

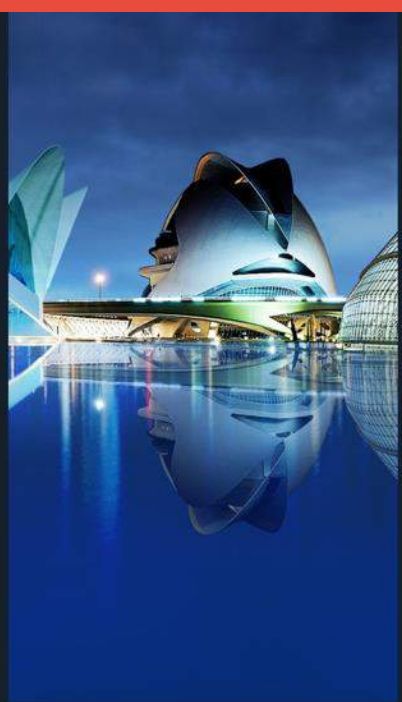


Making Process Personal

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BPMNext 2018



MIMACOM



2010



300+



Flowable Products



Flowable Core

Open Source engines for BPMN, CMMN and DMN based processes, cases and decision tables



Flowable Platform

Quickly build solutions using a powerful and flexible Case Management platform



Flowable Engage

Use chat to engage with your customers, citizens or colleagues, blended with Case & Process Management



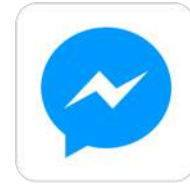
Banking is focusing
on customer
engagement

—
Everyone's talking about it

Global banks

- Relationship Management
- Digital Desk
- High wealth clients
- Expert advisors
- Compliant conversations

