

7 STEPS

TO CHOOSING AN ENTERPRISE BPM SOLUTION



ProcessMaker
Workflow Simplified

OVERVIEW

Business process management software (commonly referred to as BPMS or BPM software) is designed to provide your enterprise organization with increased value and competitive advantages. Choosing the best BPM software for your company requires upfront effort to document your company's "as is" and "hoped for" processes. You will also have to build the right team of stakeholders to participate in the project, and invest in the automation software itself. However, a well-chosen solution and well-executed implementation process pays off in more ways than one.

If you are in the market for a BPM software solution, it can be overwhelming to sift through the dozens of qualified providers to find the perfect fit. The more work you do beforehand to better understand your company's particular use case, the easier it will be to identify the BPM software solution provider that best matches your needs.

To ensure that you're selecting the right enterprise BPM solution for your organization, we've outlined seven steps to follow. This will allow you to determine which software system is the right one for you.



1. Identify and document your current business processes

Before you start looking for possible BPM options for your enterprise, identify your “high priority” processes (at least 3-5 processes, preferably many more) that you wish to automate first. Determine their important characteristics, including any necessary system integrations or connections. While you will need a broad list of software requirements, be mindful that you absolutely need at least one detailed process specification document. This will serve as your litmus test for each potential provider. This documentation will allow you to run internal and external POCs (Proofs of Concept) based on your company’s actual requirements, as opposed to generic industry requirements. **Without this full process documentation in place for at least one process, we do not recommend that you start talking with BPM solution providers.**

What do we mean by a fully documented process specification? Your documentation should include a visual process map, a description of tasks and steps, detailed specifications for your integration points (this is very important), examples of forms, and form behaviors. Do you want single column or multi-column forms? Will you need to apply a corporate style sheet to these forms? Additionally, you should specify any requirements you have regarding the user process portal. Will your users want to participate in processes from their email client, a mobile app, a content management system, or within a standard task inbox?

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What about documents? Will you store your documents in Sharepoint, Box (or another cloud content management service), Google Drive, or within your BPM solution’s document management system (DMS)? Do you need your BPMS to have a document viewer, advanced search characteristics, or direct OCR/ICR capabilities?

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You should also have a comprehensive list of your enterprise systems. It’s important to know which of these enterprise systems will integrate with your processes — and how the integrations will work.

As you can see, identifying your current business processes and fully documenting your requirements will help to ground your BPM requirements checklist. The worst thing you can do is to accept a BPM provider’s generic specification document as a checklist with which to compare BPM vendors against. While these tools can be a good start, they leave out many of the most important requirements unique to your enterprise. A broad, unfocused checklist limits your possible vendors and tends to increase the cost of the solutions you choose because you end up simply chasing buzzwords. Oftentimes the most expensive vendors in the industry are the ones touting these phrases. If you aren’t prepared, you could lose big and be talked into unnecessary features your particular organization has no need for.

On the other hand, if you go into the process with your true needs documented in your actual process specification documents, then you maintain control throughout the buying process and set your company up for success.



2. Consult key stakeholders

Ask upper management, department heads, and IT employees for their input and insight. Rather than building your project based on assumptions, consult with divisions across the company that will be using the platform to determine your BPMS needs. This ties back to step one: document and build very specific parameters up front. You can then use these documents to get buy in from your organizational stakeholders. The stakeholders will help you refine your specification documents. Only then will you be able to ask software vendors the right targeted questions to find the perfect fit.

As you move through the selection process, consult occasionally with this team of stakeholders. And while you should not cast too wide a net when seeking input, keep end users in mind from day one. When your BPMS initiative goes live, you want users that are prepared, educated, and encouraged. Inform upper management of costs associated with training and adoption early in the BPMS initiative. It's much better to uncover hidden costs before committing to a solution.

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While consulting key stakeholders, make sure to define their involvement in the selection process because otherwise it will slow to a crawl. Executive support and checks and balances must strike a happy equilibrium to maximize BPM success.



3. Create your list of technical criteria

After you have completed steps one and two, you will want to further review your process specification documents and put together a specific list of technical criteria. Many enterprises make the mistake of trying to skip the first few steps by starting here or (worse yet) they take a technical criteria list from a pushy vendor and use it as their own list. Your organization's technical criteria list needs to be based on your process needs and not a common list of features.

Build out your own list by evaluating your organization's current situation and future plans. How will potential solutions integrate with your existing infrastructure and technology? Are you looking for a cloud-based or on-premise system? There are benefits and drawbacks to each hosting method. Some IT security policies don't allow for certain systems to rely on cloud access, for example, and regulatory compliance with sensitive data storage must be taken into consideration. At the same time, [cloud-based systems](#) carry no server maintenance costs, scale easily for enterprises, and can be accessed from anywhere. Take into account that many BPMS providers offer both cloud and on-premise solutions.

GDPR is the concern that is currently at the top of the list for many organizations implementing global systems. Your organization may already have dedicated GDPR consultants that are assisting in projects of this nature to determine what must be considered in a selection process.



4. Set and qualify realistic implementation goals

As you begin to research software and speak with specific BPM providers, request implementation estimates from each potential solution. Reach out to existing customers of each solution to get an idea of their timeline and onboarding experience with the provider. You want to define the project plan, so you need a working time frame. Be sure to consider the following items in your implementation checklist:

- Workflow design
- Data migration
- Software installation
- Solution testing
- End user training

Some enterprise BPMS providers can promise implementation completion in 4 to 8 weeks. Is this reasonable? Ask for a reference client where a similar implementation was done in a similar amount of time. Ask potential vendors about their average implementation durations.

