analytics?

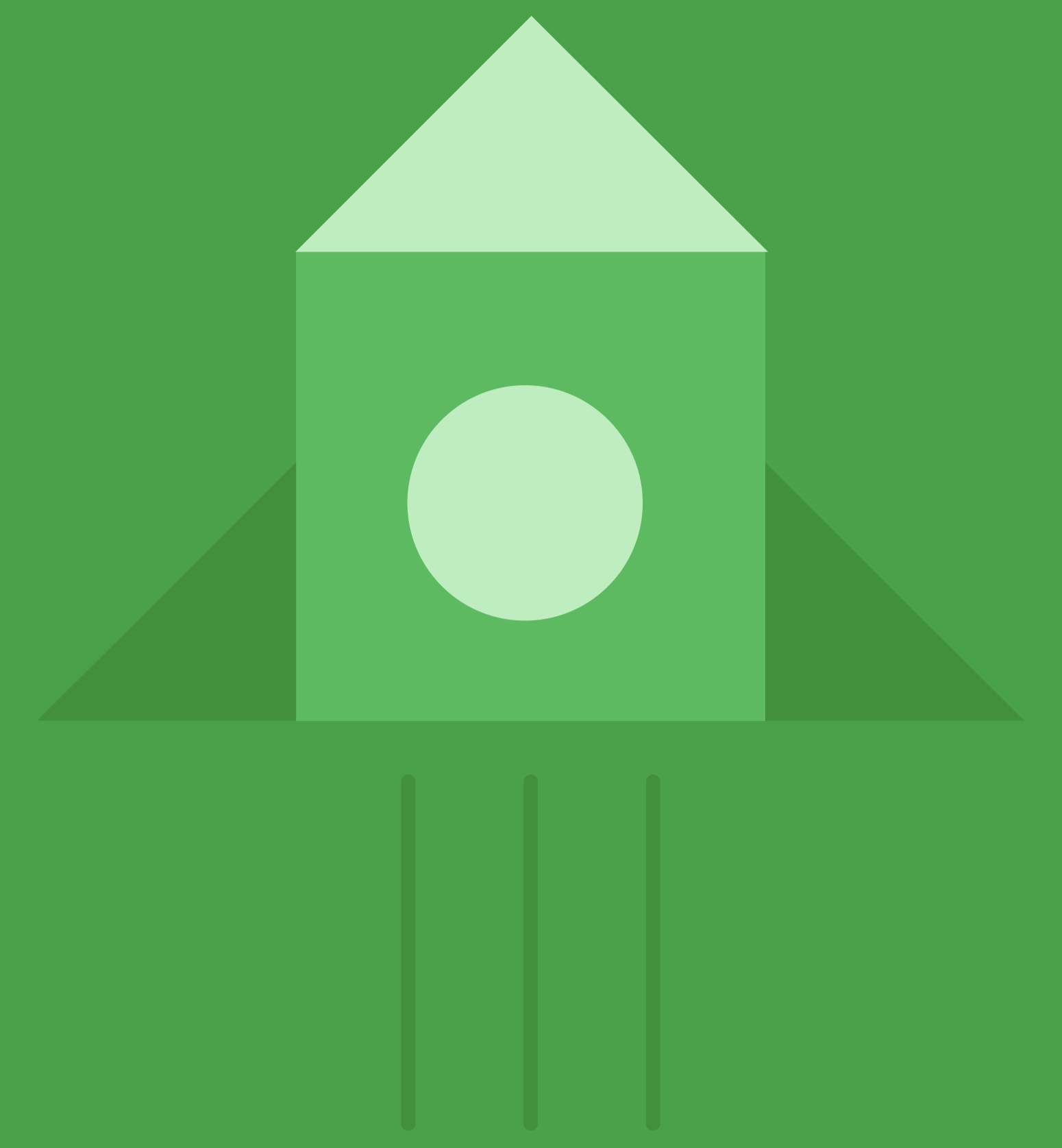
There is a common tendency to mistake Process Performance Metrics with Reports and Analytics, another very important feature in a business process management tool. However, the two tools are fundamentally different in their approach and objectives.

While Process Performance Metrics capture system data and automatically present the summarised information to the process owners, reports and analytics dwell on user-generated data such as data entered in the form when a task is initiated. Reports and analytics help enterprises make meaningful business decisions, whereas Process Performance Metrics help managers make decisions to improve existing processes.

For instance, an e-commerce website that receives hordes of customer orders for laptops can use reports and analytics to understand which brands of laptops sell the most, and during which months. Understanding customers' buying patterns helps the company plan its future inventory well.