Customers want to engage by chat



Bots



AI



ACM



BPM



ECM

Back Office Systems and Services

Apply standard models to the new conversation channel



For compliance or best practice



01

BPMN

Business Process
Management



02

CMMN

Case Management



03

DMN

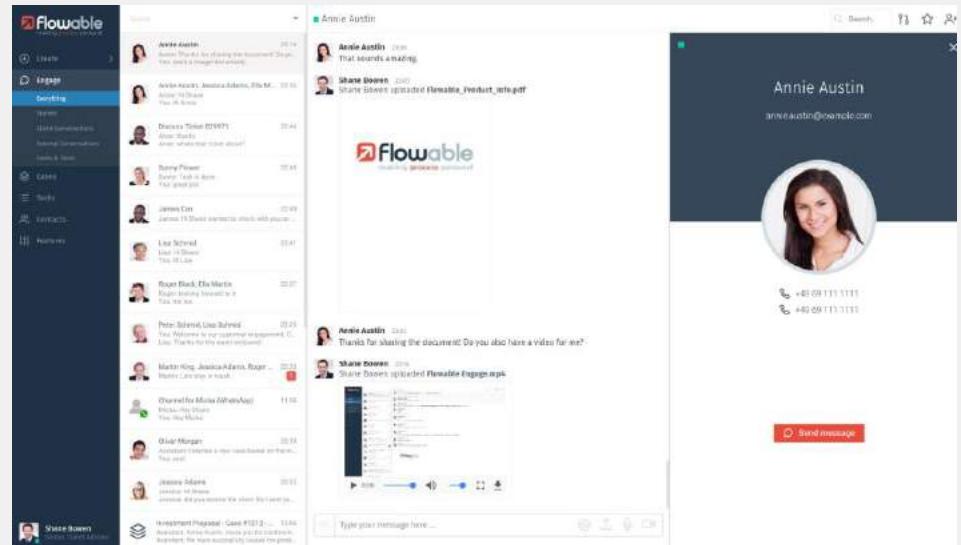
Business Rules through
Decision Tables

Chatbots augment the conversation



Define behaviors through BPM

Case and process models describe how a chatbot can interact in a chat

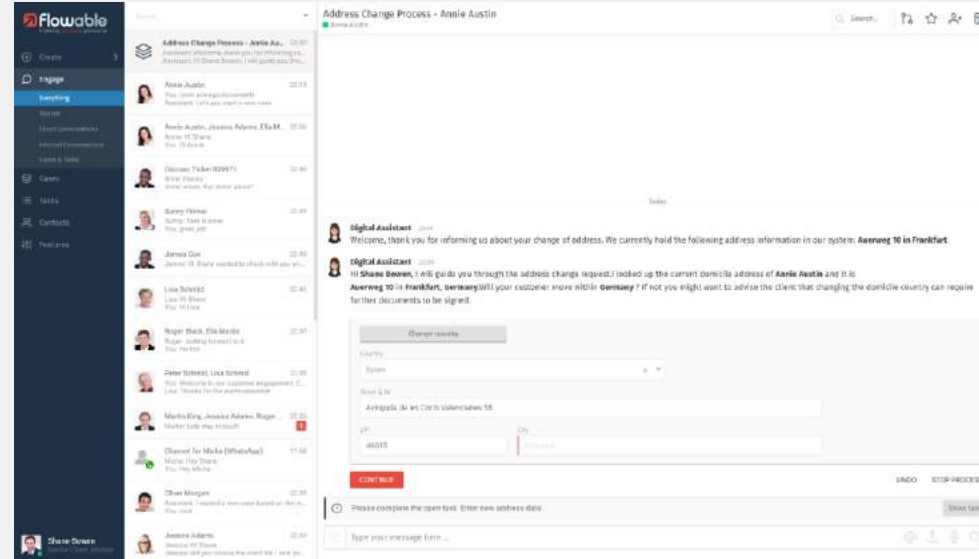


Chatbots augment the conversation



Structured questionnaires

Introduce forms and flow seamlessly into chats with collaborative data filling



Chatbots augment the conversation



Tasks, Reminders and timed actions

Timer events trigger processes that start interacting at a future time

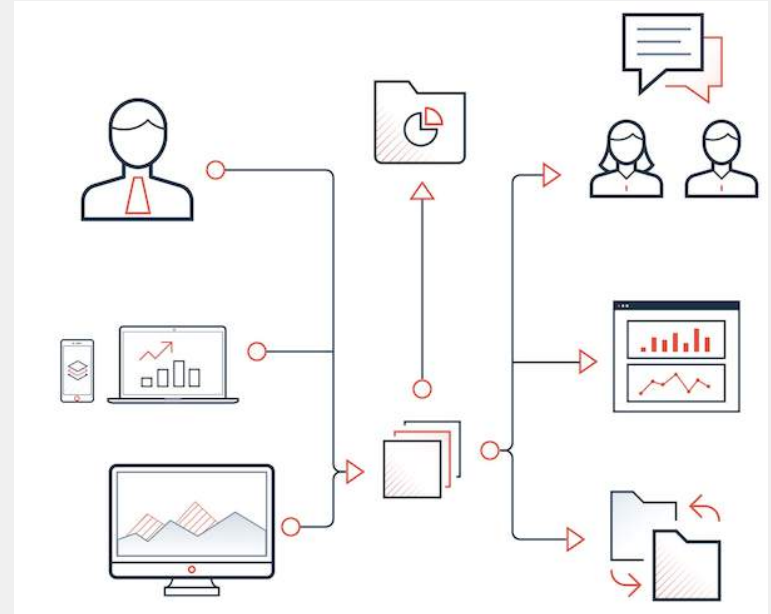
The screenshot displays the Flowable chatbot interface. On the left is a dark sidebar with navigation options: Home, Engage, Searching, Recent, Recent conversations, Recent conversations, Recent & Done, Other, Tasks, Defaults, and Features. The main chat area shows a list of messages from various users, including Oliver Morgan, Anne Aspell, and others. The right side of the interface shows a detailed view of an 'Investment Proposal - Case #12 - Oliver Morgan'. It features a map of Europe with a red pin in London, indicating the user's location. Below the map, there are buttons for 'Digital Assistant', 'Share Bowen', and 'Oliver Morgan'. A 'Cross-Border Suitability' section is visible, with tabs for 'Level One Check', 'Level Two Check', and 'Level Three Check'. The 'Level One Check' is selected, showing a grid of countries: Switzerland, United Kingdom, and United Arab Emirates. Below this, there are sections for 'Applicable Legal Themes' (European Regulation (ESMA), United Arab Emirates Regulation (SCA, DFSA), Swiss Regulation (FINMA)) and 'Suitability Level' (Socialising, Providing marketing material about the bank, Presenting the bank's banking services, Providing the bank's annual report and press review, Providing a Business Card).