Your organization is most likely turning to BPM as a way to better manage time and resources, reduce costs, and increase revenue. Treat BPM software as you would any other business decision – qualify your goals. Estimate and measure the potential business benefits against specific metrics. When it comes to measuring progress, BPM isn't a one-time event. Before implementing BPM software, define ongoing, measurable goals. Why are you doing this? Is one of your goals to go paperless to fulfill a green initiative within your company? Are you striving for a more dynamic work environment? Your answer should cover things such as the following:

- What process(es) are we focusing on?
- What is the primary result of this process?
- Does the process meet its goals?
- What aspects of the process need improvement?
- What changes would improve those aspects of the process?
- How can we measure this?

If you're not tracking potential benefits, you're less likely to achieve them. Reporting assures that you're able to answer how these processes are performing over time, and if any bottlenecks exist that require changes. BPMS that allows you to measure employee efficiency creates benchmarks and assists in qualifying realistic goals once you've been using the software.



5. Select vendors and run a proof of concept (POC)

At this point you're ready to select potential vendors. The exact number of candidates depends upon your organization's resources. We generally suggest identifying five possible vendors based on your criteria. Your initial list comes from content you find from trusted industry websites, direct web searches, and online industry references. Once you have your initial list, obtain reference pricing and initiate topical conversations to see if you're comparing apples to apples. Usually, you'll end up excluding several vendors whose reference pricing is not in line with the others (either by being too high or too low).

After an initial round of conversations, request demos with your list of vendors. Keep in mind that demos always look good. To get the most from your demo, ask questions about your organization's specific criteria. Honest vendors will tell you if they can meet the criteria or not. (Don't expect any one vendor to meet all of your criteria, though).

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Once you've finished the demonstration rounds, we recommend moving to a POC with one or two vendors. Generally, the assumption at this stage is that you are satisfied with their pricing and will be ready to move forward if the POC is successful, i.e. if the solution works according to pre-established criteria.

At most, run a POC with two vendors. Remember, by now you already know pricing conditions, so you're merely using the POC to validate that processes can be executed as expected (or you may even be using the POC to present the solution to the rest of your organization).



6. Put brand blinders on

When it comes to software purchases, too many enterprise organizations select a solution based off of a brand name or what their competitors use. This is extraordinarily ill-advised. You should choose the option that best meets your unique requirements. There are dozens of viable BPMS solutions on the market, each with their own strengths, levels of functionality, and flexibility. The best branding and the best marketing is not usually the most important part in deciding whether the fit will be good for your organization.

Use this to your advantage. Find a system that can check off most, if not all, of your requirements now (and in the future). Look for a provider that demonstrates consistent response to client feedback and an embrace of digital transformation. These software companies are most likely to remain informed and up-to-date with digital trends, providing you with the latest technology solutions for current and future requirements you may have.



7. Move forward to success stories and references

A salesperson knows their product inside and out. They can tell you everything you need to know about their software, but even so, their advice isn't objective. Be sure to dig in on the success stories. Look up case studies. Forget the competition — look to individual customers and read software reviews. Rely on the companies that have purchased their solution and read up on their reviews.

Don't believe everything you read, though. Ask to set up a call with 2-3 existing customers that seem to be most similar to you. Perhaps they're in the same industry as your organization, or maybe they migrated from the same ERP system or the same portal and faced similar integration challenges. References are a great resource because they've been where you are and they can offer insight into implementation, customer service, daily software use, employee adoption, and more.

Next Steps

The next step, of course, is the contract. This can be rather easy if you work in a mid-market organization. However, if you are in a large enterprise, expect that this stage will take a long time. The legal stage for an enterprise software contract can take several months, so be prepared. (We won't dive into software contracts in this guide because the subject could easily fill another eBook).

If you follow the steps outlined above, and adopt the mindset that BPM is more than just a project, you'll be armed with the knowledge you need to pick the perfect solution for your organization.

While each BPM solution differs in pricing and approach, almost all software systems carry the same core features. The distinguishing factor comes from elsewhere. It's about finding a solution and a provider that integrates with your existing systems, fits your culture, works well with your people, and tailors to the functionality you need. Find the BPMS solution that can be whatever you need it to be.

[Contact ProcessMaker today.](#)

Who We Are

ProcessMaker's [enterprise BPM software](#) is a leader in BPMS for the mid-market and enterprise. ProcessMaker focuses on keeping its solution clean, simple, and unburdened by unnecessary feature bloat like so many of its competitors. ProcessMaker works with some of the most recognized clients in manufacturing, banking, insurance, healthcare, higher education, telecom, and other industries.

ProcessMaker Enterprise helps you optimize the investment you've already made in your existing ERP, financial, and legacy systems. Our solution acts as the bridge between these platforms to eliminate information silos. We stand apart from other BPM providers with our great reputation, clean product design, and extremely dedicated support and implementation teams. We focus on your pain points and help you resolve your issues to deliver a measurable ROI. BPMS onboarding with other providers can take six months or longer to complete, whereas ProcessMaker Enterprise clients are up and running in significantly less time. Just ask our customers. Our recognition in the [BPMS world](#), from [customers](#) and [industry leaders](#) alike, is a testament to ProcessMaker's excellence.

Check out a few of our [success stories](#) (we've organized them by industry to make the process easier for you). If you are interested in discussing whether or not ProcessMaker is a good fit for your particular BPM needs, then please reach out to us to arrange a consultation and demo.