In the same example, if the company receives a lot of customer complaints about a certain item taking longer than the promised five days to deliver, the management can evaluate the Process Performance Metrics to identify who is the culprit - the inventory team, the packaging and shipping department, or the dispatch team.

As you look for the best business process management tool, don't overlook process performance metrics. They are the heartbeat of continuous improvement and your efforts to improve processes, later on, will be handicapped without them.



+1 Bonus tip

Embrace Shadow IT To Empower Users

Business leaders want to have increasing control over the software they use; they want to pick it, play with it, and implement it across their departments without much interference from IT. This is one technology trend that is note-worthy while considering a BPM solution. Yet, they still hold IT accountable when it comes to integration, bug fixes, data security, account maintenance, and customizations.

If the IT director exercises authoritarian control and forces all software to be centrally controlled, business leaders balk and demand their freedom. If IT directors allow complete freedom, the situation turns to anarchy and they become little more than errand boys sent to fix software that doesn't fit with the organization's size, goals, or security standards.

What is shadow IT?

Shadow IT is an IT system or solution that is used in an organization without explicit approval. It might be the marketing team signing up for a digital marketing platform or a sales team tracking leads with their own platform, all without IT's knowledge.

Shadow IT brings short-term advantages to the department but it also comes with long-term problems. What happens when a department gets used to using a system that doesn't scale as it grows? What kind of proprietary data is being stored in unsecured cloud systems?

What contracts were signed at the time of purchase? How reliable is the system? What if it tries to connect to other unapproved software with API endpoints?

Recent surveys suggest that 80% of workers admit to using SaaS applications at work, often without IT approval. 40% of all IT spend comes from outside the IT department.

Is there a single solution to shadow IT?

When it comes to business process management (BPM), an organization-wide IT strategy seems to be the best fit. You invest in a sophisticated high-end solution to map out your complete order processing service and hire an expensive consultant to set it up for you.

But what about the administration team that now wants an automated process for visitor passes to your facility? It hardly seems worth it to spend the same amount of time and money to set that process up as well. Plus, the admin team is convinced that it is a simple process and gets glassy-eyed when you tell them it will take about two months to set everything up and test it in the new system, you don't want to manage two or more business process management tools for the same company.

In the ideal world, IT directors need a solution that:

- Everyone can use
- Is cost effective for both large and small projects
- Doesn't demand a lot of involvement from IT staff

The best approach

When it comes to selecting the best business process management software, IT directors need to stick to these guidelines.

1. CHOOSE A PLATFORM

If you are managing the BPM needs for an entire organization, don't choose something that seems to be specialized only for a very small niche group. A platform will allow you to create an unlimited number of automated processes based on requirements.

2. STICK WITH HUMAN-CENTRIC BPM

A human thinks about processes in terms of a sequence of business tasks. A machine thinks about processes in terms of conditions, mapping out every exception, and identifying logical errors. The best business process management tools will allow a human to think in terms of the most likely scenario for a process to follow.

3. VERIFY THE QUALITY OF SUPPORT

Great customer support from a cloud BPM tool is essential to pulling off a great shadow IT-BPM solution. High-quality support should be able to help you create complex processes, and also address any everyday issues your users have. Support includes on-demand (preferably instant chat, but also phone and email) and detailed documentation. Before you invest in a BPM solution, examine the support features. What kind of documentation do they offer? Is it comprehensive or minimal? What are their SLAs for service? How quickly do they respond to questions? When you look at reviews for BPM products, pay attention to how often customers talk about the level of support.

Empower users, retain control

Shadow IT may seem like a good option in the short term, but all IT directors know the dark paths it could lead to. However, being authoritarian can't work in today's world of technology. When searching for a business process management solution, find a platform that is human-centric and has a high level of support; then you can spend more time on the tasks that matter!

About Kissflow Workflow

Kissflow Workflow is a robust BPM platform that lets business users create, model, deploy, and manage business processes, all with very little to no coding knowledge. It follows a lightweight approach compared to other BPM tools, empowering non-coding team members to design processes that they are familiar with. It offers a simple visual interface, with drag-and-drop features that let you create any kind of processes that you need. Kissflow's BPM capability empowers you to create simple to complex processes within minutes.

If you are looking for a BPM solution that can take you into 2022 and beyond, try Kissflow's BPM capability today and imagine how your company will embrace it to become more productive and cost-effective and have a lot of fun doing it.



All-in-one platform designed to simplify
your business processes

Kissflow BPM



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