Conversation as Case Management



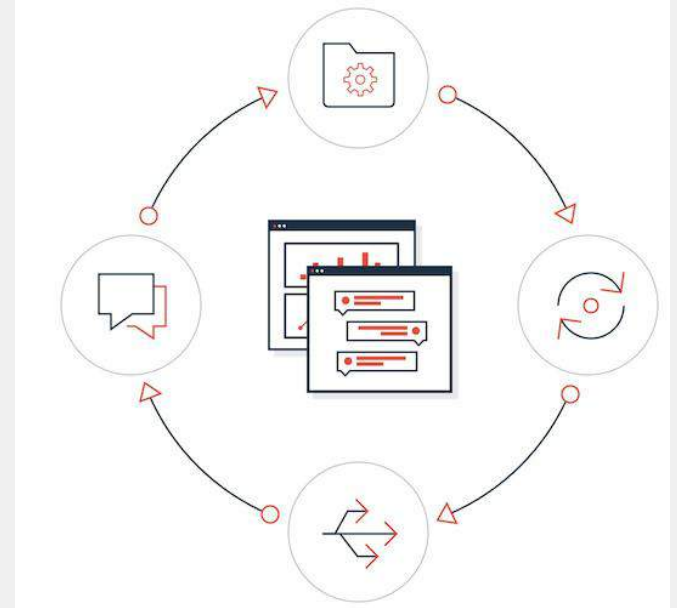
CMMN as a Conversation Container

Model what interactions are available and appropriate at different stages



Conversation as Process Management

- ✓ Bring together processes and ad hoc tasks
 - Mix auto-start of processes and auto-create of tasks, or processes made available on demand

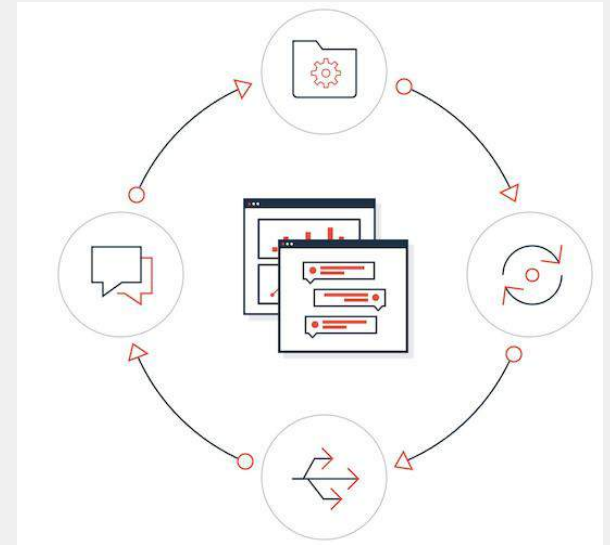


Conversation as Process Management



Conversation flow needs dynamic processes

Inject new processes as the conversation takes different turns and digressions



Automate with intelligence

Learn from structured conversations and make suggestions based on previous interactions

Dynamically modify processes and switch human decisions for machine learned rules





Build intelligent capability incrementally

01 Level one: User-driven dynamic change

- “I also need this domicile documentation”
- “I want to do a PEP check again now”

Build intelligent capability incrementally

02

Level two: Assisted adaptive change

- “When you entered this before, you wanted extra documentation. Do you want it this time?” – “Yes” – “Should this be done every time by everyone?” – “Yes”
- By design, create a new rule or change a process




Build intelligent capability incrementally

03

Level three: Machine Learning driven change

- “With data like this, users almost always take this path. Confidence levels mean I don’t have to involve a user to decide.”
- “There seems to be a rule around these variables. Machine Learning confidence levels mean I’ll add it.”



Demo



Time to take it you on a customer journey



Demo Scenario

High Wealth Client wants to talk to their Relationship Manager using their chat app – a questionnaire needs completing



Demo Scenario

Blend structured process in the unstructured chat all defined using BPMN



Demo Scenario

Replace asking the user to decide with a Decision Table generated by Machine Learning